## 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.

*Appointment type:	
CARDIOTHORACIC SURGERY TX NEW	
*Appointment locatio 5	
FHIOTOPD	×
*Patient name:	6
1	

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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. Click Add Encounter.

Note: The American Search										
MRN: 7	Deceased	MRN	NHS Number	Name	Date of Birth	Age	Gender	Address	Address (2)	Postcode
91651426		91651426		ZZZHUNTER, IOT1	01/Jan/80	43 Years	Male		2 Hawthorn Road West	NE3 4DN
NHS Number:						9				
Surname:										
Forenname:										
Date of Birth:										
******										
Gender:	<									>
×	No encounte	rs found.								
FIN NBR:										
Postcode: 8										
Search Reset										
									10	
				ОК	Cancel	Preview	Ad	d Person	Add Encounter	Modify

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



12. Select Outpatient Referral then click OK.



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- Select Episode [ZZZHUNTER, IOT1] Episodes: Name Type Created Creator Last Reg D (Unattache Add Episode 10/Oct/202 13
- 13. Right-click in the top left-hand corner of the page and select **Add Episode**.

14. Select 18 Week Pathway then click OK.

* Pathway T	уре:		
18 Week W	ait Pathway		~
		14	
		Г	
	(		

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

Episodes:							
Name	Туре	Created	Creator	Last Reg Date	Registrar	End Effective Date	Png
RTD0000000343139082	18 Week Wait Pathway	10/Oct/2023 14:04	HUNTERG5			31/Dec/2100	
Unattached encounters)			U	10/Oct/2023 12:34	HUNTERG5		

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

Using the Correct	Conversation
ls this a New outp	patient appointment
Ver	No

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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
	×	~
ddress Referral Details Gu	uardian/Parental Responsibility Waiting Tin	nes and Status

- 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.

*Source of Referral:	*Referring Clinician:	Referring Organisation:	*Priority Type:	*Booking Type:	Short Notice:
Consultant (NOT A&E) Referral-D 🗸	MacGowan, Guy Andrew	× ·	Routine	Full booking	
*Refer To:	*Lead Clinician:	*Treatment Function:	*List Type:	Main Specialty:	
1. Named Consultant 🗸 🗸	MacGowan, Guy Andrew	Cardiothoracic Tx F.Up ~	Cardiothoracic Tx F.Up (OP) v	Cardiology	
Referral Written Date:	*Referral Received Date:	*Service Type Requested:			
//	10/10/2023	Advice/Consultation ~			
leferral To Treatment Information —					
Pathway Issuer:	Current RTT Status:	Breach Date:	*RTT Status:		
The Newcastle Upon Tyne Hosp 🔍		√ =*/**/**** <u>*</u> ▼	12 Consultant Referral - New Con 🗸		
Scheduling Location					
Hospital Trust:	*Building:	Dept:	*Site Code of Treatment:		
Freeman	EH	EHIOTOPD	This Site		

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

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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**.

4			2023			•	Books	Appointment				
4		1	Octob	er			*Appoir	tment type:				
Мо	Tu	₩e	Th	Fr	Sa	Su	CARDI	OTHORACIC SURGER	RY TX NEW			
25 9 16 23 30	26 3 10 17 24 31	27 4 11 18 25 1	28 5 12 15 26 2	29 6 13 20 2	30 7 14 21 3	1 8 15 22 29 5	*Appoir FHIOT *Patien ZZZHU	tment location: OPD t name: JNTER, IOT1				~ ~
												8 - Consultant
	08.0 08.0 08.3 08.3 08.0 08.1 08.1 08.1 08.2 08.2				CARL		I PROF M	ACGOWAN CARD	FH CARDIAC 1 [0]	FH LUNG CLINIC 1 [0]	PH DPL MCDIARMID CARDIA. 08:00 1, UNDEFINED CARDI 2 08:00 1, UNDEFINED CARDI 2 08:00 1, UNDEFINED CARDI 2 08:30	

## 24. Select Schedule.

Work in progress:	24	
ZZZHUNTER, IOT1		Schedule
		Confirm

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

Resource:			
FH DR FERNANDEZ CARDIAC TX CL			~
Default slot:			
UNDEFINED CARDIACTHORACIC SURG TX (	08:00 - <mark>0</mark> 8:30)		~
Time: 0800 Duration: Hour(s) Distinguish set-up and clean-up durations	Сау 25 ОК	Cance	el

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





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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.

🛱 Confirm									?	×
	MRN: 91651426		DOB: 01/	Jan/80						
Name: ZZZHUNTEF	Age: 43 Years		Gender: N	lale						
CARDIOTHORACICS	Summary General  Correspondence Sch Consultant Comments:  Patient Name ZZZHUNTER, IOT1	Offer Resource View edule Resource:	Guidelines	Notification	Conversation Summaries	Itineraries	Locks	Eligibility	Booking_	
< >>								к	Cancel	Į.

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



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