Patient Administration System

HC1 Scheduled Clinics
(HC1S)

Version N2.2
July 2011

CONTENTS

Patient Administration System (P.A.S) Course

1.   GENERAL COURSE INFORMATION

COURSE TITLE	**HEALTHCARE WIDE SCHEDULING - SCHEDULED CLINICS**
METHOD OF TRAINING	Classroom
DURATION	5 hours
PRE-REQUISITES	PMI(1) - Add & Revise.

ABOUT THE COURSE

This course is tailored to your clinical area requirements. Within the Clinician Diary environment referrals, appointments, activity and patient outcomes will be recorded on to PAS.

SUITABLE FOR

All Staff - Clerical & Clinical within a Healthcare environment

OBJECTIVES

This course will enable the student to:

1.   State their personal responsibilities for Data Protection and the Caldicott Principles.

2.   Log on and off of the P.A.S. system.

3.   Find and select a patient.

4.   Record a referral.

5.   Record and manage Healthcare appointments.

6.   Record and manage outcomes and disposal codes for Healthcare appointments.

7.   View details within Enquiry functions.

8.   Revise and delete activity as appropriate.

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

This functionality will allow you to record patients that have been referred to a specific department and clinician, plus details of their appointments / contacts and the outcomes of these visits.

All Departments have a specified Service Group code to be able to identify their activity e.g.:-

Department	Service Group Code
Physiotherapy	PHY
Urology	UROL
Disablement Services	DSC
Rheumatology Nurse Specialist	RHEUM
Breast Care Nurses	BCN
Adult Mental Health	AMH
Podiatry	POD

5.   MANAGING A REFERRAL

5.1.   Recording a Service Group Referral <SGR>

This function will allow the entry of the Service Group Referral onto P.A.S. Before proceeding with this function you should ALWAYS search for and check the patient's details in function LIS.

The Referral Screens will be tailor for your departmental needs. Development of the Healthcare function is ongoing therefore additional fields may be added to the referral Screens.

Whilst adding a referral you will get the opportunity to add or revise demographic details if necessary. To add a referral you must know the clinician or the generic code that the patient has been referred to.

1. Select SGR.

2. Using the recommended search procedure search for the patient that you are entering a referral for. If your patient is not on the PAS database you will be taken to the PAS No where you will enter all the demographics for you patient. If your patient already exists on PAS you will be given the opportunity to revise/update the patient demographic on the next few screens.

3. At Case Note Details Screen use F9 and select the current Case Note (Super help Screen).

    If there is no current case note number **PLEASE check with your supervisors for the correct procedure for your Service Group.**

4. Amend the first Registration Details Screen if necessary, with the patient's registered Dentist, General Practitioner, Next of Kin etc.

```
                 S e r v i c e   G r o u p   R e f e r r a l
   Registration Details                         23/12/05 10:42 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)   :
```

5. Amend the second Registration Details Screen if necessary.

It is very important to reflect the source of your referral. This has financial implications for the Trust.

- **GP** – This will default the registered GP details' from the previous screen. If the referring GP is not the registered GP, please amend with referring GP details; use F9 to locate GP code.

```
                    C l i n i c i a n   D i a r y
     Registration Details                        01/06/05 14:58 QAH
   ┌Name┐                          ┌Valid Codes┐
   │TRIAL, MANNIE                  │CNN  Consultant Non-Written Referral Request
   │                               │CON  Consultant Written Referral Request
   │Do you wish to revise any of th│DC   Dental CON Written Referral Request
   │Agreement      :               │DCN  Dental CON Non-Written Referral Request
   │                               │GDN  GDP Non-Written Referral Request
   │Commission Ref :               │GDP  GDP Written Referral Request
   │Referred by    :GP             │GP   GP Written Referral Request
   │GP Code        :830968   Org Co│GPN  GP Non-Written Referral Request
   │Surname        :BAGSHAW        │OPT  Optician
   │Title          :DR      Initia │OTH  Other
   │                               │SLF  Self Referral
   │Address        :280 HAVANT ROAD└
   │               :DRAYTON              Do you wish to view? :NO
   │               :PORTSMOUTH
   │               :HANTS
   │Postcode       :PO6 1PA
   │Phone          :023 92374022
   │Reason For Change        :
```

See the following page for referred by choices:-

- **Con** – The code for Referrals from an Internal (within the PHT) or Tertiary Consultant (from outside the PHT). At Consultant Code F9 to search for an Internal Consultant code or enter NSC for a Tertiary Consultant.

```
                    C l i n i c i a n   D i a r y
     Registration Details                        01/06/05 15:06 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    :CON                         Hants
   │Cons Code      :
   │Provider Code  :                   Postcode    PO9 3LN   Q17
   │
   │
   │                            Temporary Address is not recorded
   │                            Do you wish to view? :NO
   │
   │
   │
   │   Reason For Change       :
```

- **Occupational Health** –Select OTH

```
                    C l i n i c i a n   D i a r y
    Registration Details                    01/06/05 15:06 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    :OTH                          Hants

                                     Postcode    PO9 3LN   Q17


                             Temporary Address is not recorded
                             Do you wish to view? :NO




    Reason For Change        :
```

6. The Patient Referral Screen will reflect the choice made on the previous registration Screen. Complete the screen with factual information. Predicted Outcome is not a mandatory field press enter to bypass.

NOTE: Referral Source must reflect the correct code. Use F9 to view options.

Referral By	Con/GP Code		Patient Referral screen ref by & ref name field
GP	GP		Accept default
Internal Consultant	CON	Cons Code F9 search on the surname of the internal clinician.	Accept default
Tertiary Consultant	CTR	Cons Code enter NSC (NON-SPECIFIED CONSULTANT)	Over type with Non PHT Consultant details.
Occupational Health	OTH		OCH

7. The following Treatment Caseloads field on this Patient Referral Screen will only appear if it is and install option for you Service Group.

   Use super help to see your options i.e. Class Group/PCT/Rotation Staff/Family History/Lead Clinician/Clinician. (Patient is added to a cumulative list that can be viewed / managed in CCD – Clinician Treatment Caseload view).

```
                    C l i n i c i a n   D i a r y
    Patient Referral                         01/06/05 15:34 QAH
   │Name├
    TRIAL, MANNIE                             PAS No. 01018604

    Treatment Caseloads
    :JNRROT   JUNIOR ROTATION
    :
    :
    :
```

8. Only Primary Diagnosis & Severity Fields to be completed.

```
                      C l i n i c i a n   D i a r y
     Patient Referral                           01/06/05 15:36 QAH
   ┌─Name├──────────────────────────────────────────────────────────┐
    TRIAL, MANNIE                               PAS No. 01018604
   └─                                                               ─┘

              Referral Diagnosis/              Severity
              Diagnosis Outcome

   Primary    : ██          Diagnosis Search :
              :             Code      Description
   Subsidiary :            ┌───────────────────────────────────────┐
              :            │Change Search Selection                │
   Secondary  :            │ABI       ACQUIRED BRAIN INJURY         │
              :            │AMP       AMPUTEE                       │
              :            │ASTH      ASTHMA                        │
              :            │BD        BLADDER DYSFUNCTION           │
              :            │CPA       CEREBRAL PALSY – ADULT        │
              :            │CPP       CEREBRAL PALSY – PAEDS        │
   Comment  1 :            └───────────────────────────────────────┘
           2 :
   Referral Outcome   :
```

At **Primary Referral Diagnosis** please record the relevant code to reflect data pen codes.

☞ **NOTE**: Your manager should have issued you with laminated codes for your Service Group. If you use the F9 super help you will see codes cross all of the Service Groups.

At **Severity** please reflect the Priority for the original referral details ie Urgent or Routine.

9. Enter Y for Yes to record your referral.

10. At select Document you may print out Bar Code Labels, Patient Identification Sheet, and Letter etc.

5.2. Revision of an existing referral <SGR>

A referral may be revised by selecting the appropriate SG REG, when the field **Command** appears use super help (F9) to LIST or REVISE the existing referral.

```
              S e r v i c e   G r o u p   R e f e r r a l
     Command and Case Note Details              23/12/05 11:10 QAH
   ┌─Name├─────────────────────────┐ ┌─┤Valid Codes├────────────────┐
    TRIAL, MANNIE                     │LIST    LIST PATIENT RECORD   │
   └─                                 │REVISE  REVISE PATIENT RECORD │
     Command       : ██               └──────────────────────────────┘
```

5.3. Deletion of a Referral <DER>

If a referral has been entered in **error**, it may be deleted using the function DER.
Patient's whose Service Group outpatient episode of care has come to an end **must** be discharged with an appropriate reason using SGD.

6. MANAGING APPOINTMENTS

6.1. Follow up book appointment <FBA>

Follow up Book Appointment can be used to make NEW or FOLLOW UP appointment.

1. Select the Service Group Referral (SG REG) that you wish to attach an appointment to.

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


 1  SG REG     05/05/05 Cli:RK       SGp:IMT  NHS Q257981
```

```
 <More available>
Select/Continue  :1
```

2. **Clinic Title**:   Enter the clinic title that you wish to book an appointment to.

3. **Clinician**:   Enter the Clinician Code (may default)
4. **Appt Type**:   Enter appointment type if known, otherwise<Return>. If this is populated you will be offered the specific appointment type only.

5. **Urgent**:   Yes/No. This is only offered if appointment type not completed. If Yes only the urgent slots will be offered.

```
 OP WL:  PMPOFU   Con: PMP     Spec:  100   Date Reqd: 12/2004      FU
 OP WL:  MJWOWL   Con: MJW     Spec:  100   Date Reqd: 04/2004      NR

Display more appointments? :NO
  Clinic     :RKAM        TRAINING CLINIC
  Clinician  :RK          TRAINING CLINICIAN
  Appt Type  :NEW         NEW                          Urgent ? :
  Day        :                   From Time :           To Time  :
  Date/Time  :010605
```

6. **Day**:   Complete if particular day of the week required.

7. **From Time**:   If completed, will offer appointments from that time onwards.

8. **To Time**:   If completed, will only offer appointments before that time.

9. **Date**:   Complete with either:

F	=	First Available	?W	= Weeks
T	=	Today?	M	= ? Months
12M	=	One Year	10199 =	Date

Depending on the specified criteria a list of possible days/dates or timeslots will appear on the screen, select appropriately. If you wish to move back a screen B=Back. Once the appointment has been selected complete the Appointment Details screen and enter Yes to save the appointment.
If you are sending an appointment letter F9 at the Select Document Screen, F9 again to select the appropriate code.

6.2.   Clinician Timeslot View

At the Clinician Timeslot Display screen, if you wish to view patients already booked to the timeslots

```
      Clinician Timeslot Display                     24/05/05 13:12 QAH
  ┌─┤Name├─
   PIKE, JANICE                                      PAS No. 06055932

 Clinic    RKAM      Clinician  RK              Appt Type NEW      WED 01/06/05
 No.   Time          CAB Typ Bkd Fre   Typ Bkd Fre   Typ Bkd Fre  TOTAL:Max Bkd Fre

 Session - 08:30-12:30
   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



   Select     :v▮                      Continue on warning?  :
```

type V at the select field. (This may help you when considering overbooking an appointment).

```
      Clinician Timeslot Display                     24/05/05 13:13 QAH
  ┌─┤Name├─
   PIKE, JANICE                                      PAS No. 06055932

 Clinic    RKAM      Clinician  RK              Appt Type         WED 01/06/05
 No.   Time          CAB Typ Bkd Fre   Typ Bkd Fre   Typ Bkd Fre  TOTAL:Max Bkd Fre

 Session - 08:30-12:30
   1  08:30-09:00    FU   0   1   NEW   1   0                        1    1    0
        Q257981          PIKE                     JANICE
   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



   Select     : ▮                      Continue on warning?  :
```

6.3. Service Group refer and book appointment <SBA>

This function will allow you to record a referral and book the appointment; it is a combination of SGR and FBA.

```
      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                          17/07/07 15:25 QAH
  ┌Name─────────────────────────────┐    ┌Valid Codes┐
┌─┤ TRIAL, MANNIE                   │   1  No Further Action
│ │                                 │   2  Book Appointment
│ │         Referral Diagnosis/        Severit│3  Add to Waiting List
│ │         Diagnosis Outcome
```

6.4. Appointment Enquiry <APE>

Appointment Enquiry will display all past and current Outpatient Waiting lists and appointments for the specified patient. Note Outpatient Waiting List Activity will remain at the top of the list. Appointments are displayed in date order with the most recent at the top.

Select either by moving the highlighted bar to the appropriate appointment and press <Return>, or type in selection number from left hand side of the screen and <Return>.
You will only be able to select those appointments for which you have booking access. On selection the Outpatient Waiting List or an Appointment details will be displayed on the screen i.e. transport and appointment comments.

If a cancelled appointment is selected you will also view cancellation details e.g. who cancelled and why.

```
  Select Appointment                    24/05/05 13:21 QAH
 ┌Name┐
┌┤ PIKE, JANICE                     PAS No. 06055932  ├
│
│  Status Department   Date    Day  Time  Clinic  Appt With Type
│  Site                        By   Date/Time        Rev Date/Time    CAB
│
│1  OP WL:  BAOWL   Con: BA      Spec: 710   Date Reqd: 04/2005    NEW
│                                            SRI 11/02/05 14:54
│2  OP WL:  ARENT2  Con: AR      Spec: 120   Date Reqd:           NR
│                                            DVJ 31/08/04 14:28
│3  OP WL:  PMPOFU  Con: PMP     Spec: 100   Date Reqd: 12/2004   FU
│   6 MONTH FU                               DVJ 24/06/04 11:50
│   WHATEVER
│4  OP WL:  MJWOWL  Con: MJW     Spec: 100   Date Reqd: 04/2004   NR
│                                            DVJ 27/10/04 13:08
│5  OP WL:  JDDOWL  Con: JDD     Spec: 800   Date Reqd:
│                                            DVJ 28/08/03 08:16
│6       PMAM      01/06/05 WED 08:30 RKAM    RK       NEW
```

```
  Appointment Details                          23/12/05 11:40 QAH
 ┌Name┐
┌┤ TRIAL, MANNIE                    PAS No. 01018604  ├

Appt Selected:  FRI  06/01/06  09:00-09:15    TRAIN7 TEMPLATE
   Report To:  INFORMATION TECH               TRAIN 7 CLINIC

Appt Type        :NEW    NEW
Transport        :11     NOT REQUIRED
Comment  :COMPLETE F548 FORM ON ARRIVAL
Appt Letter Options      :AV,BR
Category         :NHS    NHS PATIENT INFORMAL

Booked on        :23/12/2005 11:39      CAB :N

Patient's Choice :YES      Booking Type :1

Interpreter Req'd :NO    Language Reqd :
Attend/DNA
Disposal
Grade of Staff
```

6.5. Episode Enquiry <EPI>

If you wish to view Service Group details in EPI, select the appropriate SG REG. The referral details will be displayed on the screen; press <Return> and the appointments attached to that referral will be displayed. Unlike APE you will not be able to view appointment details.

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


1  SG REG        05/05/05 Cli:RK      SGp:IMT   NHS Q257981

   PREADM ***    29/04/05 DWB    140  QAH       NHS Q257981       DBOTH1

   OP REG        08/11/04 BA     710  SJH       NHS Q257981       BAOWL
```
```
<More available>
Select/Continue  :1
```

6.6. Revise appointment details <REA>

This function will allow the revision of the details of an appointment.

1. Select REA.

2. Search & select patient.

3. Select appointment.

4. Revise appointment as appropriate.

```
Appt Selected:  WED  01/06/05  08:30-09:00        TRAINING CLINICIAN
    Report To:  OUTPATIENTS DEPARTMENT QAH        TRAINING CLINIC


  Appt Type       :NEW   NEW
  Transport       :11    NOT REQUIRED
  Comment  :
  Appt Letter Options     :
  Category        :NHS   NHS PATIENT INFORMAL
  Booked on       :24/05/2005 13:13        CAB :N


  Patient's Choice :YES


  Interpreter Req'd :NO    Language Reqd :
```

6.7.   Delete appointment <DAP>

This function should ONLY be used when an appointment has been booked in error. If the appointment is no longer necessary it should be cancelled NOT deleted.

6.8.   Cancel appointment <CAP>

This function should be used when a patient's **future** appointment is no longer required and a replacement is not needed. If it is used because it is not possible to book the replacement at the present time, **CAB** should be used to book the replacement appointment when it becomes necessary. This will remove the cancelled appointment from the rebook report and the 'R' rebook code will show against the appointment, e.g. CNC PR.

If the patient cancels the appointment and they do not want a replacement, appropriate action should be taken this may involve the patient being given a future appointment or the referral being discharged.

1. Select CAP & find patient.

2. If required, update basic details.

3. Select appointment that you wish to cancel.

```
                    C a n c e l   A p p o i n t m e n t
     Select Appointment                         17/07/07 15:22 QAH
  ┌─┤Name├────────────────────────────────────────────────────────
  │ TRIAL, MANNIE                              PAS No. 01018604
  │
  │
 No  Status Department    Date    Day  Time  Clinic    ApptWith Type     CA
                        (*Breach)
     Site               Linked   By   Date/Time          Rev Date/Time
 ─────────────────────────────────────────────────────────────────────
 1           PODIATRY    24/07/07 TUE  08:30  RM        RM       NEW
     QAH                          DVJ 17/07/07 14:41   DVJ 17/07/07 15:22




 Select  :██
```

4. The appointment details screen will displayed (for you to note any services that may need re arranging)

```
                    C a n c e l   A p p o i n t m e n t
        Appointment Details                          17/07/07 15:22 QAH
      ┌Name├
      ┌ TRIAL, MANNIE                               PAS No. 01018604   ┤
     ┌
     Appt Selected:  TUE  24/07/07  08:30-09:30        RM
        Report To:  OUTPATIENTS DEPARTMENT QAH        RACHAEL MARSHALL


        Appt Type     :NEW   NEW
        Transport     :11    NOT REQUIRED
        Comment  :PATIENT TO COMPLETE DEPT SURVEY
        Appt Letter Options     :
        Category      :NHS   NHS PATIENT INFORMAL
        Booked on     :17/07/2007 14:41        CAB :N



        Interpreter Req'd :NO    Language Reqd :
                                                 <Press Return>: █

```

5. Complete the Cancellation details screen using the appropriate F9 codes.

```
                    C a n c e l   A p p o i n t m e n t
        Cancellation Details                         17/07/07 15:22 QAH
      ┌Name├
      ┌ TRIAL, MANNIE                               PAS No. 01018604   ┤
     Appt Selected:  TUE  24/07/07  08:30-09:30        RM
        Report To:  OUTPATIENTS DEPARTMENT QAH        RACHAEL MARSHALL

        Cancel By    :P   Patient              Date/Time   :17/07/07 15:22

        Reason Code  :PCA   PATIENT CANCELLED APPT

        Reason Text  :WORK COMMITMENTS

        Comment      :1ST CANCELLATION

        Canc Letter Options     :


      Enter?  :Y
```

6.9. Episode Enquiry view of a Cancelled Appointment

1. Select EPI & find patient.

2. Select the episode for your Service Group.

☛ **NOTE:** The Service Group referral Details will be displayed on the first screen followed by the appointments within the episode. No transport, letters or interpreter details are viewable within Episode Enquiry.

```
            E p i s o d e   E n q u i r y
   Service Group Referral Details          17/07/07 15:24 QAH
 ┌Name┐
 │ TRIAL, MANNIE                       PAS No. 01018604
 │
 Service Group      :IMT     INFORMATION AND TECH
 Lead Clinician     :RM      MARSHALL,RACHAEL
 Patient Category   :NHS     NHS PATIENT INFORMAL

 Referral Source    :GP      GENERAL PRACTITIONER

 Referral Type      :NEW
 Referral date/time :27/06/2007 09:00
 Priority           :ROUTINE

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

```
            E p i s o d e   E n q u i r y
   Appointments within Episode           17/07/07 15:24 QAH
 ┌Name┐
 │ TRIAL, MANNIE                       PAS No. 01018604
 │
   Status Department    Date      Day  Time   Clinic  Appt With Type
   Site                       By  Date/Time      Rev Date/Time    CAB

   CNC P  PODIATRY    24/07/2007 TUE  08:30  RM      RM        NEW
                                DVJ 17/07/07 14:41   DVJ 17/07/07 15:23
                          ** End of List **
```

Status Codes: CNC P – Cancelled by the Patient

6.10.   Appointment Enquiry view of a Cancelled Appointment.

1. Select APE & find patient.

The basic details screen will be displayed for you to confirm that you have selected the correct patient.

```
              A p p o i n t m e n t    E n q u i r y
   Basic Details  Confirm Patient                   18/07/07 13:44 QAH


 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
 Comment   :

                                                   <Press Return> █
```

The Select Appointment screen will display a list of appointments in date order that the patient has had throughout the Portsmouth Acute & Community sites. You will only be able to select the appointments that you have booking access for.

```
              A p p o i n t m e n t    E n q u i r y
   Select Appointment                            18/07/07 13:47 QAH
 ┌Name├─────────────────────────────────────────────────────────┐
 ├ TRIAL, MANNIE                          PAS No. 01018604        ┤
 ├──────────────────────────────────────────────────────────────┤
    Status Department    Date    Day  Time   Clinic  Appt With Type
    Site                         By   Date/Time        Rev Date/Time   CAB

 █1  CNC P  PODIATRY     24/07/07 TUE  08:30  RM       RM        NEW    █
    QAH                          DVJ 17/07/07 15:27   DVJ 17/07/07 15:27
 2         Outpatients   20/07/07 FRI  08:00  ITAJ     ITAJ      NEW
    QAH                          DVJ 18/07/07 13:39




    Select  :█
 └──────────────────────────────────────────────────────────────┘
```

2. The Appointment Details screen within APE will display information that is not visible within episode enquiry.

```
        A p p o i n t m e n t   E n q u i r y
  Display Appointment                    17/07/07 15:23 QAH
┌Name┐
│TRIAL, MANNIE                          PAS No. 01018604 │
└                                                        ┘
Appt Selected:  TUE  24/07/07  08:30-09:30      RM
   Report To:  OUTPATIENTS DEPARTMENT QAH       RACHAEL MARSHALL

Cancel By    P   Patient              Date/Time    17/07/2007 15:22

Reason Code   PCA   PATIENT CANCELLED APPT

Reason Text   WORK COMMITMENTS

Comment       1ST CANCELLATION

Canc Letter Options



                                       <Press Return> ▌
```

```
        A p p o i n t m e n t   E n q u i r y
  Appointment Details                    17/07/07 15:23 QA
┌Name┐
│TRIAL, MANNIE                          PAS No. 01018604 │
└                                                        ┘
Appt Selected:  TUE  24/07/07  08:30-09:30      RM
   Report To:  OUTPATIENTS DEPARTMENT QAH       RACHAEL MARSHALL



Appt Type     :NEW   NEW
Transport     :11    NOT REQUIRED
Comment  :PATIENT TO COMPLETE DEPT SURVEY
Appt Letter Options      :
Category      :NHS   NHS PATIENT INFORMAL
Booked on     :17/07/2007 14:41        CAB :N



Interpreter Req'd :NO    Language Reqd :
```

3. The Display Appointment screen within APE will display information as to why the appointment cancellation has occurred.

6.11. Reinstate cancelled appointment <RCA>

This function should be used when a cancelled appointment needs to be reinstated. It is the only way to 'get back' an appointment that has been cancelled; it cannot be done in FBA. **However**, this should be used with **caution**, as it will reinstate an appointment regardless of whether the appointment slot has been allocated to another patient.

1. Select RCA & find patient.
2. Revise the basic details if appropriate to do so.
3. Select the Appointment to be reinstated.
4. The Appointment Details Screen will be displayed, followed by the Cancellation details screen.
    You may need to rebook transport etc if this was required.

```
        R e i n s t a t e   C a n c e l l e d   A p p o i n t m t
  Cancellation Details                   19/07/07 11:03 QAH
┌Name┐
│TRIAL, MANNIE                          PAS No. 01018604 │
└                                                        ┘
Appt Selected:  TUE  24/07/07  08:30-09:30      RM
   Report To:  OUTPATIENTS DEPARTMENT QAH       RACHAEL MARSHALL
Cancel By    P   Patient              Date/Time    17/07/2007 15:27

Reason Code   PCA   PATIENT CANCELLED APPT

Reason Text   WORK COMMITMENTS

Comment       PT TO RING BACK FOR NEW APPT

Canc Letter Options



Enter?    :YES
   *** Appointment Reinstated ***          ─────<Press Return> ▌
```

6.12. Cancel and rebook appointment <CAB>

Use this function to cancel a patient's **future** appointment when it is no longer 'convenient' and a replacement is required. You will be required to record who is cancelling the appointment e.g. P – Patient or H – Hospital and also the reason for the cancellation.

1. Complete Steps 1-5 of CAP (Cancel Appointment).

```
        C a n c e l   a n d   R e b o o k   A p p o i n t m e n t
     Select Appointment                              19/07/07 11:04 QAH
   ┌Name├
   │ TRIAL, MANNIE                                PAS No. 01018604      │
   │                                                                   │
   │                                                                   │
   │No  Status Department      Date    Day  Time  Clinic   ApptWith Type    CAB│
   │                          (*Breach)                                │
   │     Site              Linked  By    Date/Time          Rev Date/Time│
   │-------------------------------------------------------------------│
   │1           PODIATRY     24/07/07  TUE  08:30  RM      RM       NEW │
   │     QAH                          DVJ 17/07/07 15:27  DVJ 19/07/07 11:03│
   │2           Outpatients  20/07/07  FRI  08:00  ITAJ    ITAJ     NEW │
   │     QAH                          DVJ 18/07/07 13:39              │
   │                                                                   │
   │                                                                   │
   │                                                                   │
   │                                                                   │
   │ Select  : █                                                       │
   └───────────────────────────────────────────────────────────────────┘
```

2. After you have cancelled the appointment you will be presented with the appointment details screen to rebook the appointment.

```
        C a n c e l   a n d   R e b o o k   A p p o i n t m e n t
     Appointment Details                             19/07/07 11:08 QAH
   ┌Name├
   │ TRIAL, MANNIE                                PAS No. 01018604      │
   │                                                                   │
   │ Status   Department   Date     Day  Time   Clinic   Appt With Type│
   │                                By   Date/Time        Rev Date/Time│
   │ -------  ----------   -------- ---  -----  --------  --------- ----│
   │                                                                   │
   │ CNC H    PODIATRY     24/07/07 TUE  08:30  RM        RM       NEW │
   │                                DVJ  17/07/07 15:27  DVJ 19/07/07 11:08│
   │          Outpatients  20/07/07 FRI  08:00  ITAJ      ITAJ     NEW │
   │                                DVJ  18/07/07 13:39               │
   │                                                                   │
   │Display more appointments? :                                       │
   │ Clinic    :RM        RACHAEL MARSHALL                             │
   │ Clinician :RM        RM                                           │
   │ Appt Type :NEW       NEW                        Urgent ? :        │
   │ Day       :          From Time :                To Time  :        │
   │ Date/Time :240707                                                 │
   └───────────────────────────────────────────────────────────────────┘
```

3. Select the timeslot (s) required.

```
      C a n c e l   a n d   R e b o o k   A p p o i n t m e n t
         Clinician Timeslot Display              19/07/07 11:10 QAH
  ┌Name┐
  │ TRIAL, MANNIE                               PAS No. 01018604  │

Clinic   RM     Clinician RM           Appt Type NEW    TUE 24/07/07
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      :6,7             Continue on warning?  :
```

4. Complete the Appointment Details screen.

```
      C a n c e l   a n d   R e b o o k   A p p o i n t m e n t
         Selected Appointment Details           19/07/07 11:11 QAH
  ┌Name┐
  │ TRIAL, MANNIE                               PAS No. 01018604  │

Appt Selected:  TUE  24/07/07  11:00-12:00      RM
    Report To:  OUTPATIENTS DEPARTMENT QAH        RACHAEL MARSHALL




   Appt Type      :NEW   NEW
   Transport      :11    NOT REQUIRED
   Comment   :PATIENT TO COMPLETE DEPT SURVEY
   Appt Letter Options       :
   Category       :NHS   NHS PATIENT INFORMAL
   Booked on      :19/07/2007 11:11        CAB :N



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

6.13. Appointment Enquiry view of a cancelled and rebooked appointment

```
          A p p o i n t m e n t   E n q u i r y
   Select Appointment                          19/07/07 14:42 QAH
 ┌Name┐
 ┤ TRIAL, MANNIE                            PAS No. 01018604  ├

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

1          PODIATRY    24/07/07  TUE  11:00  RM        RM      NEW
   QAH                          DVJ  19/07/07 14:42
2  CNC HR PODIATRY    24/07/07  TUE  08:30  RM        RM      NEW
   QAH                          DVJ  19/07/07 14:41   DVJ 19/07/07 14:42
3         Outpatients  20/07/07  FRI  08:00  ITAJ      ITAJ    NEW
   QAH                          DVJ  18/07/07 13:39




   Select  :██
```

Status Code:

- **CNC H** – Cancelled by Hospital. (24/07/07 8:30)

- **CNC HR** – Cancelled by Hospital, Rebooked. (24/07/07 11:00)

6.14. Telephone book appointment <TBA>

This function can be used when dealing with telephone booking. The Clinic and the appointment is selected first and then allocated to the patient.

```
      T e l e p h o n e   B o o k   A p p o i n t m e n t
      INFORMATION AND TECH Appointment Details        19/07/07 11:14 QAH

   Clinic     :RM         RACHAEL MARSHALL
   Clinician  :RM         RM
   Appt Type  :NEW        NEW                     Urgent ? :
   Day        :              From Time :          To Time  :
   Date/Time  :270707    ██████████
```

1. Enter the Clinic that you wish to book the patient to.
2. Find the patient.

```
      T e l e p h o n e   B o o k   A p p o i n t m e n t
      Patient Selection Details                     19/07/07 11:16 QAH

                        ┌Select Patient┐
   PAS Number      :              Casenote No   :
   NHS Number      :              Old NHS No    :
   Military Number :
   Surname         :ANON
   Forenames       :A

   Date of Birth   :01/01/1970   37Y      Age   :       Years +/-  :3

   Sex             :M                Postcode   :
```

3. The Display Appointment screen will be displayed followed but the Selected Appointment Details-complete the appt type, transport, comment etc fields.

```
            T e l e p h o n e   B o o k   A p p o i n t m e n t
       Selected Appointment Details                    19/07/07 11:17 QAH
     ┌─┤Name├─────────────────────────────────────────────────────────────┐
     │ ANON, ARTHUR                                  PAS No. 01017026       │
     └───────────────────────────────────────────────────────────────────┘
   Appt Selected:  FRI  27/07/07  08:30-09:30        RM
       Report To:  OUTPATIENTS DEPARTMENT QAH        RACHAEL MARSHALL




       Appt Type      :NEW   NEW
       Transport      :11    NOT REQUIRED
       Comment  :BLOOD TEST ON ARRIVAL
       Appt Letter Options     :
       Category       :NHS   NHS PATIENT INFORMAL
       Booked on      :19/07/2007 11:17        CAB :N



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

4. A dialogue box will be displayed confirming the appointment date & time. You be asked whether you wish to book more appointments for this patient.

```
   ┌──────────────────────────────────────────────────────┐
   │ ** Appointment Booked  27/07/07  08:30-09:30     **   │
   │ Book more appointments for this patient ? :NO         │
   │                                                       │
   │                                  <Return> :           │
   └──────────────────────────────────────────────────────┘
```

7. MANAGING DISCHARGES

7.1. Service Group Discharge <SGD>

This function will be used to discharge a Service Group Referral when a patient episode of care has come to an end.

Select the appropriate SG REG, enter the appropriate details e.g. discharge reason. The episode status will now be shown as SG DSCH.

1. Select SGD and find the patient to be discharged.

2. Select the Service Group Episode to be discharged.

3. Enter the appropriate discharge reason.

```
                    S e r v i c e   G r o u p   D i s c h a r g e
     Service Group Discharge                      19/07/07 11:39 QAH
  ┌─Name├─────────────────────────────────────────────────────
  │ TRIAL, MANNIE                              PAS No. 01018604  │
  │                                                              │
  │ Discharge Date/Time :16/07/07 09:30                          │
  │ Reason              :DISC  DISCHARGE FROM CLINIC             │
  │           Discharge Diagnosis/            Severity           │
  │           Discharge Diagnosis Outcome                        │
  │ Primary    :1111  DIAGNOSIS DESCRIPTION    :R     ROUTINE    │
  │            :                                                 │
  │ Subsidiary :                        :                        │
  │            :                                                 │
  │ Secondary  :                        :                        │
  │            :                                                 │
  │            :                        :                        │
  │            :                                                 │
  │                                                              │
  │ Discharge Outcome  :1DIS DISCHARGE                           │
  │                                                              │
  │ Enter?  :Y                                                   │
  └──────────────────────────────────────────────────────────────
```
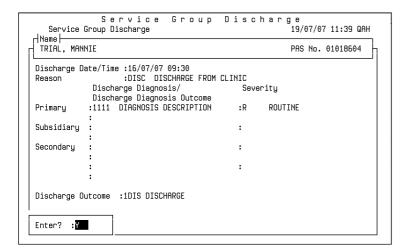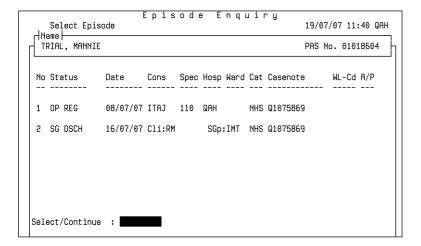
👉 **NOTE:** The episode status in Episode Enquiry will now be shown as SG DSCH.

```
                    E p i s o d e   E n q u i r y
     Select Episode                               19/07/07 11:40 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 DSCH     16/07/07 Cli:RM      SGp:IMT  NHS Q1075869     │
  │                                                              │
  │                                                              │
  │                                                              │
  │                                                              │
  │                                                              │
  │ Select/Continue  :                                           │
  └──────────────────────────────────────────────────────────────
```

7.2.   Delete service group discharge <DSD>

This function can be used to delete the discharge from a service group referral. The episode status will change from SG DSCH to SG REG allowing appointments to be made against the referral.
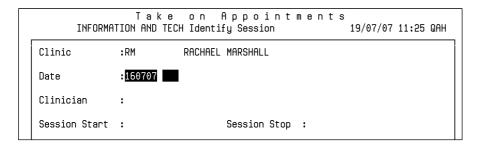
8. PAST APPOINTMENTS

8.1. Take on appointment <TOA>

This function will allow the booking of a patient onto a clinic for the past, present or future. It is the only way to record a patient who has attended a clinic for a past date.
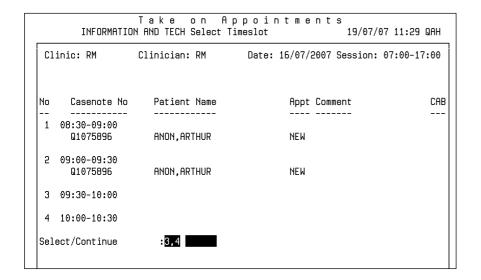
On selecting this function you will be required to enter the clinic and date you wish to add a patient to. Select appropriate time, find patient, select appropriate episode, complete appointment details screen.

If an episode is not selected this function will proceed to create the referral, to which the appointment will be attached.

1. Select TOA and enter the details of the clinic which you wish to book you patient to.

```
                    T a k e   o n   A p p o i n t m e n t s
          INFORMATION AND TECH Identify Session              19/07/07 11:25 QAH

    Clinic        :RM        RACHAEL MARSHALL

    Date          :160707

    Clinician     :

    Session Start :              Session Stop  :
```

2. Select the timeslots that you are booking the patient to.

```
                    T a k e   o n   A p p o i n t m e n t s
          INFORMATION AND TECH Select Timeslot               19/07/07 11:29 QAH

   Clinic: RM        Clinician: RM        Date: 16/07/2007 Session: 07:00-17:00


  No     Casenote No    Patient Name         Appt Comment              CAB
  --     ----------     ------------         ---- -------              ---
  1  08:30-09:00
       Q1075896         ANON,ARTHUR          NEW

  2  09:00-09:30
       Q1075896         ANON,ARTHUR          NEW

  3  09:30-10:00

  4  10:00-10:30

  Select/Continue      :3,4
```

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3. Search for you patient.

```
                T a k e   o n   A p p o i n t m e n t s
       Patient Selection Details                    19/07/07 11:32 QAH

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

 Date of Birth    :01/01/1986  21Y      Age   :        Years +/-   :3

 Sex              :M                     Postcode   :
```

4. Select the patient.

```
                T a k e   o n   A p p o i n t m e n t s
       Matching Patient Records  (Name Search)      19/07/07 11:32 QAH

  Seq  PAS No.  Name              Sex  DOB      Dth   Address

   1   01018604  TRIAL             M   01/01/1986    1 Westways
                 MANNIE                              HAVANT
  (End of List)




 Select Patient, press <P> for previous page, or <Return> to continue  : ■
```
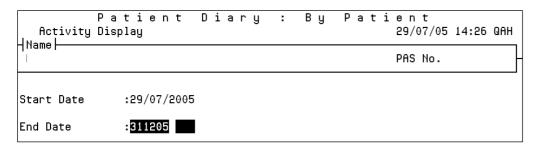
5. Complete the appointment details screen.

```
                T a k e   o n   A p p o i n t m e n t s
       Appointment Take On                          19/07/07 11:33 QAH
 ┌Name├
 │ TRIAL, MANNIE                                PAS No. 01018604
 │
 Appt Selected:  MON  16/07/07  09:30-10:30       RM
    Report To:  PHYSIOTHERAPY QAH                 RACHAEL MARSHALL



   Appt Type      :NEW    NEW
   Transport      :11     NOT REQUIRED
   Comment   :XRAY REQ
   Category       :NHS    NHS PATIENT INFORMAL
   Booked on      :16/07/2007 09:30        CAB :N



   Interpreter Req'd :NO    Language Reqd :
   Attend/DNA         :ATT   Attended              DNA Reason :

  Enter?  :Y ■
```

9. ENQUIRY FUNCTIONS
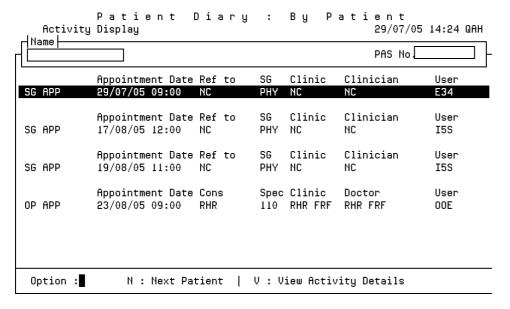
9.1. Patient Diary: By Patient <PE>

This function will allow you to select a Patient to view future Contacts and Appointments.

1. Select PE

2. Search & select for the patient whose activity you wish to view.

3. Enter the required the start date, (from today onwards).

4. Enter the required end date.

```
                P a t i e n t   D i a r y   :   B y   P a t i e n t
    Activity Display                              29/07/05 14:26 QAH
 ┤Name├
  |                                               PAS No.


Start Date      :29/07/2005

End Date        :311205  ▮▮
```

5. The Patients' Appointment & Contact are displayed in date order. You may move to the next Patient by typing N at the Option field or V to view the Activity Details for the highlighted appointment.

```
                P a t i e n t   D i a r y   :   B y   P a t i e n t
    Activity Display                              29/07/05 14:24 QAH
 ┌Name├
  │                                            PAS No└_____┘
  │ ┌─────────────┐
  │ └─────────────┘
            Appointment Date Ref to    SG    Clinic    Clinician      User
  SG APP    29/07/05 09:00   NC        PHY   NC        NC             E34

            Appointment Date Ref to    SG    Clinic    Clinician      User
  SG APP    17/08/05 12:00   NC        PHY   NC        NC             I5S

            Appointment Date Ref to    SG    Clinic    Clinician      User
  SG APP    19/08/05 11:00   NC        PHY   NC        NC             I5S

            Appointment Date Cons      Spec  Clinic    Doctor         User
  OP APP    23/08/05 09:00   RHR       110   RHR FRF   RHR FRF        OOE




    Option :▮       N : Next Patient  |  V : View Activity Details
```

9.2.   Patient Diary: By List <PEL>

This option will allow you to create a cumulative list of patients for a nominated clinician, which you will then be able to select a Patient from the list to view individual appointment/ contacts.

1. Select PEL

2. Select Option Number: 9 to view a Service Group List

```
                  P a t i e n t   D i a r y  :  B y   L i s t
          Selection List                          29/07/05 14:27 QAH

          Inpatients              1  By Ward
                                  2  By Consultant
                                  3  By Specialty

          Pre-Admitted Patients   4  By Ward
                                  5  By Consultant

          Discharged Inpatients   6  By Ward
                                  7  By Consultant

          Out-Patients            8  By Clinic Session

          Service Group           9  By Clinic Session

          Single Patient          P  Search PMI

              Select Option Number  :9
```
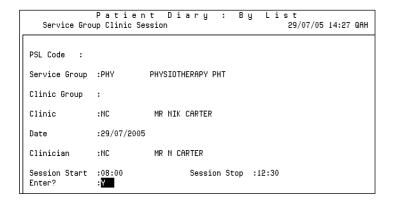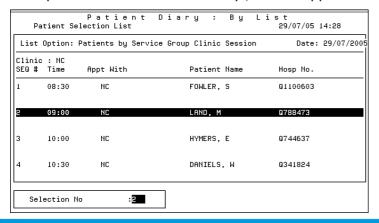
3. Use super help to complete the relevant fields.

```
                  P a t i e n t   D i a r y  :  B y   L i s t
          Service Group Clinic Session                29/07/05 14:27 QAH


          PSL Code   :

          Service Group :PHY        PHYSIOTHERAPY PHT

          Clinic Group  :

          Clinic        :NC          MR NIK CARTER

          Date          :29/07/2005

          Clinician     :NC          MR N CARTER

          Session Start :08:00            Session Stop  :12:30
          Enter?            :Y
```
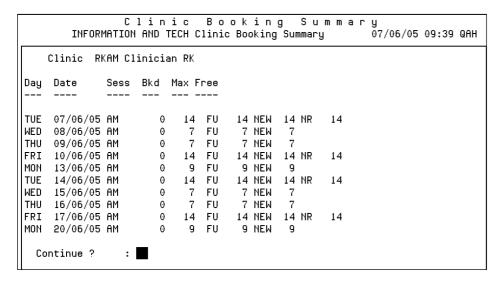
4. Patients are displayed in time order for the specified date. Select the required Patient by the sequence number to view today / future appointment/contacts.

```
                  P a t i e n t   D i a r y  :  B y   L i s t
          Patient Selection List                      29/07/05 14:28

          List Option: Patients by Service Group Clinic Session     Date: 29/07/2005

          Clinic : NC
          SEQ #  Time     Appt With          Patient Name      Hosp No.

          1      08:30    NC                 FOWLER, S         Q1100603

          2      09:00    NC                 LAND, M           Q788473

          3      10:00    NC                 HYMERS, E         Q744637

          4      10:30    NC                 DANIELS, W        Q341824


              Selection No          :2
```

9.3. Clinic booking summary <CBK>

This function can be used to display the present booking status summary for a selected clinic from a specified date. CBK can be used to view the clinic lag, for instance, how long would a patient have to wait for the next free FU appointment.

```
             C l i n i c    B o o k i n g    S u m m a r y
        INFORMATION AND TECH Clinic Booking Summary      07/06/05 09:39 QAH

     Clinic   RKAM Clinician RK

Day  Date       Sess  Bkd  Max Free
---  ----       ----  ---  --- ----

TUE  07/06/05 AM       0    14  FU    14 NEW  14 NR    14
WED  08/06/05 AM       0     7  FU     7 NEW   7
THU  09/06/05 AM       0     7  FU     7 NEW   7
FRI  10/06/05 AM       0    14  FU    14 NEW  14 NR    14
MON  13/06/05 AM       0     9  FU     9 NEW   9
TUE  14/06/05 AM       0    14  FU    14 NEW  14 NR    14
WED  15/06/05 AM       0     7  FU     7 NEW   7
THU  16/06/05 AM       0     7  FU     7 NEW   7
FRI  17/06/05 AM       0    14  FU    14 NEW  14 NR    14
MON  20/06/05 AM       0     9  FU     9 NEW   9

   Continue ?     : █
```

NOTE: If there is a minus sign next to any of the free slots it indicates that this appointment type is overbooked. If there is an S after the Sess ie PMS this indicates a suspended clinic. If there is a C after the Sess ie PMC this indicates a cancelled clinic.

9.4. Clinic enquiry <CEQ>

This function will display, an up to date list of the names and details of patients attending the specified clinic for the specified day.

```
                    C l i n i c   E n q u i r y
        INFORMATION AND TECH Appointment Booking Display    07/06/05 09:43 QAH

  Clinic: MM        Clinician: MM        Date: 07/06/2005 Session: 08:00-17:00


        Casenote No      Patient Name          Appt Comment              CAB
        -----------      ------------          ---- -------              ---
     08:30-09:00
       Q928360           HEATH,BELINDA           FU

     09:00-09:30
       Q516889           CARER,CATLIN            FU

     09:30-10:00
       Q478956           WILLS,BRUCE             FU




                                                 <Press Return> ▉
```

9.5. Cancel clinic enquiry & suspended clinic enquiry <CCE> & <SCE>

The function will show you any clinics cancelled or suspended for the date entered. If you have booking access you are able to select and view the individual clinics. This will show any patient rebooked to the clinic at the time of cancellation.
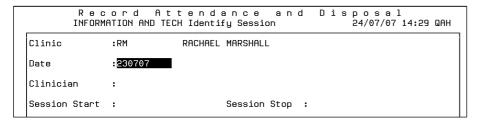
```
                C a n c e l l e d   C l i n i c   E n q u i r y
          INFORMATION AND TECH Cancelled Clinic Enquiry       07/06/05 10:48 QAH

  Date           :07/06/2005

  No  Clinic    Clinician Session      Reason For Cancellation        Canc Pts
  --  ------    --------- -------      -----------------------        --------

   1  MM        MM        08:00-17:00  NO COVER                          4
                                       CAL   CLINICIAN ON ANNUAL LEAVE
   2  RKAM      RK        07:00-11:45  NO COVER                          0
                                       CAS   CLINICIAN ON SICK LEAVE







  Select/Continue    :▉▉▉▉▉▉
```
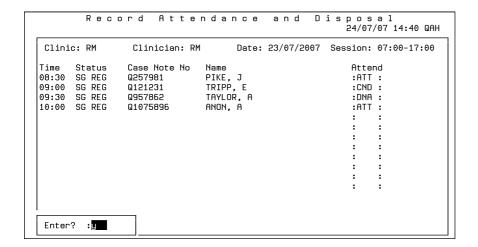
10. AFTER THE CLINIC

10.1. Record attendance and disposal <AAD>

This function is used to record the outcome of each patient's appointment for the nominated clinic. It will indicate whether the patients Attended (ATT), Did Not Attend (DNA) or Cancel on the Day (CND).
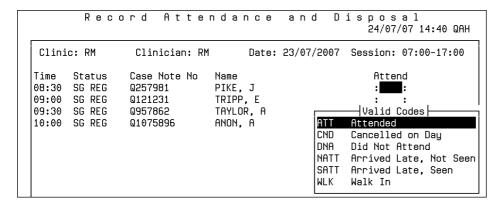
1. Enter the clinic code and date that you are recording the data for.

```
          R e c o r d   A t t e n d a n c e   a n d   D i s p o s a l
          INFORMATION AND TECH Identify Session              24/07/07 14:29 QAH

Clinic          :RM          RACHAEL MARSHALL

Date            :230707

Clinician       :

Session Start  :               Session Stop  :
```

2. The screen will display the patients in appointment time order.

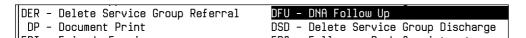3. You will now be required to record what happened to each patient.

```
          R e c o r d   A t t e n d a n c e   a n d   D i s p o s a l
                                                    24/07/07 14:40 QAH

  Clinic: RM       Clinician: RM       Date: 23/07/2007  Session: 07:00-17:00

 Time   Status    Case Note No   Name                    Attend
 08:30  SG REG    Q257981        PIKE, J                 :ATT :
 09:00  SG REG    Q121231        TRIPP, E                :CND :
 09:30  SG REG    Q957862        TAYLOR, A               :DNA :
 10:00  SG REG    Q1075896       ANON, A                 :ATT :
                                                         :    :
                                                         :    :
                                                         :    :
                                                         :    :
                                                         :    :
                                                         :    :
                                                         :    :
                                                         :    :

    Enter?  :y
```

4. Proceed through the patients adding the correct data. Enter YES at the bottom of the screen to save your entries.
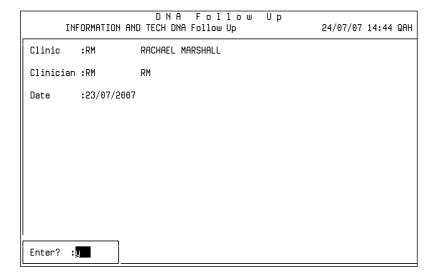
```
             R e c o r d   A t t e n d a n c e   a n d   D i s p o s a l
                                                        24/07/07 14:40 QAH

   Clinic: RM        Clinician: RM        Date: 23/07/2007  Session: 07:00-17:00

   Time    Status     Case Note No    Name                    Attend
   08:30   SG REG     Q257981         PIKE, J                 :███:
   09:00   SG REG     Q121231         TRIPP, E                :    :
   09:30   SG REG     Q957862         TAYLOR, A          ┤Valid Codes├
   10:00   SG REG     Q1075896        ANON, A           │ATT   Attended          │
                                                         │CND   Cancelled on Day   │
                                                         │DNA   Did Not Attend     │
                                                         │NATT  Arrived Late, Not Seen│
                                                         │SATT  Arrived Late, Seen  │
                                                         │WLK   Walk In            │
```

10.2. DNA follow up <DFU>

This function is used to process patient appointments with an attendance status of DNA and CND. It

```
┤DER - Delete Service Group Referral    DFU - DNA Follow Up
 DP - Document Print                    DSD - Delete Service Group Discharge
```
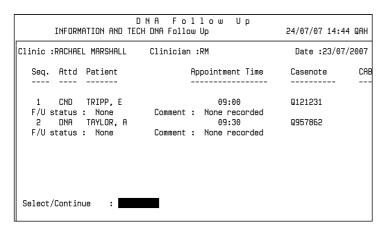
is possible to either book another appointment or send a letter to the GP.

1. Select DFU.
2. Enter the clinic code and date that you are recording the data for.

```
                       D N A   F o l l o w   U p
             INFORMATION AND TECH DNA Follow Up           24/07/07 14:44 QAH

   Clinic    :RM          RACHAEL MARSHALL

   Clinician :RM          RM

   Date      :23/07/2007

   Enter?  :y█
```

3. Select patient by sequence number.

```
                        D N A   F o l l o w   U p
              INFORMATION AND TECH DNA Follow Up          24/07/07 14:44 QAH

Clinic :RACHAEL MARSHALL     Clinician :RM               Date :23/07/2007

   Seq.  Attd  Patient              Appointment Time    Casenote      CAB
   ----  ----  -------              ----------------    ----------    ---

    1    CND   TRIPP, E                   09:00         Q121231
  F/U status :  None       Comment :  None recorded
    2    DNA   TAYLOR, A                  09:30         Q957862
  F/U status :  None       Comment :  None recorded




     Select/Continue     : ▇▇▇▇▇▇▇
```

4. The screen will display appointment details requiring optional Comment & 'Action' fields to be completed. Select either Rebook Appointment or GP Letter.

```
                        D N A   F o l l o w   U p
              INFORMATION AND TECH DNA Details            24/07/07 14:44 QAH
   ┌Name┤                                           ┌Valid Codes┤
   ┌ TRIPP, ERIC                                    D  GDP letter
   ┌                                                G  GP letter
   Appt Selected:  MON  23/07/07  09:00-09:30  RM   R  Rebook appointment
      Report To:  PHYSIOTHERAPY QAH           RACHAEL


     Appt Type       :NEW    NEW
     Transport       :11     NOT REQUIRED
     Comment  :
     Appt Letter Options      :
     Category        :NHS    NHS PATIENT INFORMAL
     Booked on       :17/07/2007 09:00       CAB :N



     Interpreter Req'd :NO    Language Reqd :
     Attend/DNA         CND    ┌────────────────────────────────┐
                               │  Comment     :PATIENT UNWELL    │
                               │  Action      :▇                 │
```

You will then be taken through the screens as in FBA to allocate your rebook appointment.

If you choose to select the GP letter option, please remember you will need to record that you are discharging the patients' episode of care in SGD, Service Group Discharge.

5. On completion of the total clinic all the F/U Status fields will be completed.

```
                    D N A   F o l l o w   U p
         INFORMATION AND TECH DNA Follow Up            24/07/07 14:47 QAH

Clinic :RACHAEL MARSHALL     Clinician :RM                 Date :23/07/2007

   Seq.  Attd  Patient              Appointment Time    Casenote      CAB
   ----  ----  -------              ----------------    ----------    ---


    1    CND   TRIPP, E                  09:00          Q121231
   F/U status :  Rebooked     Comment :   PATIENT UNWELL
    2    DNA   TAYLOR, A                 09:30          Q957862
   F/U status :  GP letter    Comment :   1ST DNA




   Select/Continue     :█████████
```

11. CODING

11.1. SG Code Clinic Attendance <CCA>

This function will enable you to record activity codes against patients visits for statistical purposes. This may be entered by selecting the clinic by date to select the individual patient's that you which to code.

1. Complete the fields as shown below, with your appropriate data.   Use your super help (F9) & help (F8) keys if required. A list of Patients who have attended the clinic will be displayed.

```
                S G   C o d e   C l i n i c   A t t e n d a n c e
          INFORMATION AND TECH Code Clinic Attendance      07/06/05 10:55 QAH

Clinic        :MM        M MARTIN

Date          :070605 ▆

Clinician     :

Session Start :                  Session Stop :

```

2. Select the patient and record data on the following screens as agreed by your department and ICT Projects to produce the relevant Statistical information required.

```
                S G   C o d e   C l i n i c   A t t e n d a n c e
          INFORMATION AND TECH Select Patient              26/07/07 14:13 QAH

Clinic :RM        Clinician :RM       Date :23/07/2007 Session: 07:00-17:00


No  Attnd Name                       Time Casenote No

1        PIKE, JANICE                08:30 Q257981     Not Recorded
2        ANON, ARTHUR                09:00 Q1075896    Not Recorded
3        TAYLOR, ALBERTA             09:30 Q957862     Not Recorded
4        TRIPP, ERIC                 10:00 Q121231     Not Recorded











  Select  : ▆        C : Change Selection Criteria        Q : Quiet
```
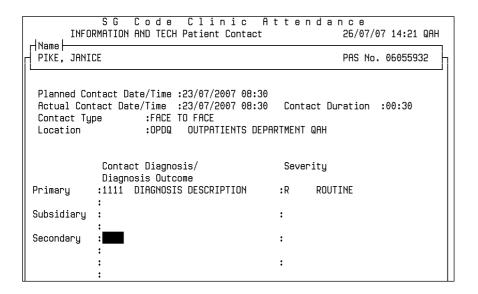
Select: Enter the number of the patient you wish to select.

C: Change Selection Criteria.   This will return you to the previous screen, where you may change the clinic details.
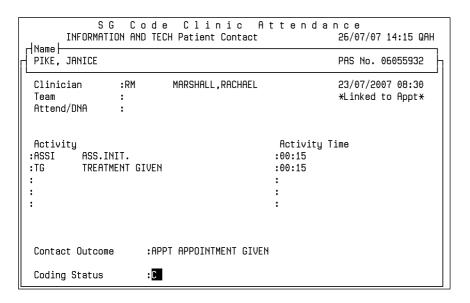
Q: Quiet   This will visual obscure the listed patient until you retype Q and enter

3. Patient who attended is a FACE TO FACE contact Type.

```
          S G   C o d e   C l i n i c   A t t e n d a n c e
         INFORMATION AND TECH Patient Contact          26/07/07 14:21 QAH
    ┌─Name├─
    │ PIKE, JANICE                             PAS No. 06055932
    │

     Planned Contact Date/Time :23/07/2007 08:30
     Actual Contact Date/Time  :23/07/2007 08:30   Contact Duration  :00:30
     Contact Type         :FACE TO FACE
     Location             :OPDQ   OUTPATIENTS DEPARTMENT QAH


               Contact Diagnosis/              Severity
               Diagnosis Outcome
     Primary   :1111  DIAGNOSIS DESCRIPTION    :R      ROUTINE
               :
     Subsidiary :                              :
               :
     Secondary :▇▇▇                            :
               :
               :                               :
               :
```

4. The Activity will reflect the assessment and / or treatment. It the activity was not possible due to the patient not presenting please select the activity code to reflect this.

```
          S G   C o d e   C l i n i c   A t t e n d a n c e
         INFORMATION AND TECH Patient Contact          26/07/07 14:15 QAH
    ┌─Name├─
    │ PIKE, JANICE                             PAS No. 06055932
    │
     Clinician      :RM       MARSHALL,RACHAEL        23/07/2007 08:30
     Team           :                                *Linked to Appt*
     Attend/DNA     :


     Activity                         Activity Time
     :ASSI     ASS.INIT.                   :00:15
     :TG       TREATMENT GIVEN             :00:15
     :                                     :
     :                                     :
     :                                     :



     Contact Outcome      :APPT APPOINTMENT GIVEN

     Coding Status        :▇C▇
```

12. 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.

12.1. 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.

12.2. 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.

12.3. 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

13.   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

14.   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

15. VERSION CONTROL/LOG

Manual Version	V.N	
Date	[Month] 2008	
Revisions		**Page**