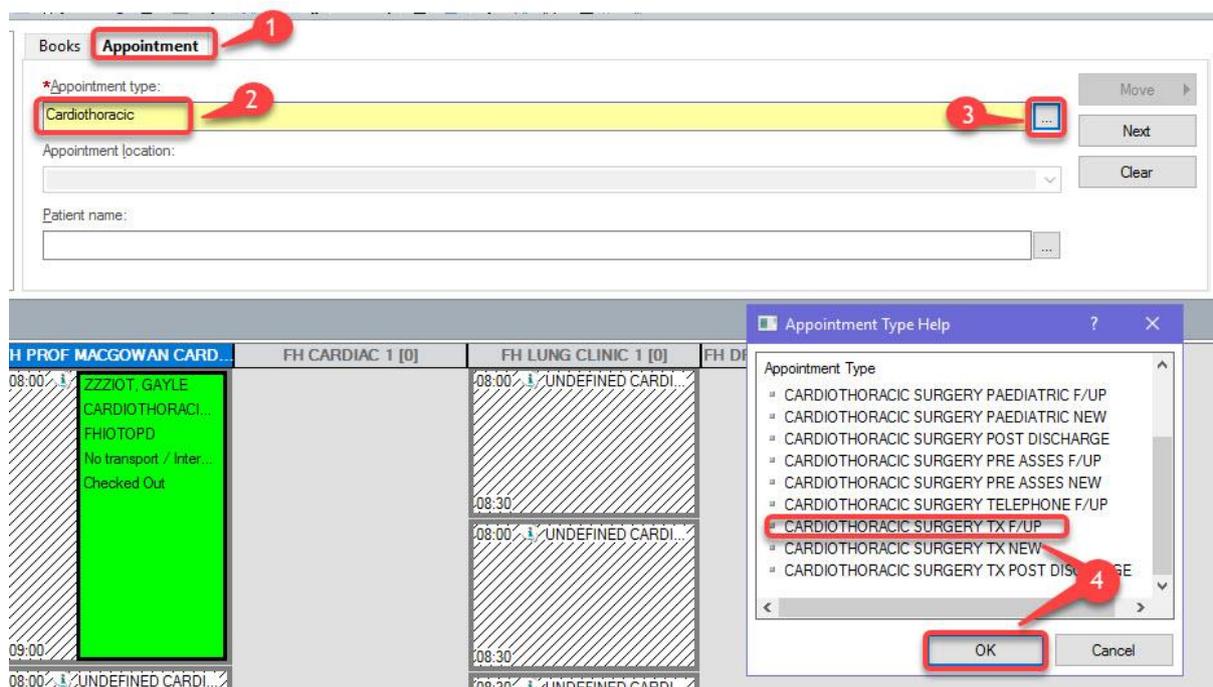


IOT - How to create a follow up appointment

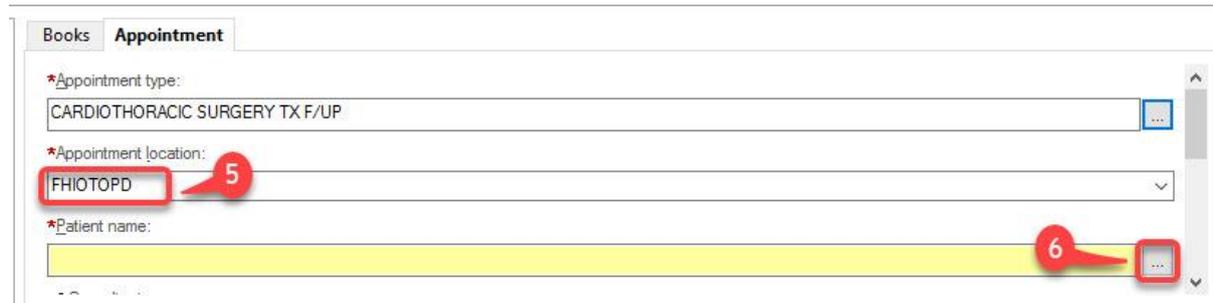
Instructions

In Schapptbook

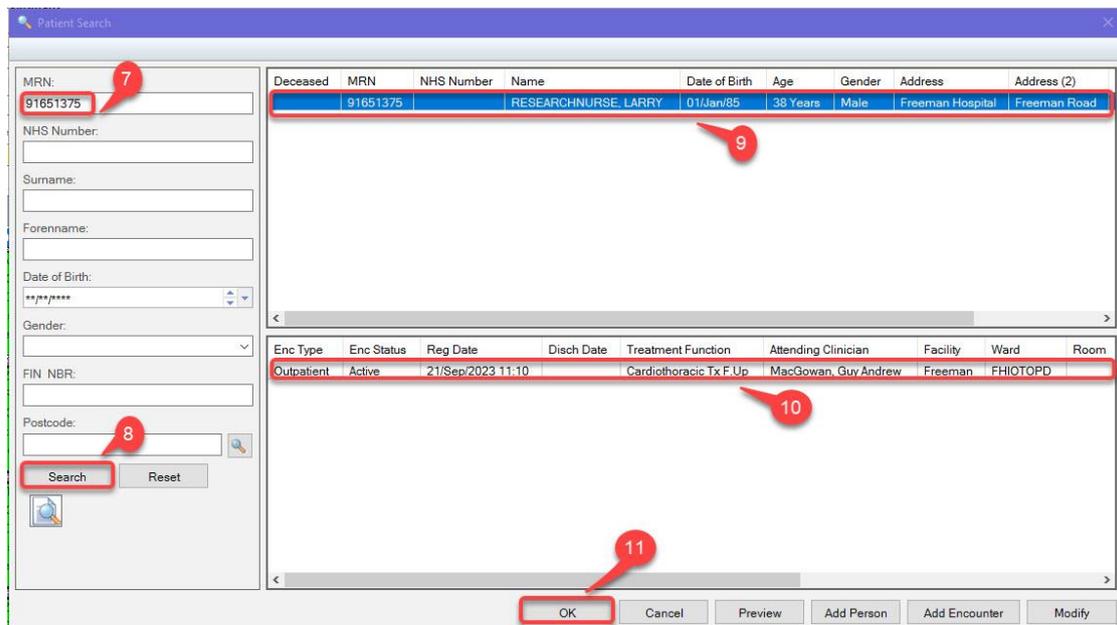
1. Click on the **Appointment** tab.
2. Type **Cardiothoracic** in the **Appointment type** field.
3. Click on the ellipse.
4. Select **CARDIOTHORACIC SURGERY TX F/UP** from the opening Appointment Type help window, then click **OK**.



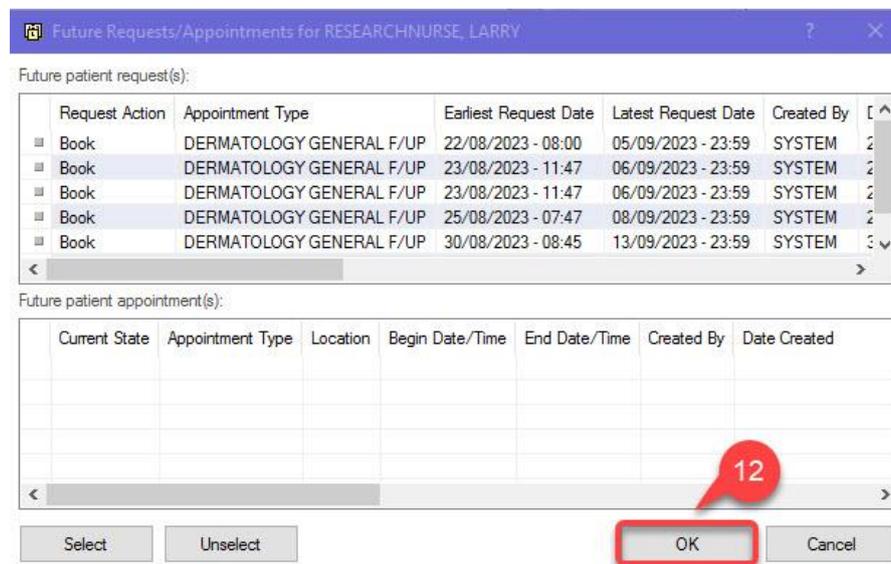
5. Select the **IOT** Location in the Appointment Location field.
6. Select the ellipse in the Patient name field to open the Patient search window.



7. Type the patient's **MRN** in the MRN field.
8. Click **Search**.
9. Check the **correct Patient** details are now showing in the top right-hand side row - If correct, move on to stage 10, if not correct check you have typed in the correct MRN and repeat stage 7.
10. Select the **Outpatient Cardiothoracic encounter**.
11. Click **OK**.



12. If the Future Requests/Appointments window appears, click **OK**.



13. The patient's name will now appear in the **Appointment** column – you can select a specific Consultant and add any comments at this point.

The screenshot shows the 'Appointment' form with the following fields:

- *Appointment location: FHIOTOPD
- *Patient name: RESEARCHNURSE, LARRY
- Consultant: All Resources»

A red box highlights the first three fields, and a red callout bubble with the number 13 points to the patient name field.

14. Click **Move** to move the patient's appointment details across to the **Work in progress** column.

The screenshot shows the 'Work in progress' column with a list of appointment details for 'RESEARCHNURSE, LARRY' and 'CARDIOTHORACIC SURGERY TX F/UP'. A red box highlights the 'Move' button on the left, and a red callout bubble with the number 14 points to it.

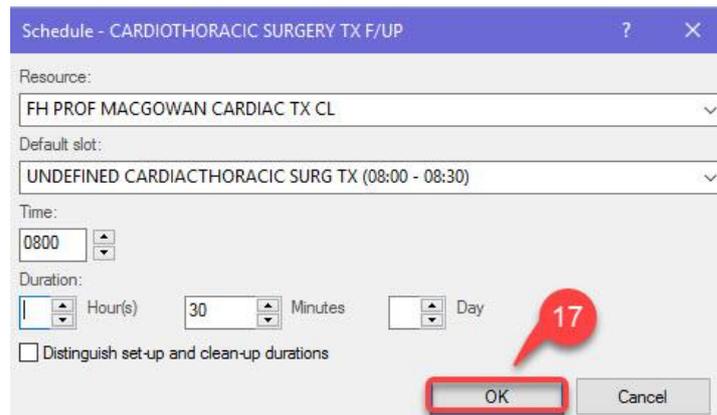
15. Select the **appointment date** and **clinic time slot**.

The screenshot shows the appointment calendar for October 2023. The date '10' is highlighted in yellow, and a red callout bubble with the number 15 points to it. Below the calendar, the appointment details form is visible, showing the appointment type 'CARDIOTHORACIC SURGERY TX F/UP', location 'FHIOTOPD', and patient name 'RESEARCHNURSE, LARRY'. A red box highlights the time slot '08:00' under the 'FH PROF. MACGOWAN CARD' column.

16. Select **Schedule**.

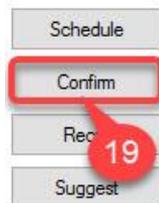
The screenshot shows the 'Work in progress' column with the appointment details for 'RESEARCHNURSE, LARRY' and 'CARDIOTHORACIC SURGERY TX F/UP'. A red box highlights the 'Schedule' button on the right, and a red callout bubble with the number 16 points to it.

17. Click **OK** in the opening Schedule window.

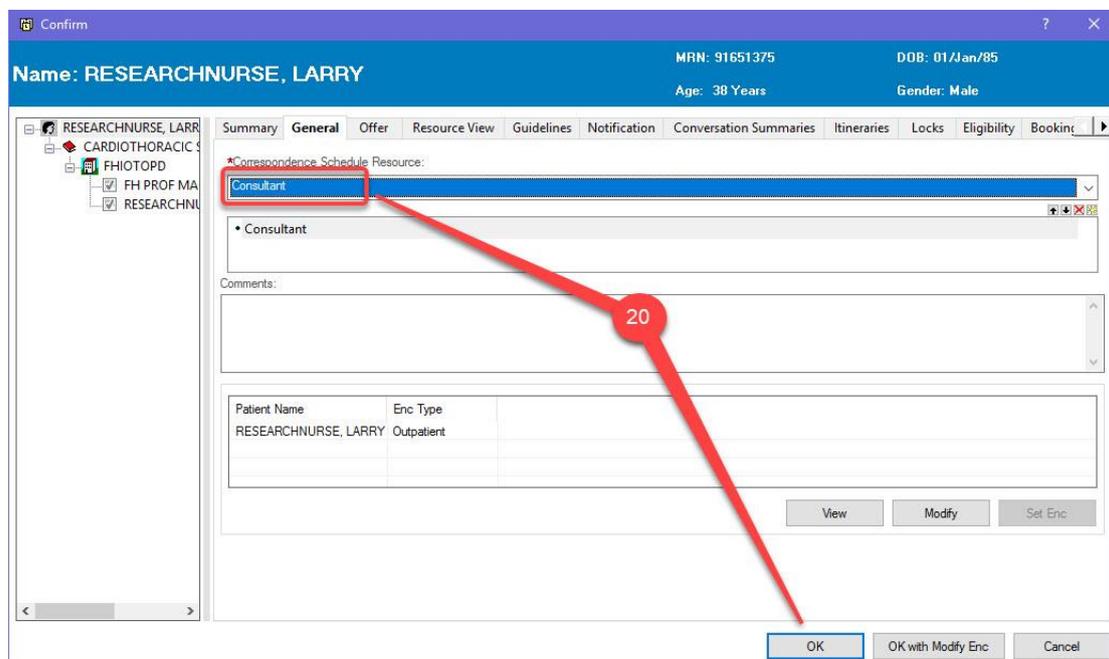


18. The appointment slot now changes to an **Orange** colour – the slot is now reserved.

19. Select **Confirm**.



20. From the opening Confirm window select **Consultant** in the Correspondence Schedule Resource field – the consultant's name will appear on the letter sent to the patient.



21. Select **No** from the opening Wrong conversation window.



22. The appointment slot will now be showing **Yellow** confirming the appointment – Yellow signifies a follow -up appointment.

