ESM – Action a check in and check out

Note: Before performing any action in ESM, patient demographic details must be checked and updated in the HBCIS Patient Registration screen. The HBCIS screen must be filed off to ensure ESM is updated with the current patient details.

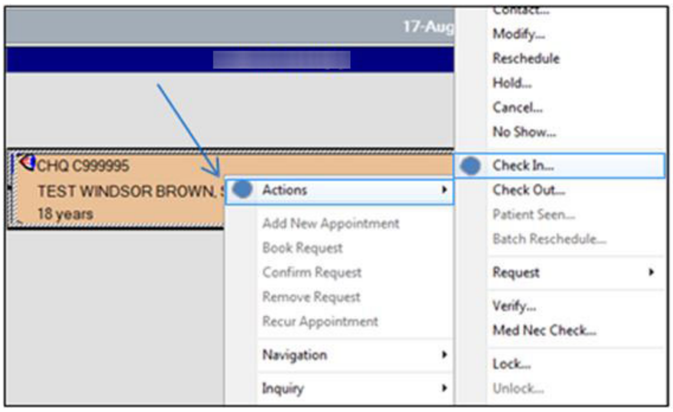
There are two ways to check patients in for their appointment in ESM, depending on your role within the department:

- directly through the *appointment grid,* or
- through the *person inquiry* search.

Action a check in

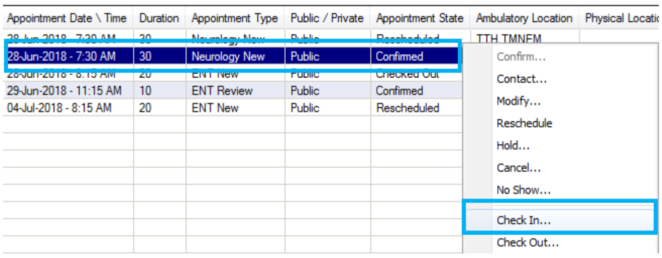
Appointment grid check-in

1. Locate the appointment in the relevant *book*. Right click on the Appointment, select *actions*, *check in*.

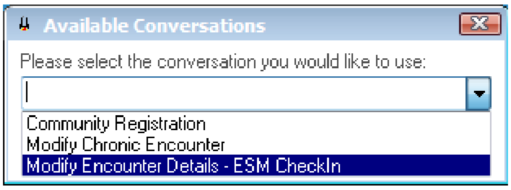


Person inquiry search check-in

1. Locate the patient through the *ESM person* search and selecting the *start date* as today (*t*). Select the correct appointment, right click the appointment and click *check in*.

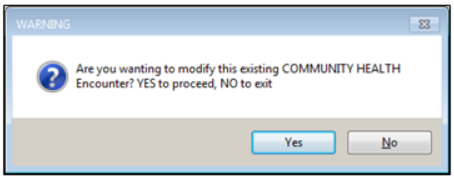


2. Review tabs on the *check in window* and modify details as required. Please note, if you are checking in a *retrospective appointment the date and time of appointment should be backdated*. Click *OK*.
   - An encounter should already be set for the appointment.
   - If no encounter is set, the system will prompt the user to create one after pressing *OK*.
   - The appointment time (*date* and *time* fields) can be modified by clicking in the field or using the up and down arrows.
3. Select the correct encounter from the *available conversations* window.

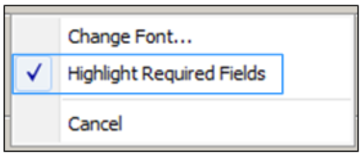


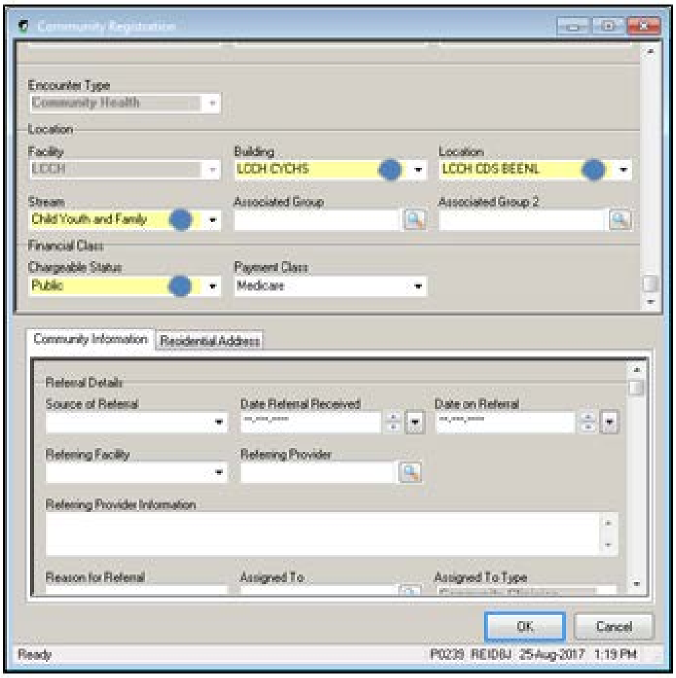
Option 1: community encounters

1. Select *community registration*, *OK*.
2. Modify this existing *community health* encounter, *yes*.



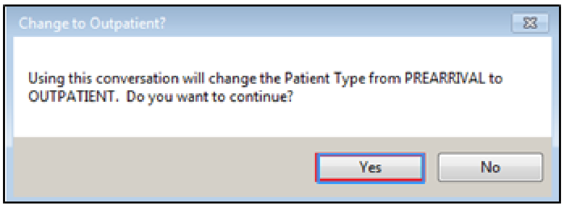
3. In the *modify encounter, ESM check in* window, ensure all mandatory fields (fields shaded in yellow) are completed.
4. If there are no yellow fields showing, right click in the grey area and select *highlight required fields*. Update fields, *OK*.



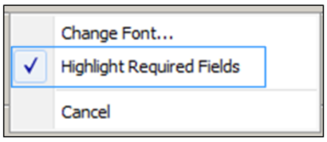


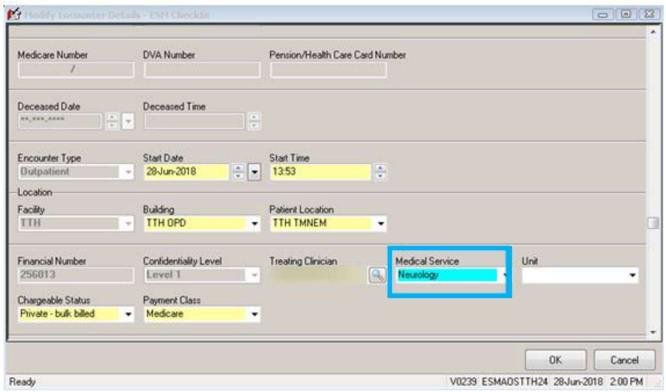
Option 2: pre-arrival encounters

1. Select *modify encounter details – ESM check in*, *OK*.
2. For pre-arrival encounters, a *change to outpatient* box will open asking if you want to modify the encounter. Select *yes*.

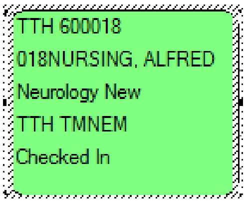


3. In the *modify encounter*, *ESM check in* window, ensure all mandatory fields (fields shaded in yellow) and the *Medical Service field are* completed.
4. If there are no yellow fields showing, right click in the grey area and select *highlight required fields*. Update fields, *OK*.





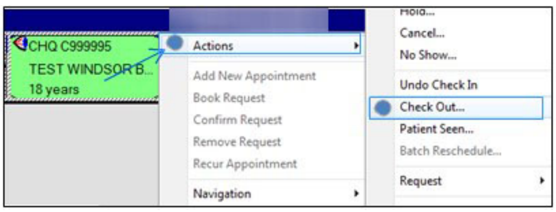
5. The patient/client appointment is now *checked in* and appears green in the *appointment grid*.



Action a check out

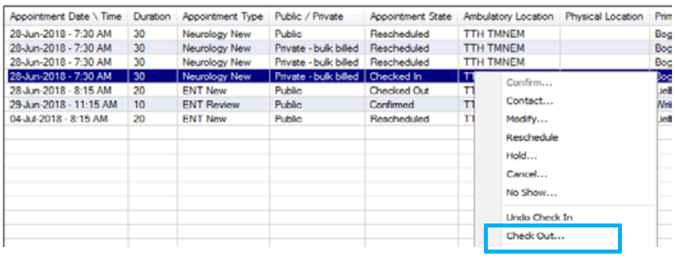
Appointment grid check out

1. Locate the appointment in the relevant *book*. Right click on the *appointment*, select *actions*, *check out*.

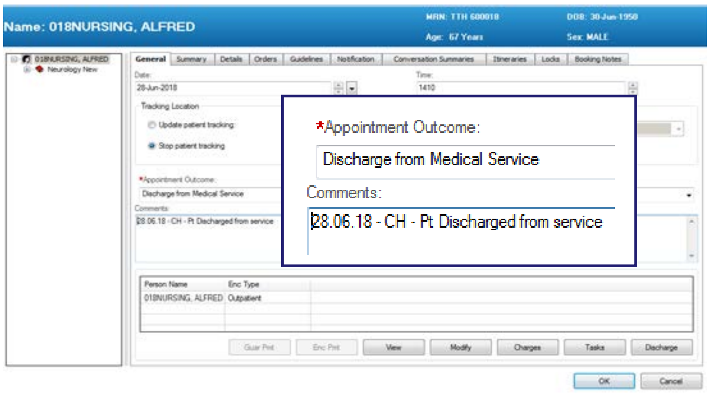


Person inquiry search check-out

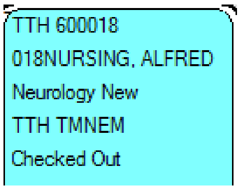
1. Locate the patient through the *ESM person* search and selecting *start date* as today (*t*). Right click the appointment and click *check out*.



2. On the *check out* window, complete the *appointment outcome* field, ensuring an *action comment* is also recorded (e.g. 28/06/18 – CH - Patient Discharged from service)
   - The appointment time (*date* and *time* fields) can be modified by clicking in the field or using the up and down arrows.
   - For *community encounters*, if the patient is being discharged, the *discharge* button must also be selected prior to pressing *OK*.

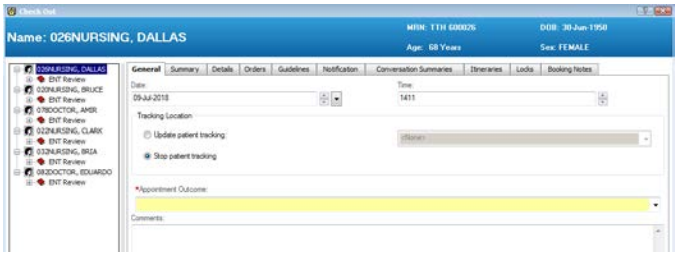


3. If the chargeable status of the client needs updating from public/Medicare (e.g. if the patient is being bulk billed or if the patient is *Medicare ineligible*), the encounter must be updated. If so, *click modify*. To update *payment class*, update *chargeable status* and *payment class*. Click *OK*.
4. The patient/client's appointment is now *checked out* and appears teal in the *appointment grid*.



Bulk check out

1. Locate the appointments in the relevant *book*.
2. Hold down the Ctrl key and select all appointments requiring check out.
3. Right click and select *actions*, *check out*.



4. The *check out* window will open and each paient will be listed on the left-hand side.
5. Highlight the first patient and select the appropriate *Appointment Outcome* and *comments*.
6. Select the next patient on the left-hand side and continue down until all patients have an *Outcome* and *comments*
7. Select *OK*
8. All selected appointments will appear as *Checked Out* and blue in the grid.