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.

Books Appointment	
*Appointment type:	
CARDIOTHORACIC SURGERY TX F/UP	
*Appointment location:	
RPatient name:	
Taken Hand.	6
-	

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- 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**.

	ed MRN	NHS Number	Name	Date of Birth	Age	Gender	Address	Addres
	91651375	1	RESEARCHNURSE, LA	RRY 01/Jan/85	38 Years	Male	Freeman Hospi	al Freem
				9				
<								
Enc Typ	e Enc Status	Reg Date	Disch Date Tr	eatment Function	Attending Clin	nician	Facility	Ward
8					10			
Brut								
Reset								
neset								

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

			83				1000			
	Request Action	Appointment Typ	e		Earliest Re	equest Date	Late	est Request D	ate Created B	y [^
9	Book	DERMATOLOGY	GENERA	L F/UP	22/08/202	23 - 08:00	05/	09/2023 - 23:	59 SYSTEM	2
ш	Book	DERMATOLOGY	GENERA	L F/UP	23/08/202	23 - 11:47	06/	09/2023 - 23:	59 SYSTEM	2
ш	Book	DERMATOLOGY	GENERA	L F/UP	23/08/202	23 - 11:47	06/	09/2023 - 23:	59 SYSTEM	2
-	Book	DERMATOLOGY	GENERA	L F/UP	25/08/202	23 - 07:47	08/	09/2023 - 23:	59 SYSTEM	2
ш	Book	DERMATOLOGY	GENERA	L F/UP	30/08/202	23 - 08:45	13/	09/2023 - 23:	59 SYSTEM	3.
¢										>
Jtu	re patien <mark>t appoint</mark>	ment(s):								
	Current State	Appointment Type	Location	Begin	Date/Time	End Date/	<u>Fime</u>	Created By	Date Created	
								-	12	
1				() () () () () () () () () ()						

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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.

*Appointment location:	
FHIOTOPD 13	×
*Patient name:	
RESEARCHNURSE, LARRY	
Consultant:	
«All Resources»	

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

	E- C RESEARCHNURSE, LARRY	Schedule
Move P	ia-∽ CARDIOTHORACIC SURGERY TX F/UP	Confirm
N OX		Recur
- C al	Patient	Suggest
14		Request
-		Insert

15. Select the appointment date and clinic time slot.

243			2023			۲	Books Appointment			
्य		C)ctob	er		•	*Appointment type:			
Мо	Tu	We	Th	Fr	Sa	Su	CARDIOTHORACIC SURGER	Y TX F/UP		
25	26	27	28	29	30	1				
2	3	4	5	6	7	8	*Appointment location:			
9	10	11	12	13	14	15	FHIOTOPD			
16	17	18	19	~	15	22	*Patient name:			
23	24	25	26	27	19	29	RESEARCHNURSE, LARRY			
30	31	1	2	3	4					
	FH DF	r fef	RNAN	DEZ	CARD	DIAFI	H PROF MACGOWAN CARD	FH CARDIAC 1 [0]	FH LUNG CLINIC 1 [0]	FI
							18:00 19 UNDEFINED CARDI		08:00/1/UNDEFINED CARDI	

16. Select Schedule.



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

Schedule - CARDIOTHORACIC SURGERY TX F/UP	?	×
Resource:		
FH PROF MACGOWAN CARDIAC TX CL		~
Default slot:		
UNDEFINED CARDIACTHORACIC SURG TX (08:00 - 08:30)		~
Time: 0800 • Duration: • Hour(s) 30 • Minutes Day 17 Distinguish set-up and clean-up durations	Cance	e e e e e e e e e e e e e e e e e e e

- 18. The appointment slot now changes to an **Orange** colour the slot is now reserved.
- 19. Select Confirm.



FH PROF	MACGOWAN CARD
08:00	RESEARCHNURS
08:05	CARDIOTHORACI
08:10	FHIOTOPD
08:15	No transport / Inter
08:20	Pending
08:25/	8
08:00	UNDEFINED CARDI
	///// 18 ///
	///////////////////////////////////////
08:30	
100.00//	

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.

🛗 Confirm									?	×
					MRN: 91651375		DOB: 01/Jan	/85		
Name: RESEARCHI	IOHSE, LAHHY				Age: 38 Years		Gender: Male			
RESEARCHNURSE, LARR CARDIOTHORACIC S CARDIOTHOTOPD I FHIPROF MA I RESEARCHNU	Summary General Offer Consultant Consultant Comments: Patient Name RESEARCHNURSE, LARRY	Enc Type Outpatient	Guidelines	Notification	Conversation Summaries	View	Locks Eliy	gibility 1	Bookint € ♥ ♥	
< >>										
					OK	0	K with Modify Er	nc	Cancel	

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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.

FH PROF	MACGOWAN CARD
08:00 08:05 08:10 08:15 08:20 08:25	RESEARCHNURS CARDIOTHORACI FHIOTOPD No transport / Inter Confirmed
08:00	UNDEFINEL CARDI