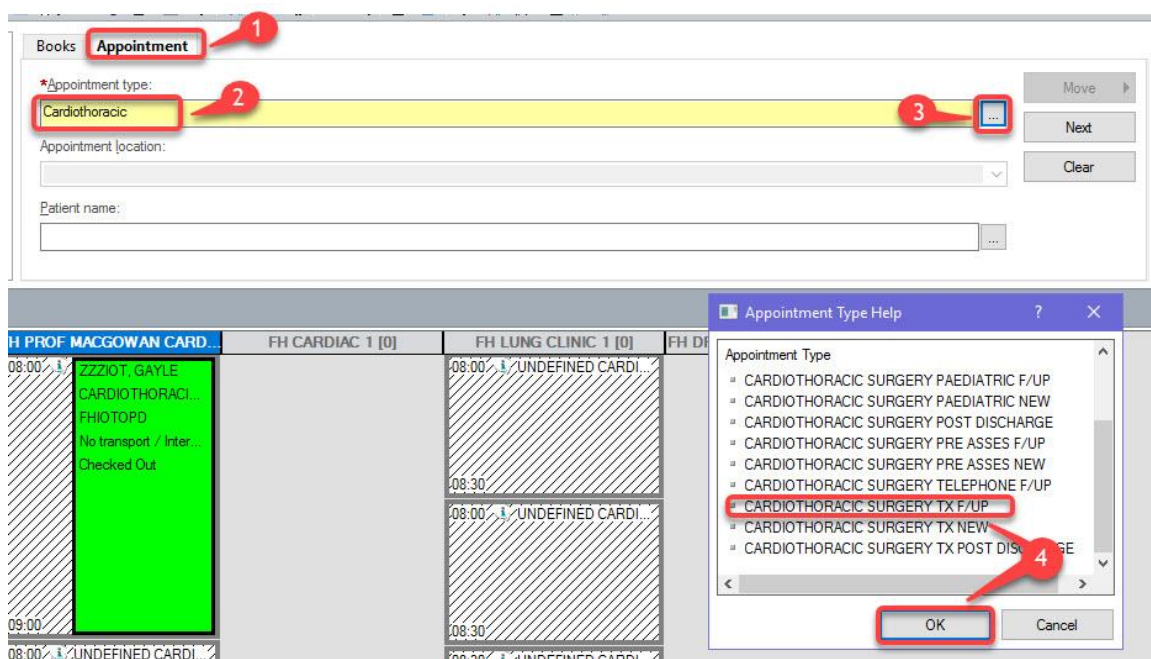


IOT - How to create an encounter for a patient who has had their first appointment

Instructions

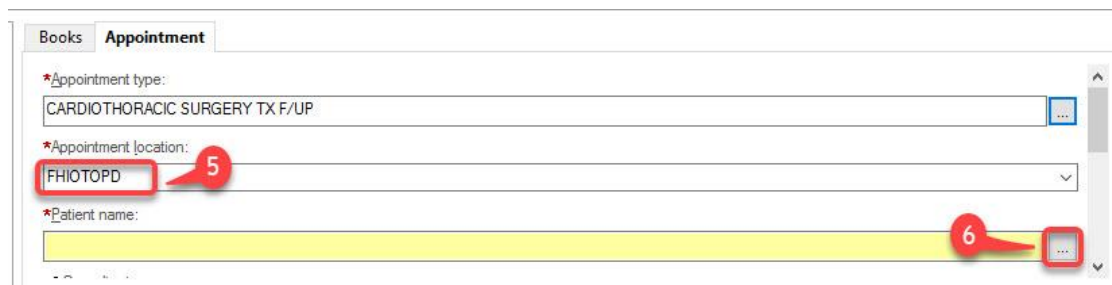
In Schapptbook

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**.



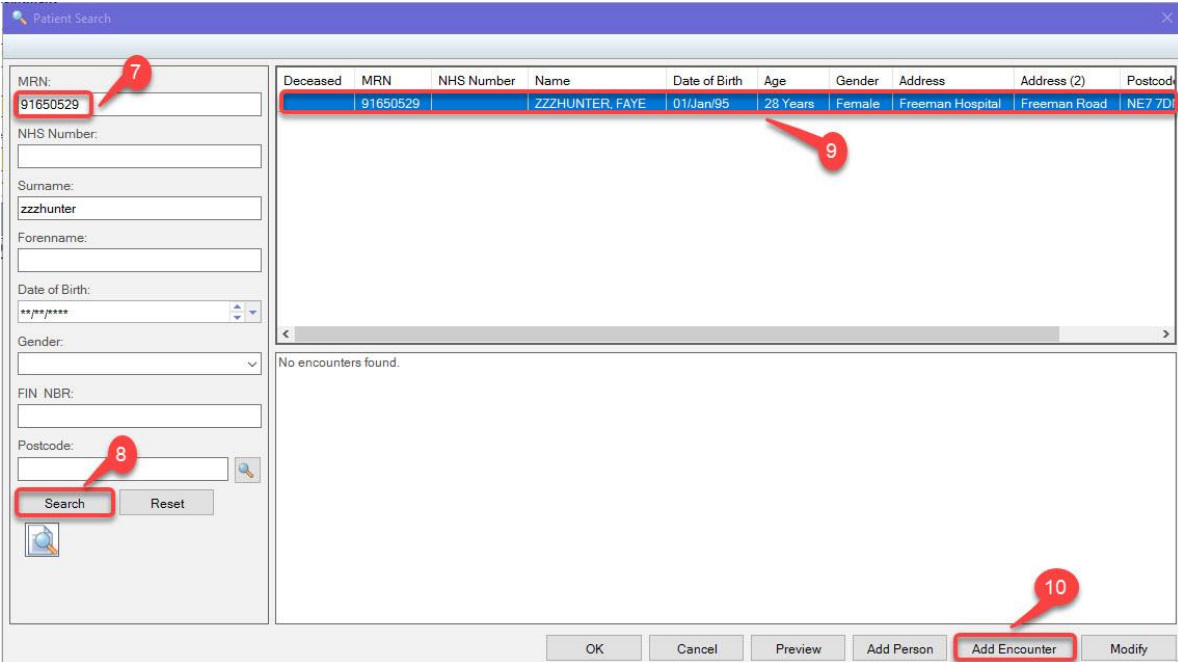
The screenshot shows the 'Appointment' form with the 'Appointment' tab selected. The 'Appointment type' field contains 'Cardiothoracic'. An 'Appointment Type Help' window is open, displaying a list of appointment types. 'CARDIOTHORACIC SURGERY TX F/UP' is selected in the list. The 'OK' button is highlighted.

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.



The screenshot shows the 'Appointment' form with the 'Appointment type' field set to 'CARDIOTHORACIC SURGERY TX F/UP'. The 'Appointment location' field contains 'FHIOTPD'. The 'Patient name' field has an ellipse button next to it.

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: 91650529

NHS Number:

Surname: zzzhunter

Forename:

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

Gender:

FIN NBR:

Postcode:

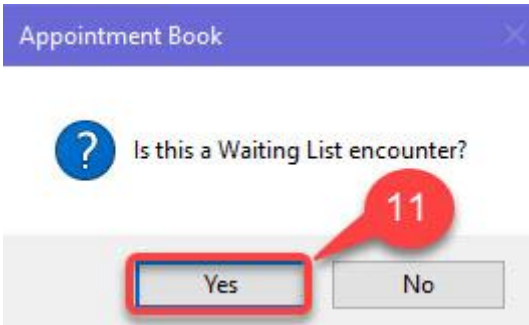
Search Reset

Deceased	MRN	NHS Number	Name	Date of Birth	Age	Gender	Address	Address (2)	Postcode
	91650529		ZZZHUNTER, FAYE	01/Jan/95	28 Years	Female	Freeman Hospital	Freeman Road	NE7 7D

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:

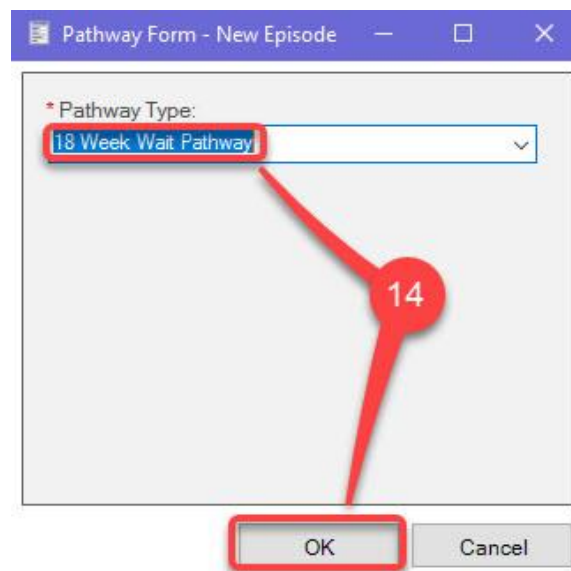
Outpatient Referral

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.

Episodes:

Name	Type	Created	Creator	Last Reg Date	Registrar	End Effective Date
RTD00000000343139297	18 Week Wait Pathway	16/Oct/2023 13:36	HUNTERG5			31/Dec/2100
RTD00000000343022802	18 Week Wait Pathway	23/Jan/2023 12:52	HUNTERG5			31/Dec/2100

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

Using the Correct Conversation

Is this a New outpatient appointment

Yes No

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

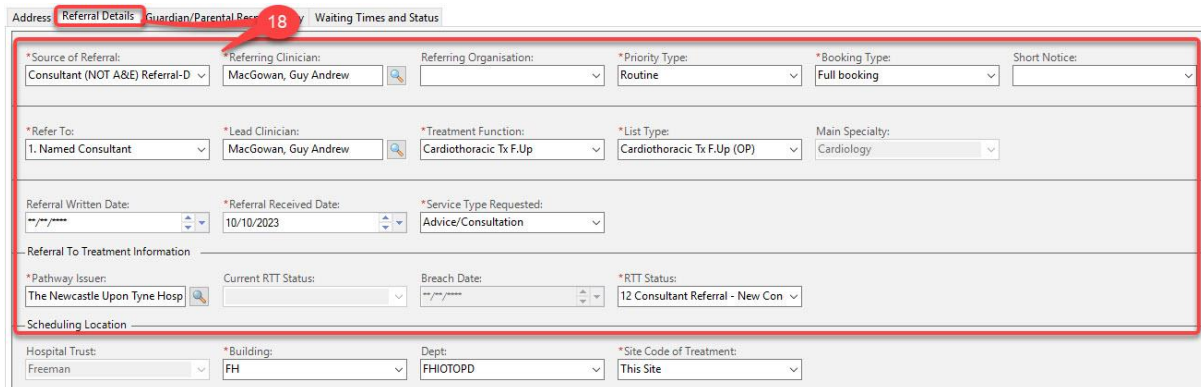
Home Phone Number: 01912345678 Work Phone Number: Extension:

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 Referral 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

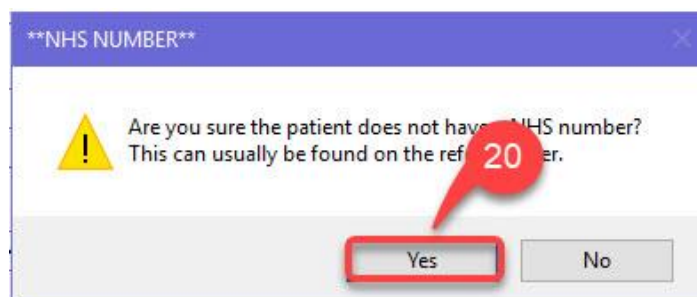
*Pathway Issuer: The Newcastle Upon Tyne Hosp Current RTT Status: Breach Date: *RTT Status: 12 Consultant Referral - New Con

Scheduling Location

Hospital Trust: Freeman *Building: FH Dept: FHITOPD *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**.

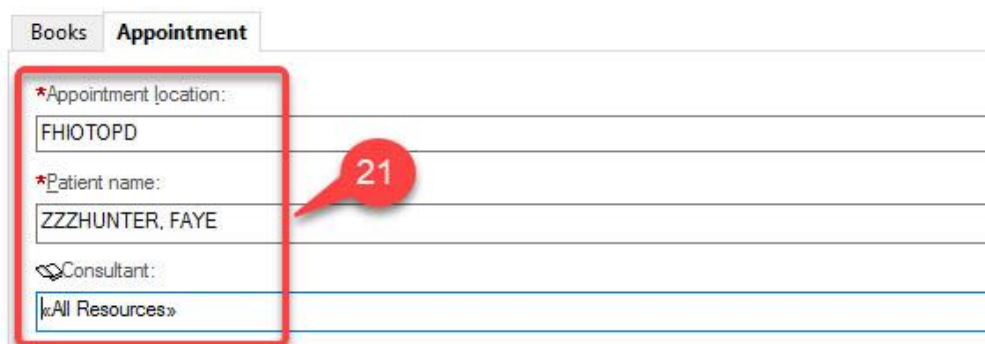


****NHS NUMBER****

Are you sure the patient does not have an NHS number?
This can usually be found on the referral letter.

Yes No

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.



Books Appointment

*Appointment location: FHITOPD

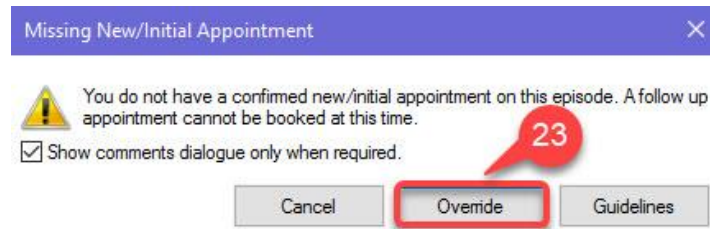
*Patient name: ZZZHUNTER, FAYE

Consultant: All Resources»

22. Click **Move**.



23. Click **Override** in the Missing New/Initial Appointment opening window.



24. Select **Hospital Requested** for the Override reason and then click **OK**.



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

2023

October

Mo	Tu	We	Th	Fr	Sa	Su
25	26	27	28	29	30	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

Books Appointment

*Appointment type:
CARDIOTHORACIC SURGERY TX F/UP

*Appointment location:
FHIOTOPD

*Patient name:
ZZZHUNTER, FAYE

FH DR FERNANDEZ CARDIA... FH PROF MACGOWAN CARDI... FH CARDIAC 1 [0] FH LUNG CLINIC 1 [0]

08:00 UNDEFINED CARDI...
08:05
08:10
08:15
08:20
08:25
08:30

26. Select **Schedule**.

Work in progress:

ZZZHUNTER, FAYE

CARDIOTHORACIC SURGERY TX F/UP

Schedule

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

Schedule - CARDIOTHORACIC SURGERY TX F/UP

Resource:
FH PROF MACGOWAN CARDIAC TX CL

Default slot:
UNDEFINED CARDIOTHORACIC SURG TX (08:00 - 08:30)

Time:
0800

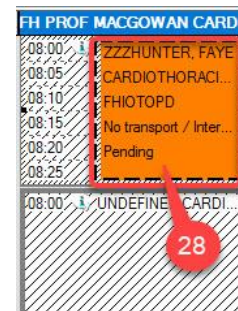
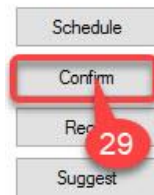
Duration:
Hour(s) 30 Minutes Day

☐ Distinguish set-up and clean-up durations

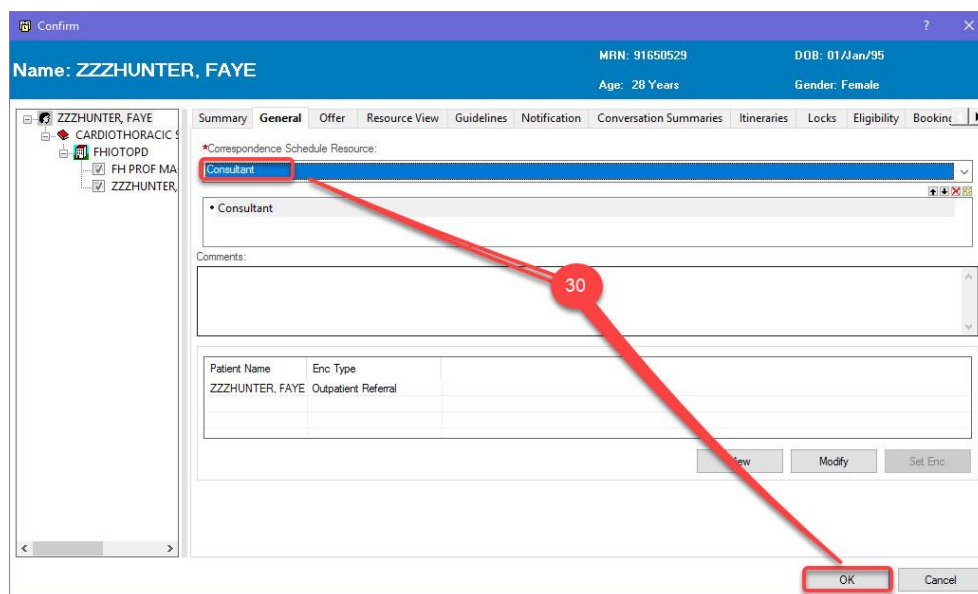
OK Cancel

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

29. Select **Confirm**.



30. 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.



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

