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
- 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

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> Su 6 13 20 27 3 10	Books Appointment *Appointment type: NEUROPHYSIOLOGY TEST NEW *Appointment location: RVNEUROPHYSIO *Appointment location: RVNEUROPHYSIO *Patient name: Image: Comparison of the test of test	Click the Ellipsis to search for your patient Next Clear
	$\overline{}$	29/08/2017

5. 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)

Pathway Form - New Episode	
* Pathway Type: <mark>18 Week Wait Pathway</mark>	
	Using the Correct Conversation 83
	Is this a New outpatient appointment
ОК	
	Yes No

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
- The next field to complete is Ethnicity, select 17. Other – Not Known this can be changed when the patient arrives for their appointment

MB: NHS Number: 9 Add NHS Number if applicable to this patient Surname: Titl Surname: ZZZHOLD ZZZHOLD D0B: Original Dob: 15/07/1975 Image: Ethnic Category: First Language: 01. White - British Image: 02. White - Irish Image: 03. White - Any Other White Back Image: 04. Mixed - White and Black Carl If the ethnicity is unknown, select 17 - 05. Mixed - White and Black Carl Image: 05. Mixed - White and Black Carl If the ethnicity is unknown, select 17 - 05. Mixed - White and Black Afrith - Carlot If the ethnicity is unknown, select 17 - 06. Asian or Asian British - Pakist Indiar of Asian Of Asian British - Pakist 10. Asian or Asian British - Carlot Can be changed when patient arrives for their appointment			🤨 Outpatient Referral
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13. Black or Black British - Africa 14. Black - Any Other Black Back 15. Other - Chinese 16. Other - Not Known 17. Other - Not Known 18. Other - Not Known 19. Other - Not Known <	Exte	appointment	12. Black or Black British - Caribl 13. Black or Black British - Africa 14. Black - Any Other Black Back 15. Other - Chinese 15. Other - Not Known 17. Other - Not Known 19. Other - Not Known

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



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.

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GP Practice Search

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



- 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

🚨 Clinical Staff Selection			- • •
Sumame:	Forename:	Suffix:	
crackett		·	Search
Title:	Alias:	Alias type:	New Clin Staff
		· · · · · · · · · · · · · · · · · · ·	Preview
User Name:			Class
			Clear
Limit by group No data filtering			
Limit by organization No data filtering			
Limit by position			
Limit by relationship	patient GP		
View Clinicians Only			
Name Organisations Aliases	Positions User name		
Chackett, Geoffrey			
	selecting the Practice - not selecting the Practice will result		
Dimensation Address Phone Alias	in the GP being added, but not		
	be saved if you do not associate		
1 MIDDLE CHARE MIDDLE CHARE	the practice		
COUNTY DURH	ler		
England business			
		OK	Cancel

The GP details are now populated on the patient record											
	GP Details: Crackett, Geoffrey	GP Practice: MIDDLE CHARE MEDICAL									

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.

 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:								
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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 Organiser** field
- 2. The Address Viewer will open click Address Search

Address Referral Details Guardian/Parental Responsibility Waiting Time	es and Status
Phone Numbers Must be Numeric Only E.g. 2330000 or 0191233000 Home Phone Number: 01911234567 Add an Address Indicess Organizer Indicess Type Street Address Street Address 2 City State (C	nsion: Address Viewer Form v2 (New Add

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

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5. 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 $\widehat{\mathbf{I}}$ preferences to "Show Previous Addresses" Address Referral Details Guardian/Parental Responsibility Waiting Times and Status Phone Numbers Must be Numeric Only E.g. 2330000 or 0191233000 Home Phone Number: Work Phone Number: Mobile Phone Number: Alternate Phone N Extension: 01911234567 Address Organizer: 🔣 🗹 👮 💊 🔨 Address Type Street Address Street Address 2 City State End effective Right Click in the address efinit New Address... area Select Show Previous Correct Address... Addresses Remove Address Validate Addresse Ctrl+T Show Previous Addresses Email Address: ommunication Format: Show Address History Cancel

Referral Details Tab:
 There are mandatory fields on the Referral Details tab to complete

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Referral Details

UK Resident for 12 Months?: Country of R Unable to Validate	esidence: Administrative Category:	GP Details:
Address Referral Details Guirdian/Parenta	Responsibility Waiting Times and Status	
Phone Numbers Must be Numeric Only E Home Phone Number: Work F 01911234567	Complete the Referral Details	Mobile Phone Ny
Address Organizer:		

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 Applic to Treat Period for all referrals that are excluded from the 18 week pathway eg. maternity*

Address Referral Details Guardia	an/Parental Responsibility Waitin	ng Times and Status				
Source of Referral: GP Referral	Referring Clinician: Crackett, Geoffrey	Priority Type: Routine	Booking Type: Full booking	•		
Refer To: 1. Named Consultant	Lead Clinician: Lai, Horn Ming	Treatment Function: Neurology	List Type: Neurology (OP)	Main Spe Clinica	cialty:	1
Referral Written Date:	Referral Received Date: 30/08/2017	Service Type Requested: Advice/Consultation			Complete the Mandatory Referral Details	
Referral To Treatment Informatio Pathway Issuer: The Newcastle Upon []	Current RTT Status:	Breach Date:	RTT Status: 10 First Activity	•	Click OK	
- Scheduling Location	Building: RV 🗸	Dept: RVNEUROPHYSIO	Site Code of Treatment: This Site	•		
						OK Jana
idu						N18-0 HOLDE 30/08/2017 11:33

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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

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16	17	18	8 1	9 20	21	22	*Patient name:	are complete, click the
23	24	25	52	6 27	28	29	ZZZHOLD, ELAINE	Move button to move the Request
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							1	- Togrood
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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

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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

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

Confirm						? 🔀	
ma: 7774010				MRN: 91458046	DOB: 18/Jan/70		
une. 22211010, 1				Age: 47 Years	Gender: Female		
CZZHOLD, ELAINE	Summary General	Offer Resource Vi	ew Guidelines Notificati	on Conversation Summaries I	tineraries Locks Eligibility	Bookin <u>e</u> 🖡 🕨	
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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

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- 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!

Clicking Schedule Work in progress:	
Move Move	
Next Image: Contract Schedule Image: Contract Schedule <td>tim cur</td>	tim cur
Resource: NP ROOM1	Jest ert
UNDEFINED NEUROPHYSIOLOGY ROOM 1 (08:00 - 16:00) Time: 0000	
Duration: Duration: Duration: Click OK Click OK	J
OK Cancel	

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



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

					MRN: 91459627		DOB: 15/J	Jul/75	
ame: ZZZHOLD, EL	AINE				Age: 42 Years		Gender: F	emale	
ZZZHOLD, ELAINE S	ummary General	Offer Resourc	e View Guidelines	Notification	Conversation Summaries	Itineraries	Locks	Eligibility	Bookin <u>(</u> 4
RVNEUROPHYSIOLOGY	*Correspondence Sche	edule Resource:							
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7. The appointment will now display as a confirmed (blue) New appointment against the resource

