



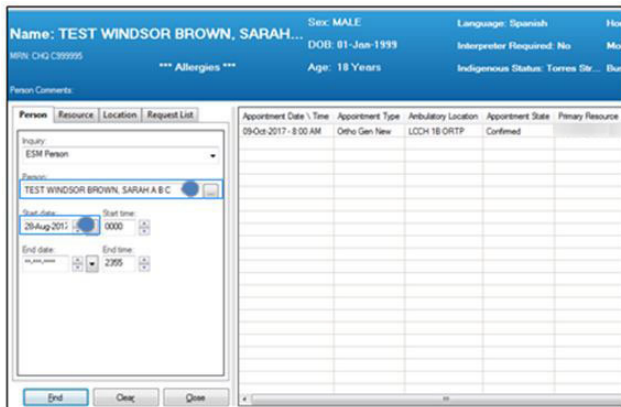


## ESM – Change an appointment type and/or location on an appointment

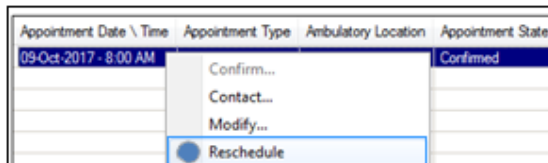
### Change appointment type (and location)

1. Click the *ESM scheduling appointment book*  icon from the App Bar.
2. Click on the *appointment inquiry*  icon, go to the *person* tab and perform an *ESM person search*, click the ellipsis and enter the patient's URN. Enter the *start date* for the search as today (T)\*.

\* If changing a checked-out appointment, backdate the search and ensure you re-checkin/out the appointment.



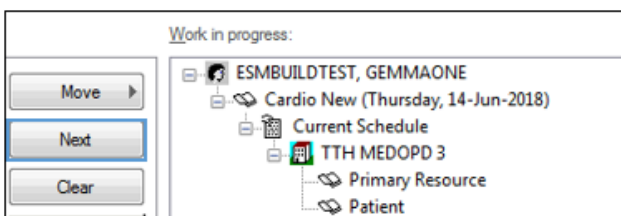
3. Locate the corresponding appointment, right click and select *reschedule*.



4. The *appointment attributes* window appears. Click *OK*. The appointment is now placed in the *WIP*.
5. If changing the appointment type, 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*.

**\*\*If changing location ONLY, skip to the next section - 'Change location only'\*\***

6. Click *next*.

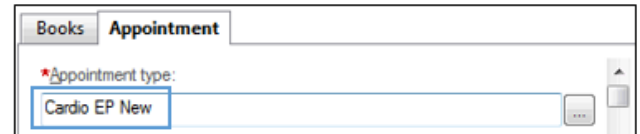


7. Overtyping the new appointment type and hitting enter or clicking the *ellipsis* button to search.

From:

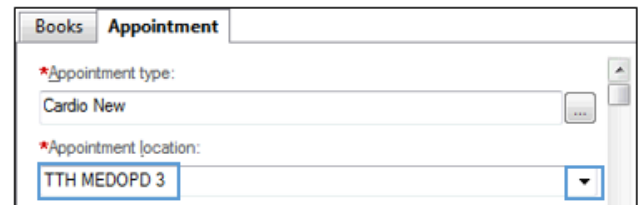


To:

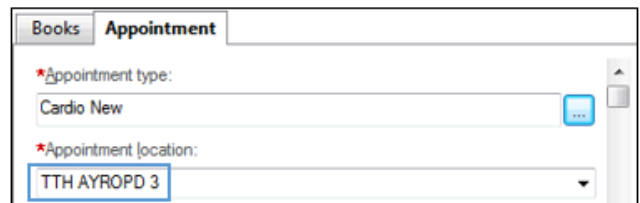


8. If also changing the location, overtype the location and hit enter or click the *ellipsis* button to search.

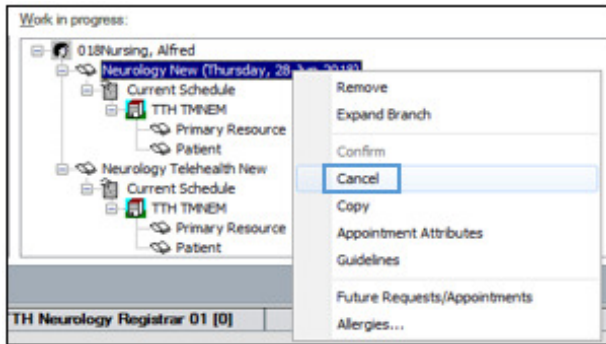
From:



To:



9. If required, scroll to the *scheduling comments* field, enter new comments and if you copied comments previously, paste *Ctrl + V*.
10. 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).
11. Click *OK* at the *appointment attributes* window. The correct appointment type now also appears in the *WIP*.
12. Right click on the appointment type in the original request in the *WIP*, click *cancel*.

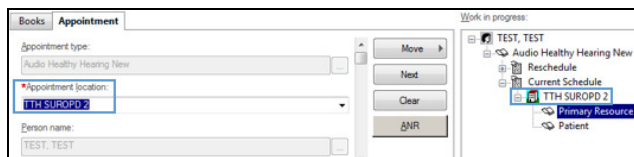


13. Enter the correct *cancel reason* in the cancel window.
14. You will now only have the correct appointment type/location request in the *WIP*.
15. Click on *primary resource* and click *schedule*. In the *schedule* window, select the correct resource and default slot (plus time and duration if applicable). Click *OK*. Alternatively, drag and drop into the grid.
16. The original request will appear in a cancelled state

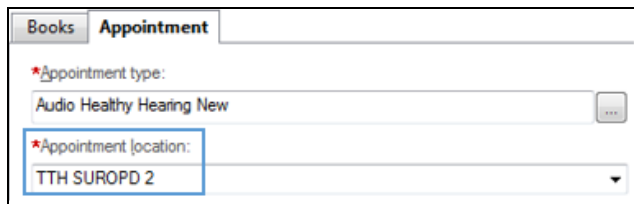
26-Jul-2018 - 8:00 AM	Audio Healthy Hearing New	Cancelled	TTH SUROPD 2
26-Jul-2018 - 8:30 AM	Audio Paeds New	Confirmed	TTH AUDIO 2

## Change location only

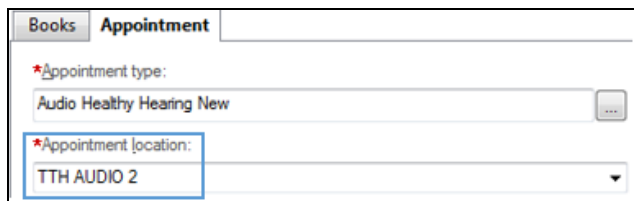
6. Overtyping the *appointment location* and hitting enter or clicking the *ellipsis* button to search.



From:

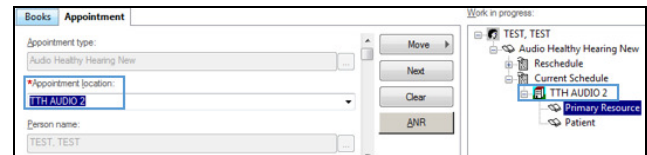


To:



7. If required, scroll to the *scheduling comments* field to enter new comments.
8. Click *move*.

9. The appointment will now have the amended location appear in the *WIP*.



10. Select the correct date on the calendar for the appointment *reschedule*.
11. Click on *primary resource* and click *schedule*. In the *schedule* window, select the correct resource and default slot (plus time and duration if applicable). Click *OK*. Alternatively, drag and drop into the grid.
12. Click *confirm*. Ensure details are correct in the confirm window. Click *OK*.
13. Select a *reschedule reason* in the reschedule window. Click *OK*.
14. The original request will appear in a rescheduled state

25-Jan-2019 - 8:50 AM	Audio Healthy Hearing New	Rescheduled	TTH AUDIO 2
25-Jan-2019 - 1:00 PM	Audio Healthy Hearing New	Confirmed	TTH SUROPD 2