

Add a Referral and Schedule an Appointment – New Patient using SchapptBook

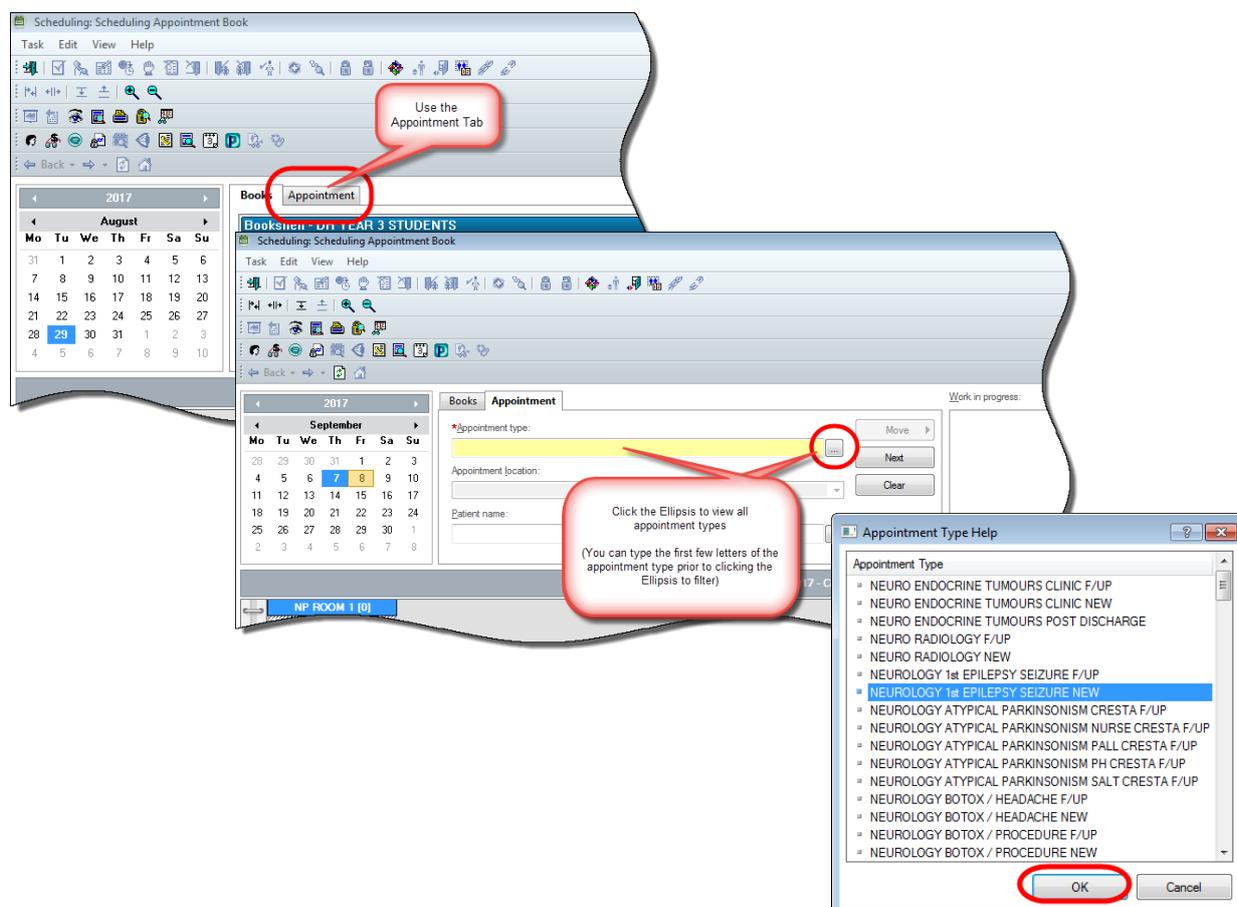
Scenario

In this example we will be adding a GP referral, giving the patient an appointment using **SchapptBook** for a patient new to our Trust.

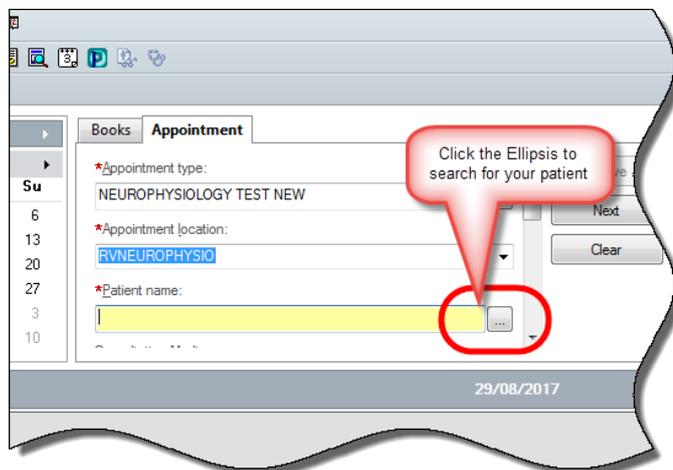
Instruction

Adding the Referral

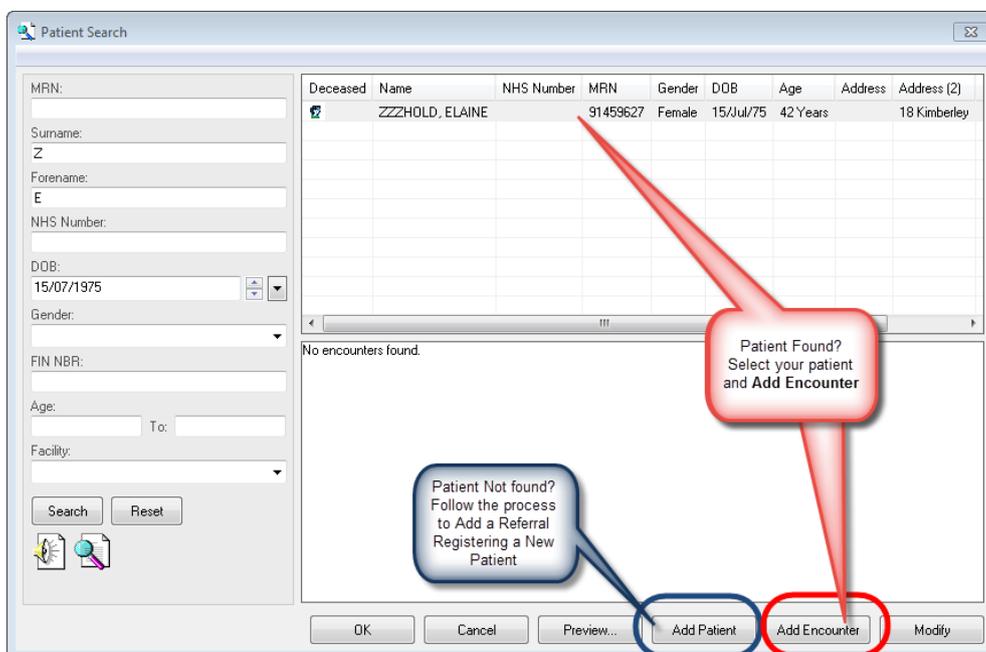
1. Click the **Appointment** tab to add the referral with an appointment
2. Complete the **Appointment Type** field – click the **Ellipsis** to view all appointment types for your service (note you can type the first few letters so that you see a filtered list of appointment types)
3. Select the correct **Appointment Type** and click **OK**



- Click the **Ellipsis Button** for **Patient Name** to open the search window where search parameters can be entered

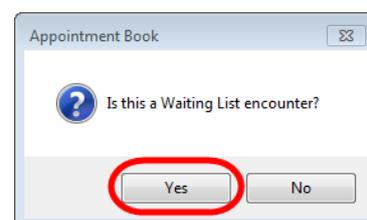


- Search for your patient. If you do not have an **NHS number or MRN number**, enter your **patient's initials and DOB**; clicking **Search** to look for your patient – please see the guide Search Techniques for tips on correct search methods. Click the **Add Encounter** button if your patient is found, if not Add Patient and follow this guide to complete demographics – you may need to refer to the How To guide Add or Update Patient Demographics

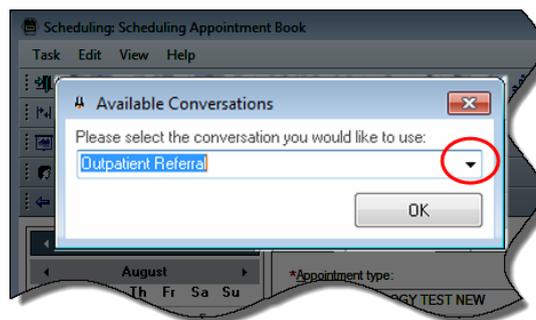


DO NOT REGISTER A NEW PATIENT UNLESS YOU HAVE FOLLOWED THE CORRECT SEARCHING TECHNIQUE (See How To guide for Search Techniques)

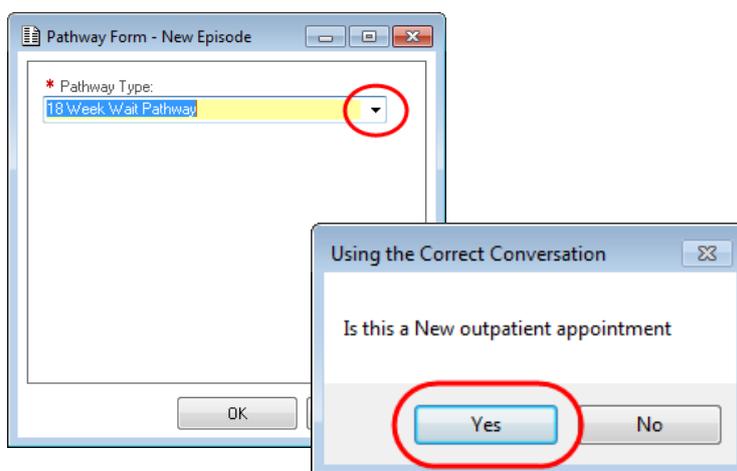
- Select **Yes** to the question **Is this a Waiting List Encounter** (even though you are scheduling an appointment at the next step)



7. Select **Outpatient Referral** from the dropdown list and **OK**



8. This will open the Pathway Type dialogue – select **18 week Pathway** from the dropdown, click **OK** - *Note if you are adding a maternity referral, please select the Maternity pathway*
9. **Yes** this is a New outpatient appointment (as opposed to a follow up appointment)



10. A warning will ask if you are absolutely certain this is a new patient you are registering. If you are **uncertain that this is a new patient, select Yes** - please refer to the How To Guide “Search Techniques” and search for your patient again. If however, you are **certain this is a new patient that hasn’t been seen at this Trust in the past, select No**



The Outpatient Referral window will open (you have been temporarily taken into PM Office to add the Referral details. Once you have added the Referral details, SchapptBook will re-open) – **COMPLETE THE REFERRAL DETAILS**



All yellow fields are **Mandatory fields**. You must complete these fields in order to add the referral.

However, you may not know some of the details at this stage (for example ethnicity and UK residency. Setting these to unknown statuses can be changed when the patient arrives for their appointment).

11. Add the Patient **NHS Number** if applicable – although this is not a mandatory field, if the patient NHS Number is known, it should be added to the patient record
12. **If you had searched for your patient using initials and Date of Birth, you must complete the patient Surname and First Name**
13. The next field to complete is Ethnicity, select **17. Other – Not Known** this can be changed when the patient arrives for their appointment

Outpatient Referral

NHS Number: [] NHS No St

Surname: ZZZHOLD First Name: ELAINE

DOB: 15/07/1975 Original Dob: [] Age: 42

Ethnic Category: [] First Language: []

01. White - British
02. White - Irish
03. White - Any Other White Back
04. Mixed - White and Black Cari
05. Mixed - White and Black Afri
06. Mixed - White and Asian
07. Mixed - Any Other Mixed Bac
08. Asian or Asian British - Indian
09. Asian or Asian British - Paki
10. Asian or Asian British - D
11. Asian - Any Other
12. Black or Black British - Caribl
13. Black or Black British - Africa
14. Black - Any Other Black Back
15. Other - Chinese
16. Other - Any Other Ethnic Group
17. Other - Not Known
18. Other - Not Stated

14. The UK residency field should be set to **Unable to Validate** at this stage, if you are unaware of the residency status. When the patient arrives for their appointment this will be updated to demonstrate the actual residency status and NHS eligibility

Ethnic Category: 17. Other - Not Known First Language: []

UK Resident for 12 Months? Unable to Validate Country of Residence: [] GP Details: Crackett, Geoffrey

Home Phone Number: 01911234567 Work Phone Number: [] Mobile Phone Number: []

Address Organizer:

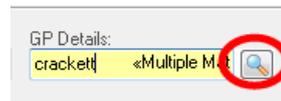
Address Type	Street Address	City	Begin effective date	End eff
Home	18	WASHINGTON	29/Aug/2017	Indefinite

15. The Administrative category defaults to NHS – this has populated from the UK residency field. This can be changed if appropriate. Cat2 is usually an outpatient medical report – or someone who has been referred by a solicitor for medical reports or assessments – diagnostics – no treatment. Amenity is a where a patient who is having NHS treatment has requested an ensuite room / private room

 The next field to complete is the GP. You must associate a GP Practice with the patient GP, otherwise the referral cannot be saved.

GP Practice Search

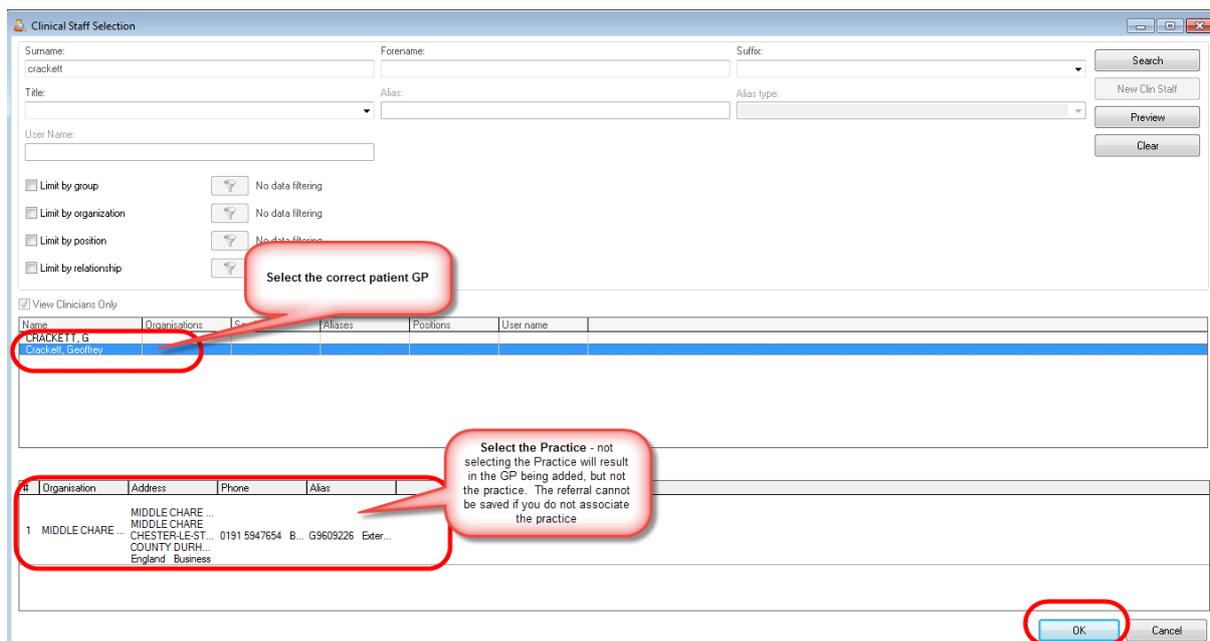
1. In the GP Details field, type the **name of the GP** you wish to find and click the magnifying glass to search



GP Details:
crackett <Multiple M...

wish to find and

2. In the top part of the screen, select the correct **GP**
3. At the bottom of this screen select the correct **GP Practice** – **click OK**. This will complete both the GP and the GP practice



Select the correct patient GP

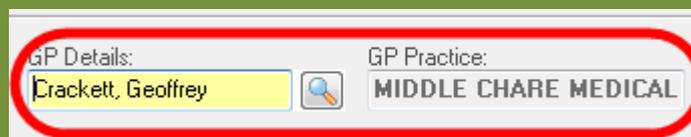
Name	Organisations	Aliases	Positions	User name
CRACKETT, G				
Crackett, Geoffrey				

Select the Practice - not selecting the Practice will result in the GP being added, but not the practice. The referral cannot be saved if you do not associate the practice

#	Organisation	Address	Phone	Alias
1	MIDDLE CHARE	MIDDLE CHARE CHESTER-LE-ST... COUNTY DURH... England Business	0191 5947654 B...	G9609226 Exer...

OK Cancel

The GP details are now populated on the patient record



GP Details:
Crackett, Geoffrey

GP Practice:
MIDDLE CHARE MEDICAL

Telephone No.



Although not yellow, this is a mandatory field. If the patient has a mobile number but not a home number, you should add **NK into the home number field** and the **mobile number** into the **Mobile Phone** field.

1. The options are Home Phone / Mobile phone / Work Phone. If the patient phone number is not known, or they do not have a telephone, YOU MUST ENTER **NK** into the home phone field. **Do not add a series of digits or a mobile number into the Home Phone field.** If the patient has a mobile number but not a home number, you should add **NK into the home number field** and the **mobile number** into the **Mobile Phone** field as this assists the DNA Reminder Service.

Phone Numbers Must be Numeric Only E.g. 2330000 or 0191233000

Home Phone Number:	Work Phone Number:	Extension:	Mobile Phone Number:	Alternate Phone Number:
<input type="text"/>				

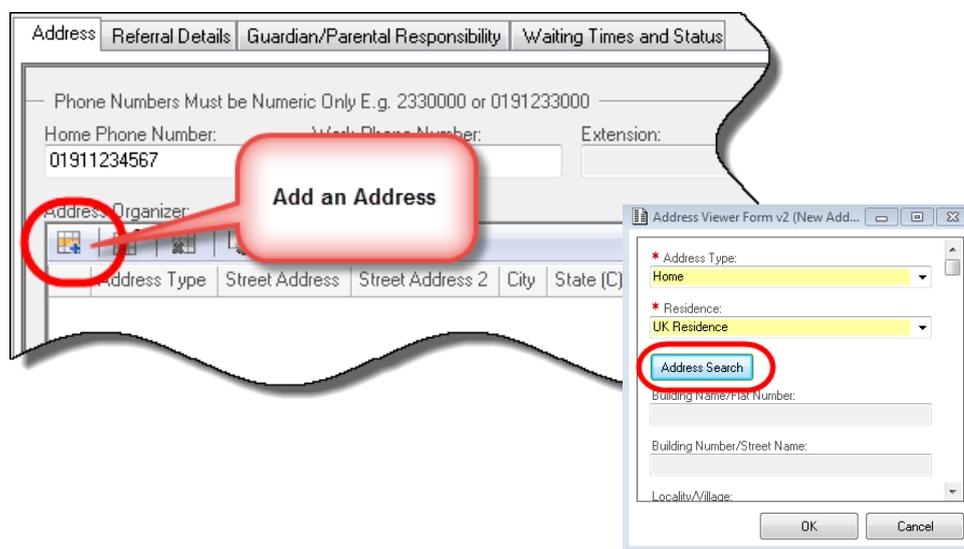
Add Patient UK Home Address – see the How To guide to Add or Update Patient Demographics to use alternative address formats



A patient address can be updated using the QAS (Quick Address Search) or free text.

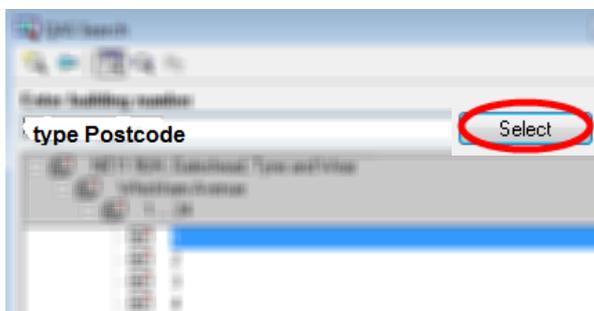
A patient can have a home address (their permanent residency) or a temporary address (where they are living for a fixed period of time and then returning to their home address). A temporary address should have an end date if known. A patient may have an overseas address, prison address or a protected address. Follow the relevant process in the **How To guide Add or Update Patient Demographics**

1. To add the patient's **home** address select the **Add** icon in the **Address Organizer** field
2. The Address Viewer will open - click **Address Search**



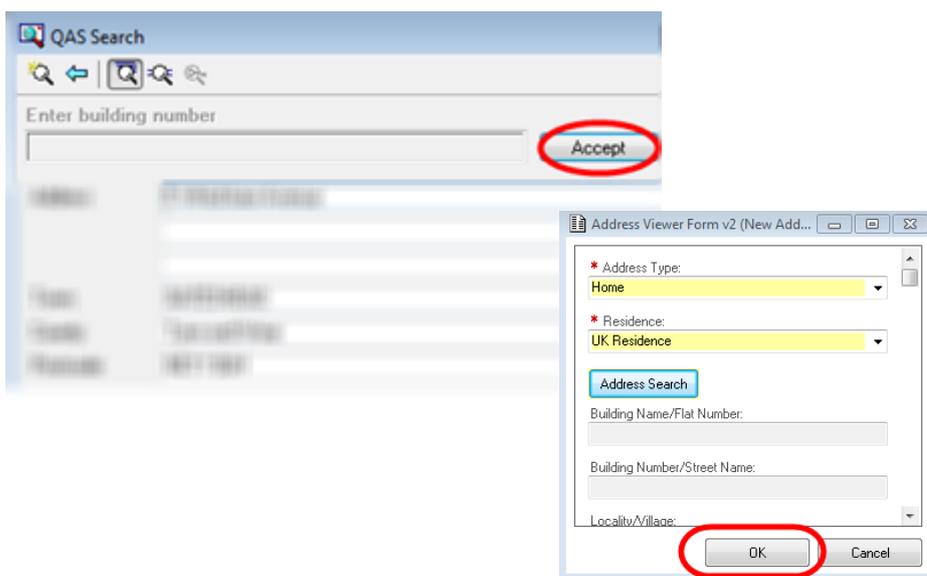
The QAS Address Search will open

3. Type the patients Postcode and press the Select button

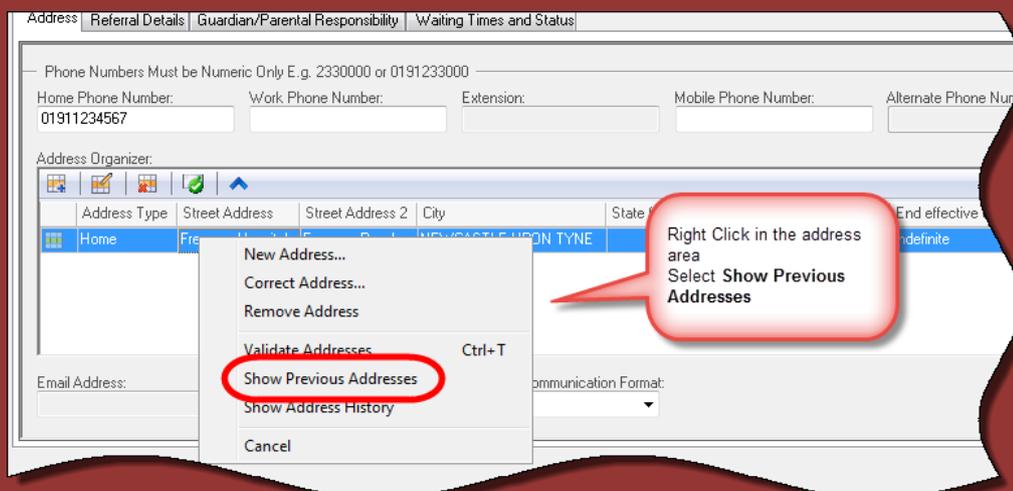


4. A list of addresses will display with a range of house numbers (check the street name). Highlight the relevant house range then press **Select** to open up a list of house numbers, again **Select** the correct address

- Once the QAS Search window is complete with the patients address, press **Accept** – click **OK** to close the search screen and **save** the patient record



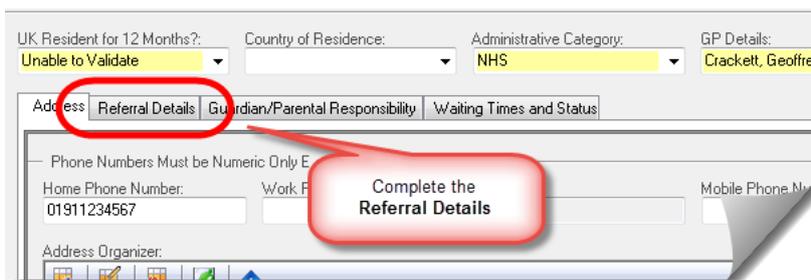
When you add a referral for the first time, why not use the opportunity to set your preferences to “Show Previous Addresses”



Referral Details Tab:

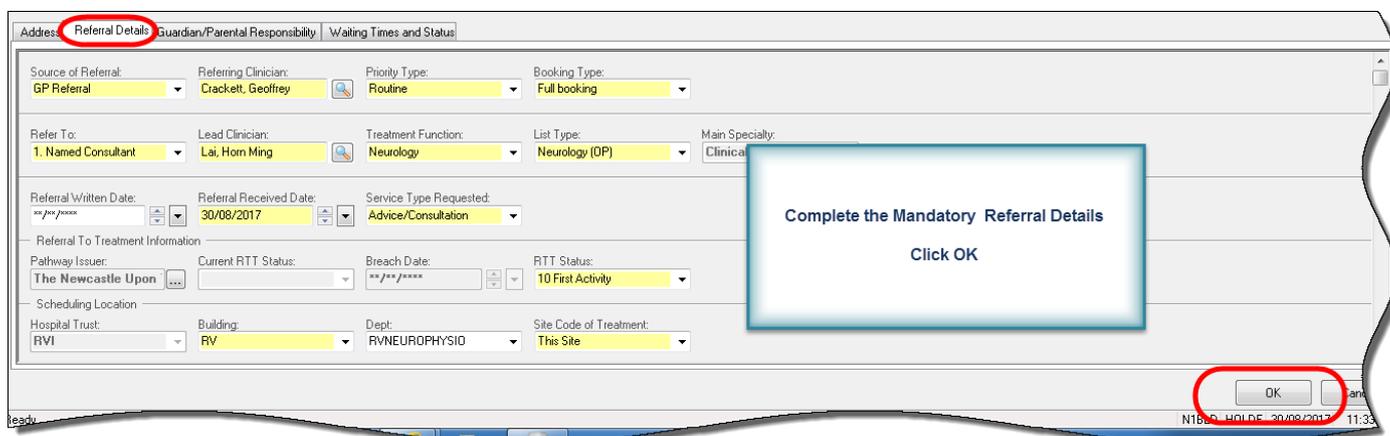
There are mandatory fields on the Referral Details tab to complete

Referral Details



From the **Referral Details Tab**, complete the missing fields:

- **Source of Referral:** Where the Referral has come from. If the referral has come from:
 - Patient GP – use GP Referral and the Referring Clinician field will auto-populate
 - A consultant within our Trust, or another Trust but who isn't an A&E Consultant– use Consultant (NOT A&E) Referring to a Different Consultant
- **Referring Clinician:** If a GP has referred, this field will auto-populate. If not GP, use the magnifying glass to locate the referring clinician typing the surname and first name of the referring clinician. If the referring clinician is not found, use **NotKnown – Referring Clinician Not Known**
- **Priority Type: Routine or Urgent**
- **Booking Type: Full Booking**
- **Refer To field** –Select the staff group (eg. Named Consultant, Pooled Consultant etc)
- **Lead Clinician:** Type the **Surname of the Lead Clinician**, click the **magnifying glass, double click** to select the correct clinician
- **Treatment Function:** Select the **correct treatment** from the dropdown list
- **List Type: Service (OP)**
- **Referral Received Date:** The **date** that the Referral was **received within the Trust**
- **Pathway Issuer:** If you are adding a Tertiary Referral, you will need to complete this field:
 - If the patient has been referred by a **department** within **NUTH**, type **THEN** and select The Newcastle upon Tyne Hospitals NHS Foundation Trust
 - If the patient has been referred by an **external organisation**, type **the name of the referring organisation and select from the list**
 - If the patient has been referred by their **GP**, this field will auto-populate
- **RTT Status:** the RTT Status **default to 10 for a first, new appointment** – *this may need to be changed for example: 98- Activity Not Applicable to Treat Period for all referrals that are excluded from the 18 week pathway eg. maternity*

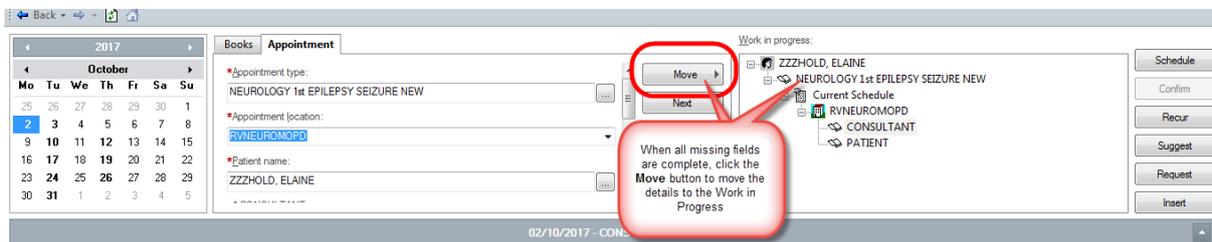




The referral will now close, summary information is displayed Click **OK**, you are returned to SchapptBook to add the appointment.

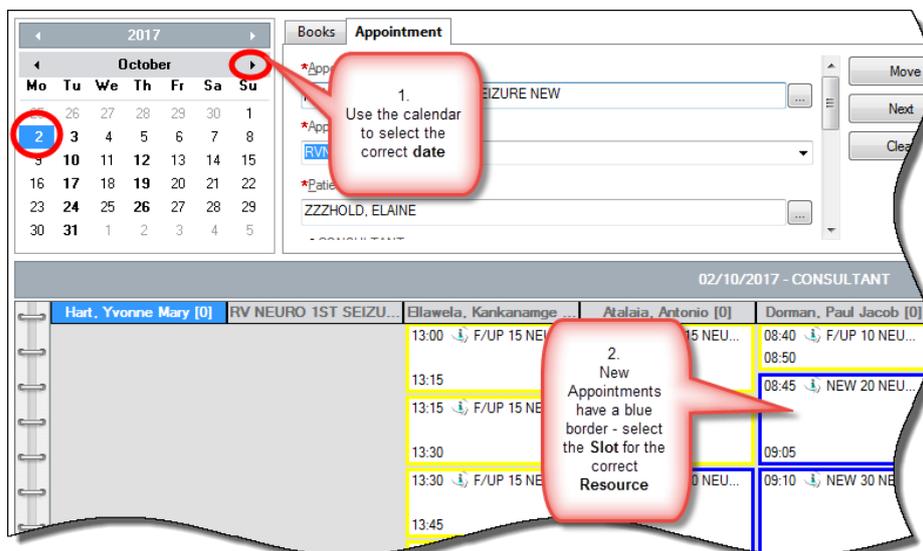
In SchapptBook

1. Check you have no more mandatory fields to complete
2. Clicking the **Move** button will transfer the appointment details to the Work in Progress section and an appointment date and time can now be given. **Your clinics may have “Slots” or a “Contiguous Clinic” both processes are shown in this guide**

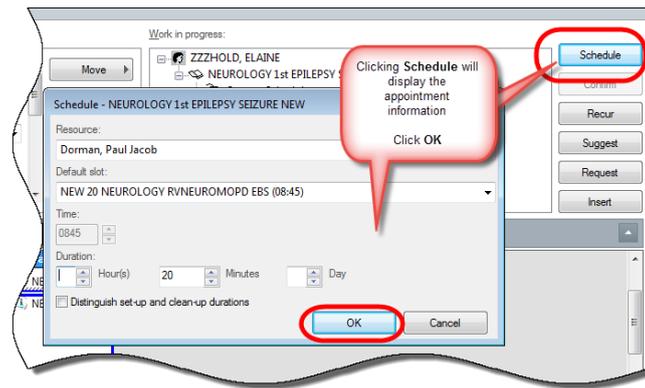


The Appointment - Using a New Appointment Slot

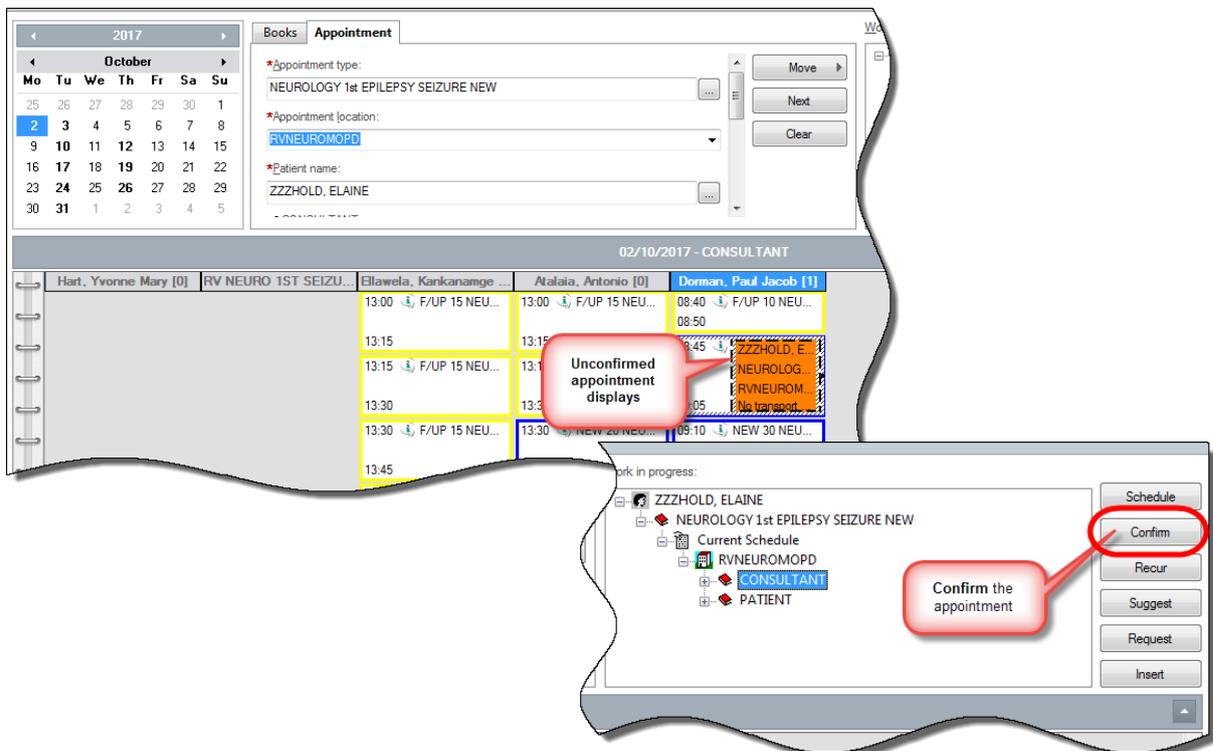
1. Locate the **date** for the appointment using the calendar
2. Select the **Slot** for the correct **Resource** – **New Appointment Types have a Blue Border**



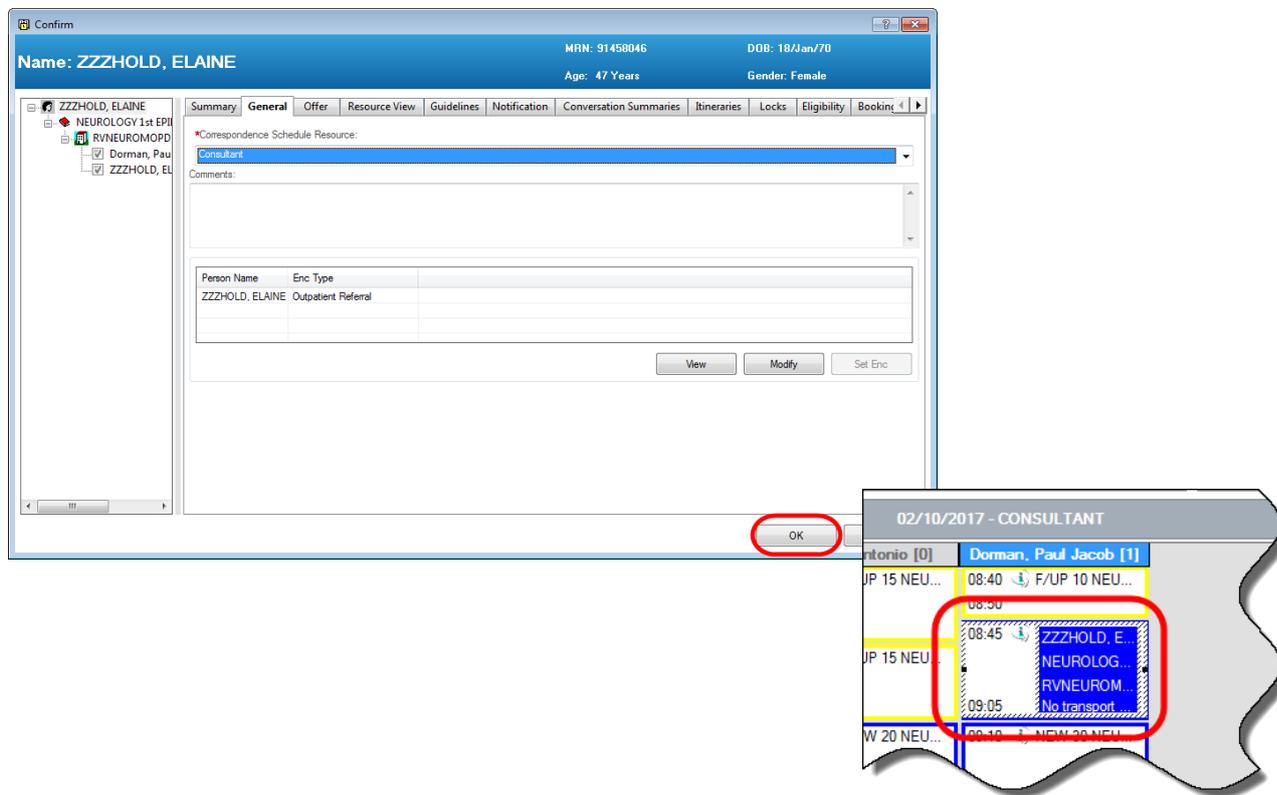
3. Selecting the **Schedule** button will display the clinic details



4. The **Unconfirmed** appointment displays against the resource, you must select **Confirm** to confirm the appointment



- Select the Correspondence Schedule Resource (this will display on the patient letter informing the patient who they will see). Click **OK**
- The appointment will now display as a confirmed (blue) New appointment against the resource

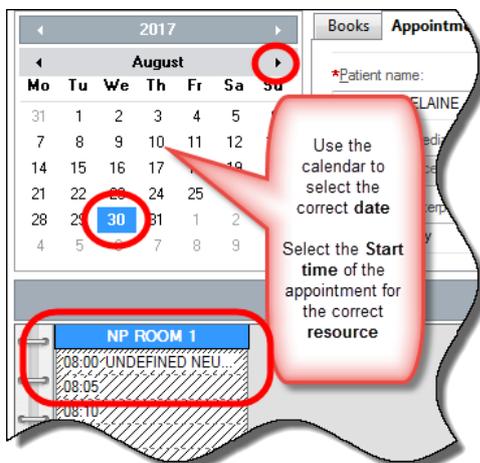


The Appointment - Using Part of a Contiguous Slot

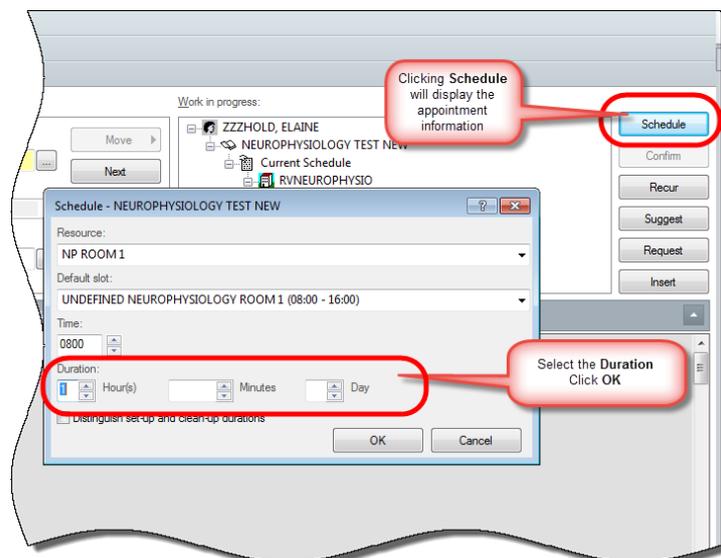


Some clinics have been created using “Contiguous” slots. A contiguous slot is a slot that extends over a long period of time and multiple patients use only a small portion of this slot. For example a clinic which has one slot which spans the whole clinic and patients are booked into a portion of this slot: patient 1 may use 5 minutes of this slot, patient 2 may use 30 minutes and patient 3 may use 10 minutes etc.

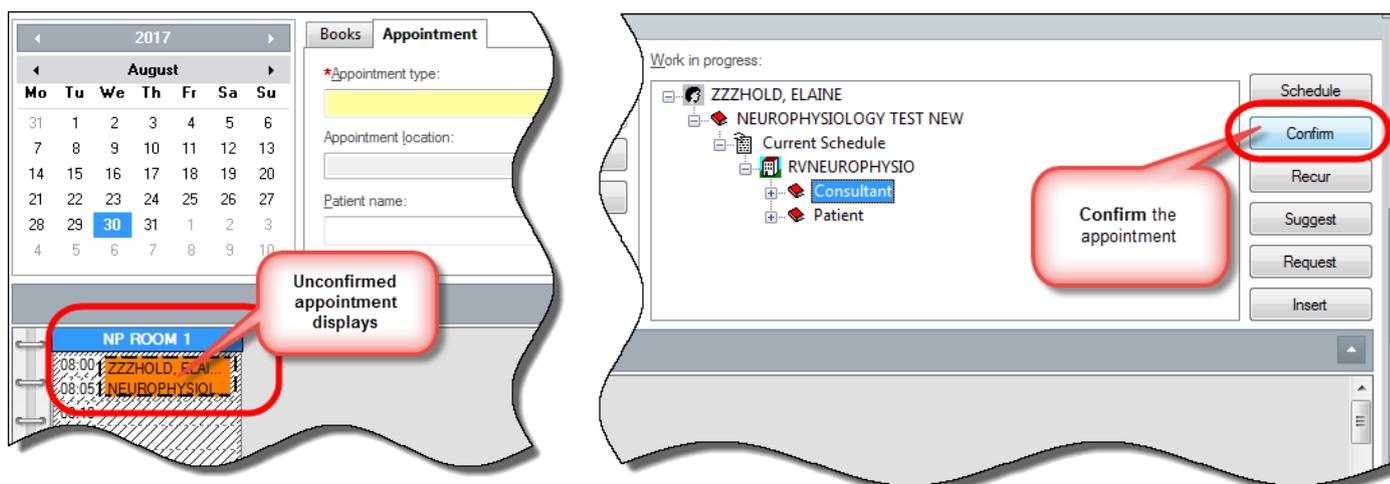
1. Locate the **date** for the appointment using the calendar
2. Select the **Start Time** for the correct **Resource**



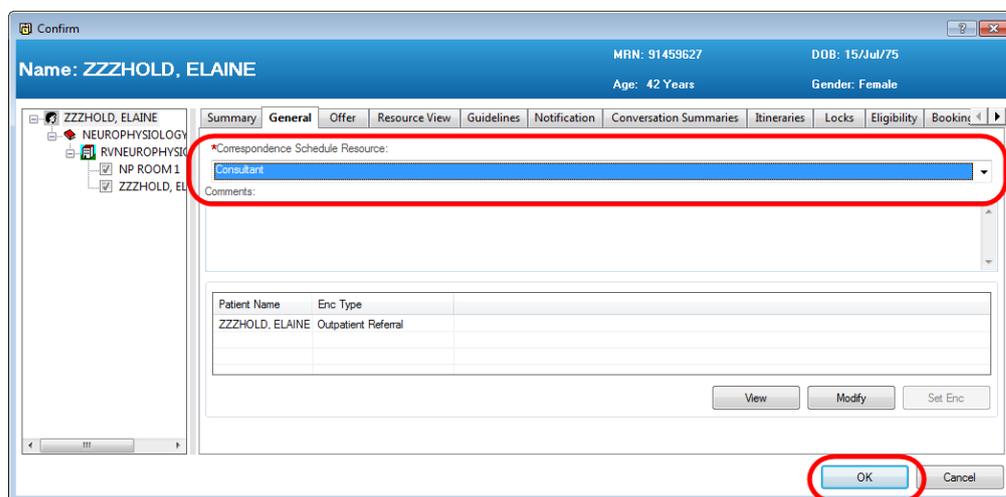
3. Selecting the **Schedule** button will display the clinic details
4. You must **adjust** the **Patient Duration** to reflect the minutes that this appointment will be scheduled. If this is not adjusted, this appointment may schedule longer than required!



- The **Unconfirmed** appointment displays against the resource, you must select **Confirm** to confirm the appointment



- Select the **Correspondence Schedule Resource** (this will display on the patient letter informing the patient who they will see). Click **OK**



- The appointment will now display as a **confirmed (blue)** New appointment against the resource

