





ESM – Change an appointment type and/or location on a request

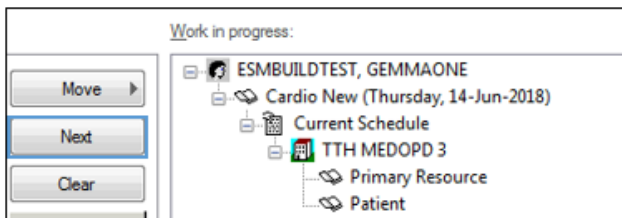


Before entering any information into ESM, patient demographic details must be checked, updated and filed off in HBCIS. **If no updates are required**, navigate to field 26 – History Indicator, add a fullstop and file off. If a full stop already exists remove the fullstop and file off.

1. Click the *ESM scheduling appointment book*  icon from the App Bar.
2. Click on the *appointment inquiry*  icon, go to the *request list* tab and perform an *ESM – request – person* search, click the *ellipsis* and enter the patient's URN. Select your patient and click *OK*, then click *find*. This is where you will locate the existing referral entry.
3. Right click and select *complete request*. Click *OK* at the *appointment attributes* window. The appointment will now appear in the *WIP*.

Change appointment type and/or location

1. Scroll to the *scheduling comments* field and check if there are any comments. If you wish to retain any comments, highlight and copy *Ctrl + C*.
2. Click *next*.



3. If changing the appointment type, overtype the new appointment type and hit enter or click the *ellipsis* button to search.

From:



To:



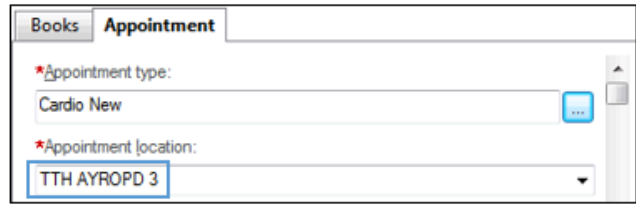
4. If required, scroll to the *scheduling comments* field, enter new comments and if you copied comments previously, paste *Ctrl + V*.

5. If also changing the location, overtype the location and hit enter or click the *ellipsis* button to search.

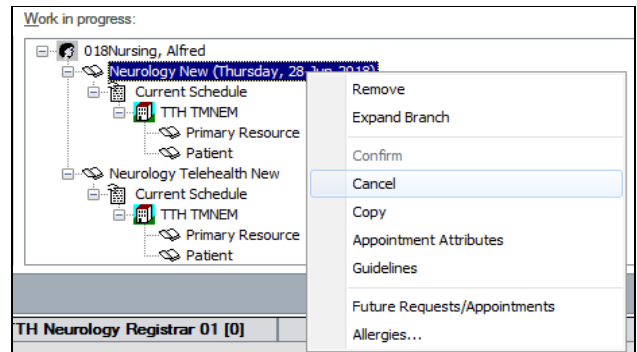
From:



To:



6. Click *move*. You may be prompted to add additional information in the accept format field/s depending on the appointment type. Complete if required (e.g. If changing from New to Review, the referral expiry date must be entered).
7. Click *OK* at the *appointment attributes* window. The correct appointment type now appears in the *WIP*.
8. Right click on the appointment type row in the original request in the *WIP*, click *cancel*.



9. Enter the correct *cancel reason*.
10. You will now only have the correct appointment type/location request in the *WIP*.
11. Click on primary resource and click *request*. The new request list entry will automatically default to the correct request list. Click *OK*.
12. The original request will appear in a cancelled state

Wait List Name	Request State	Appointment Type	Public / Private	Ambulatory Location
Audiology Paed New - TTH	Canceled	Audio Healthy Hearing New	Public	TTH SUROPD 2
Audiology Paed New - TTH	Pending	Audio Paeds New	Public	TTH AUDIO 2