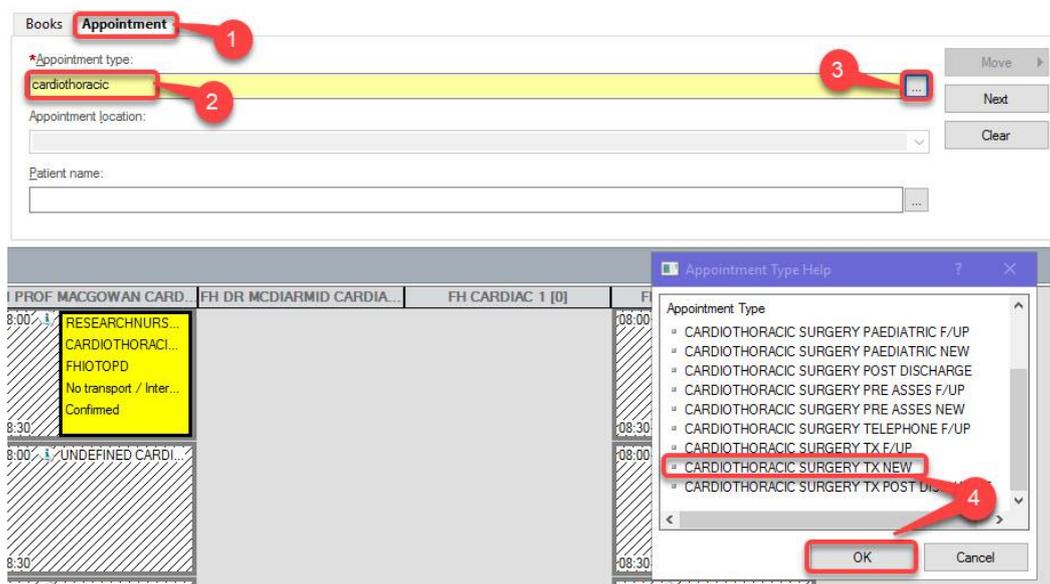


# IOT – How to create a new appointment

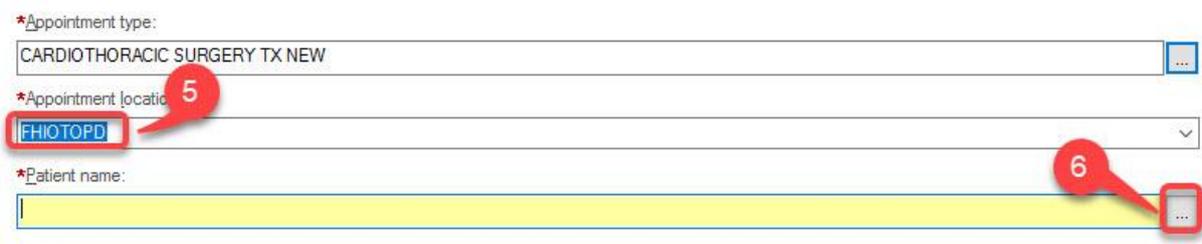
## Instructions

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 NEW** 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. Click **Add Encounter**.

MRN: 91651426

NHS Number:

Surname:

Forename:

Date of Birth: \*\*/\*\*\*\*\*\*

Gender:

FIN NBR:

Postcode:

Search Reset

Deceased	MRN	NHS Number	Name	Date of Birth	Age	Gender	Address	Address (2)	Postcode
	91651426		ZZZHUNTER, IOT1	01/Jan/80	43 Years	Male	2 Hawthorn Road West		NE3 4DN

No encounters found.

OK Cancel Preview Add Person Add Encounter Modify

11. Select **Yes** to the 'Is this a Waiting List encounter?'.

Appointment Book

? Is this a Waiting List encounter?

Yes No

12. Select **Outpatient Referral** then click **OK**.

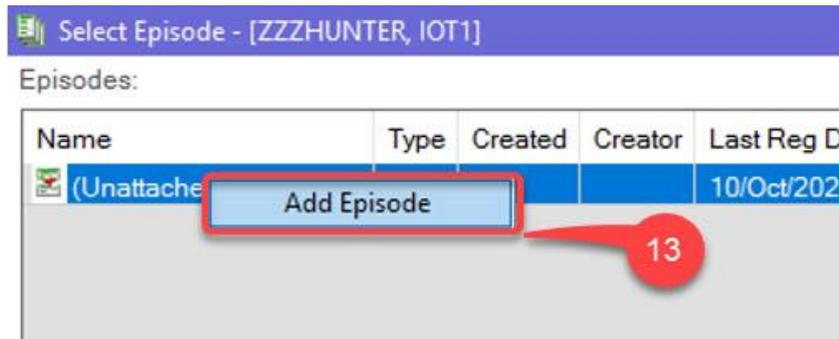
Available Conversations

Please select the conversation you would like to use:

Outpatient Referral

OK

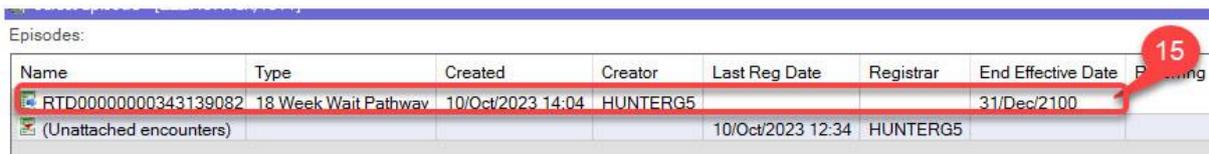
13. Right-click in the top left-hand corner of the page and select **Add Episode**.



14. Select **18 Week Pathway** then click **OK**.



15. Double left-click on the new episode created.



16. Click **Yes** to the question 'Is this a New outpatient appointment?'.



17. Select **Yes** for the UK Resident for 12 months? field – the Administrative Category will now automatically be populated with **NHS**.

\* Ethnic Category: 01. White - British First Language: Interpreter R

\* UK Resident for 12 Months?: \* Administrative Category: Admission C

Address Referral Details Guardian/Parental Responsibility Waiting Times and Status

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

Home Phone Number: 01912345678 Work Phone Number: Extension:

Address Organizer:

18. Click on the **Referral** Details tab and complete the following mandatory fields:

- Source of Referral – This will generally be **Consultant**.
- Referring Clinician – Type and search for clinician’s name.
- Priority type – **Routine**.
- Booking Type – **Full booking**.
- Lead Clinician – Type and search for clinician’s name.
- Treatment Function – Select **Cardiothoracic Tx F.Up**.
- List Type - Select **Cardiothoracic Tx F.Up (op)**.
- Referral Received Date – Type ‘T’ on the keypad to insert today’s date.
- Pathway issuer – type ‘then’ in the box and click on search icon then select **Newcastle Upon Tyne Hosps NHS Fdn Tr**.

Address Referral Details Guardian/Parental Responsibility Waiting Times and Status

\*Source of Referral: Consultant (NOT A&E) Referral-D \*Referring Clinician: MacGowan, Guy Andrew Referring Organisation: \*Priority Type: Routine \*Booking Type: Full booking Short Notice:

\*Refer To: 1. Named Consultant \*Lead Clinician: MacGowan, Guy Andrew \*Treatment Function: Cardiothoracic Tx F.Up \*List Type: Cardiothoracic Tx F.Up (OP) Main Specialty: Cardiology

Referral Written Date: \*Referral Received Date: 10/10/2023 \*Service Type Requested: Advice/Consultation

Referral To Treatment Information

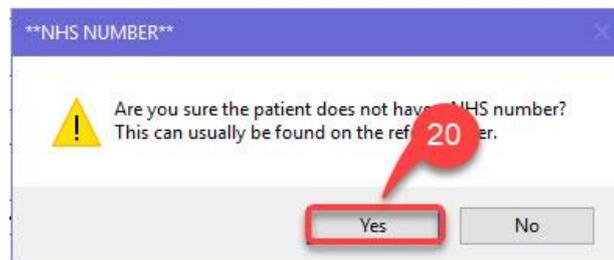
\*Pathway Issuer: The Newcastle Upon Tyne Hosps Current RTT Status: Breach Date: \*RTT Status: 12 Consultant Referral - New Con

Scheduling Location

Hospital Trust: Freeman \*Building: FH Dept: FHIOTOPD \*Site Code of Treatment: This Site

19. Click **OK** in the bottom right hand-side of the screen.

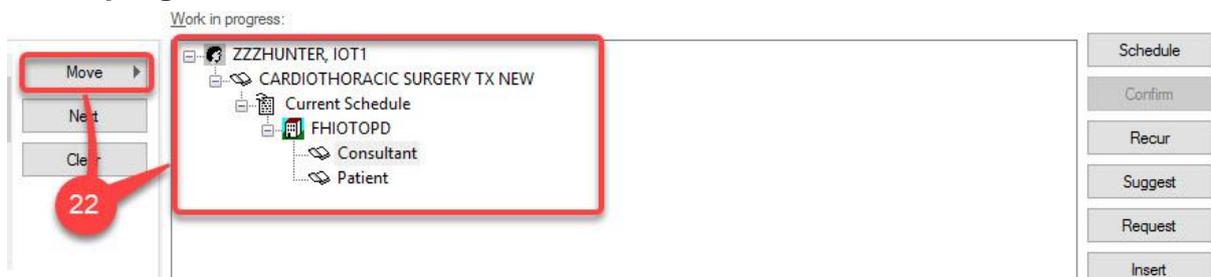
20. If you have the patient's NHS number you can click **No** to the opening NHS number window and add the patient's NHS number to their record, if not, click **Yes**.



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



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



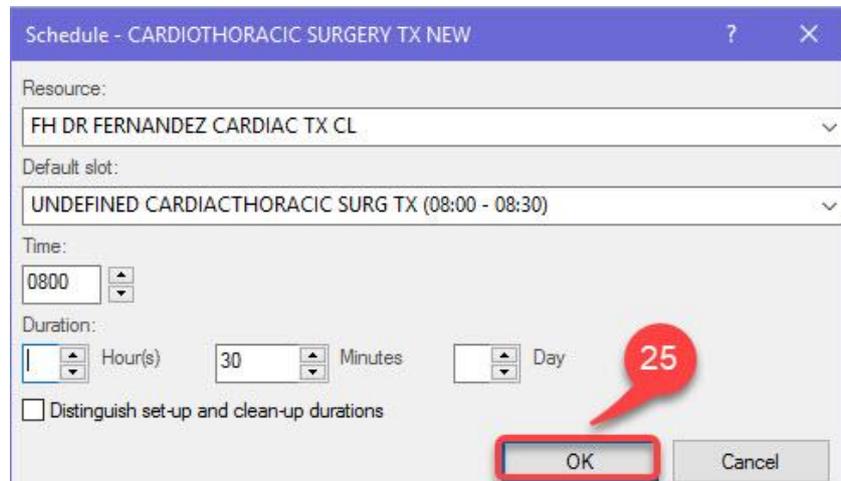
23. Select the **appointment date** and **clinic time slot**.



24. Select **Schedule**.

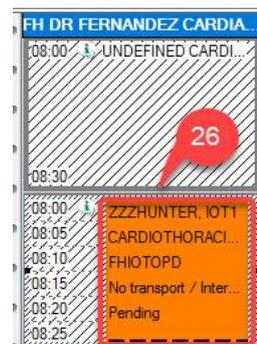
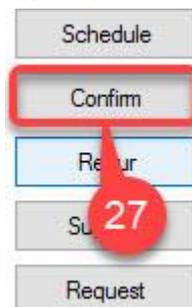


25. Click **OK** in the opening Schedule window.

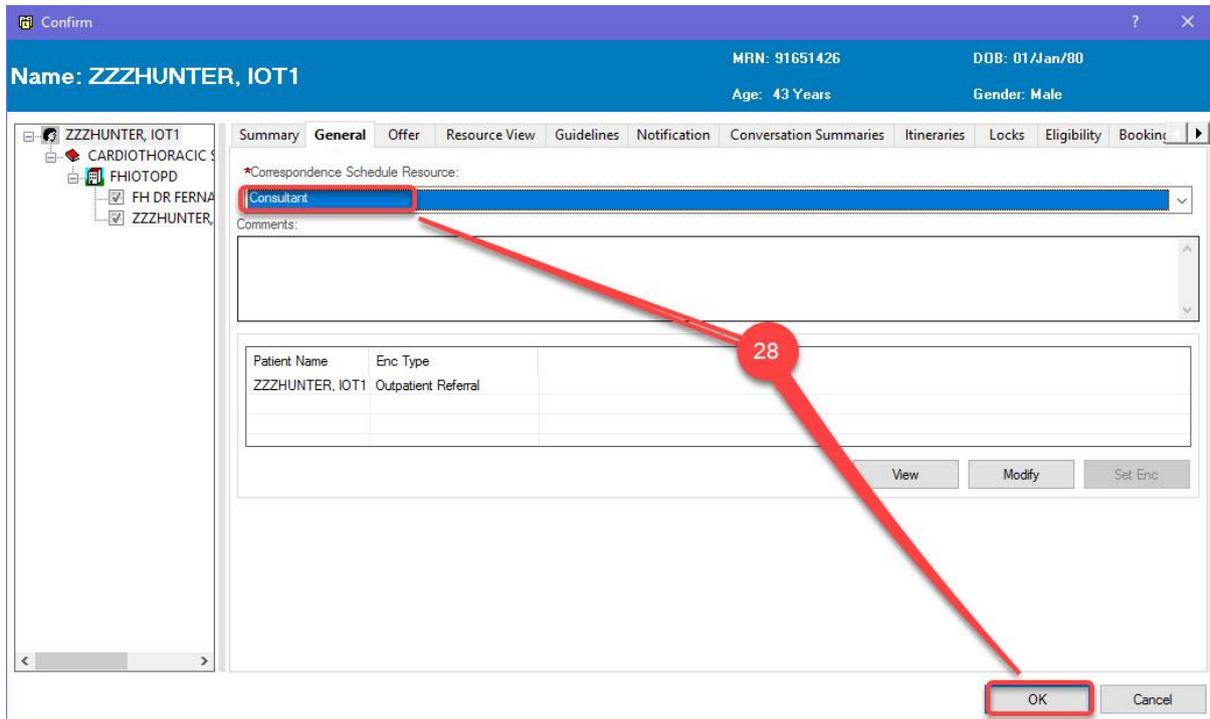


26. The appointment slot now changes to an **Orange** colour – the slot is now reserved.

27. Select **Confirm**.



28. From the opening Confirm window select **Consultant** in the Correspondence Schedule Resource field and click **OK**– the consultant’s name will appear on the letter sent to the patient.



29. The appointment slot will now be showing **Blue** confirming the appointment – Blue signifies a new appointment.

