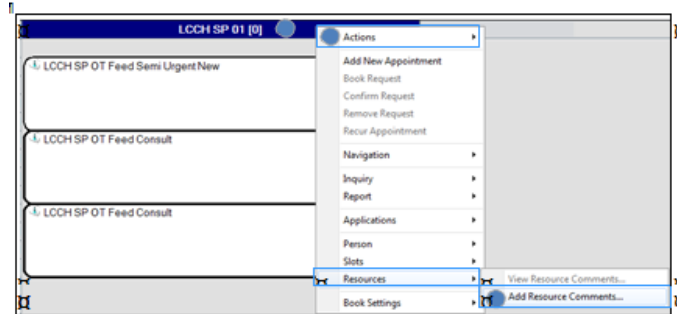




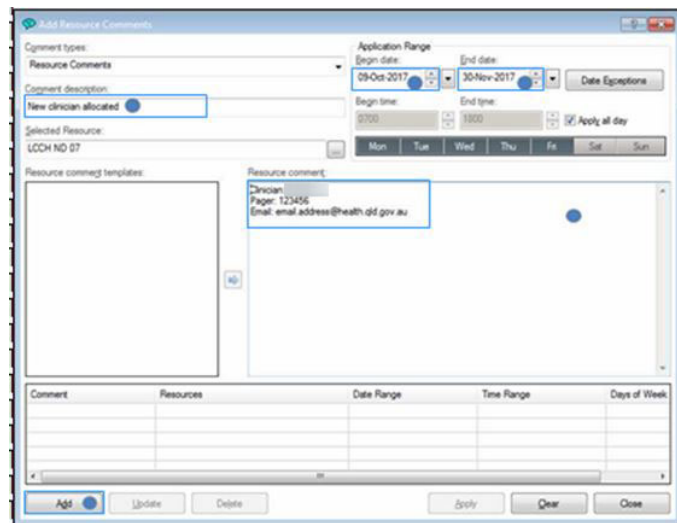
ESM – Add comments for resources, person and slot

Add resource comment

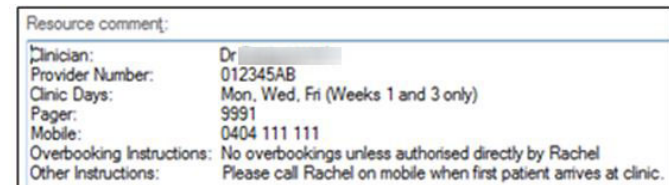
1. Navigate the appointment books to locate the *resource*.
2. Right click on the *resource* name.
3. Select *resources – add resource comments*.



4. Complete the below:
 - *comment description*
 - *begin date* and end date (for long-term resources - *end date* two years in the future)
 - *resource comment*.



OPTIONAL It is strongly recommended that specific clinic information relevant to that resource is added (e.g. clinic weekly schedule, clinician referral categorisation processes, etc.).

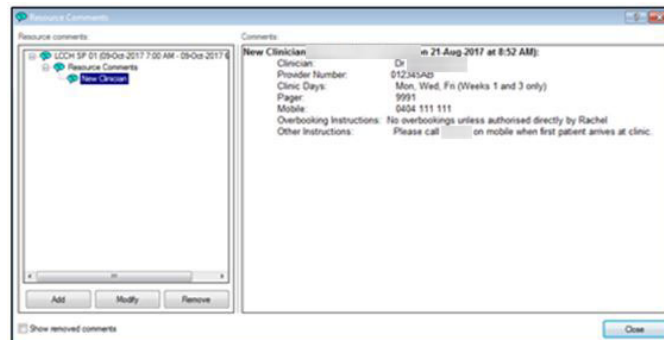


5. Select *add*, and then *apply*.
6. A resource comment is now visible on the banner of the resource. Please note, the resource comment will now

appear in the all relevant books.

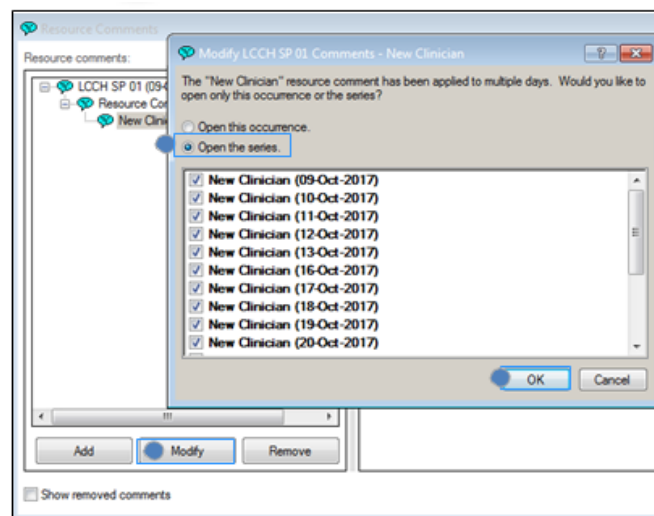


7. The *resource* name/comment is now available by single clicking on the *bubble* in the resource name heading.



Modify resource comments

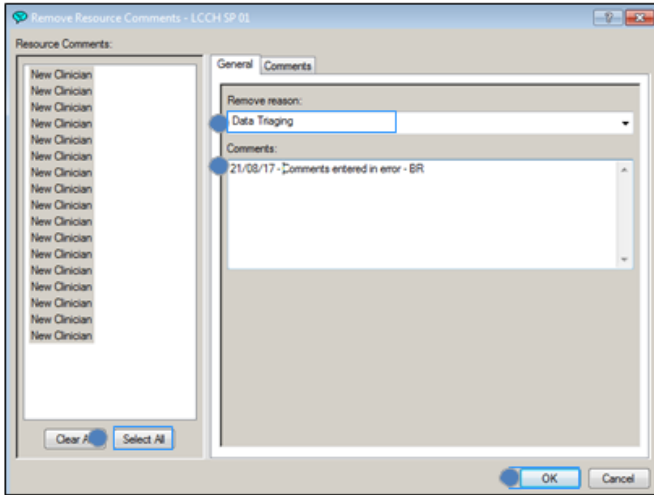
1. Click on the *resource comment* bubble, select the name of the comment, *modify, select all*. This will allow you to modify the series. If you wish to only modify a single comment, select *open this occurrence*.



2. Over-key the comment accordingly. If you wish to add a comment, tick the *add to beginning/end of comments* checkboxes.

Remove resource comments

1. Click on the *resource comment* bubble, select the name of the comment, *remove, select all*. This will allow you to modify the series. If you wish to remove a single comment, select *open this occurrence*.



2. Select a *remove reason* (e.g. data triaging). Enter a comment into the *comments* field, *OK*.

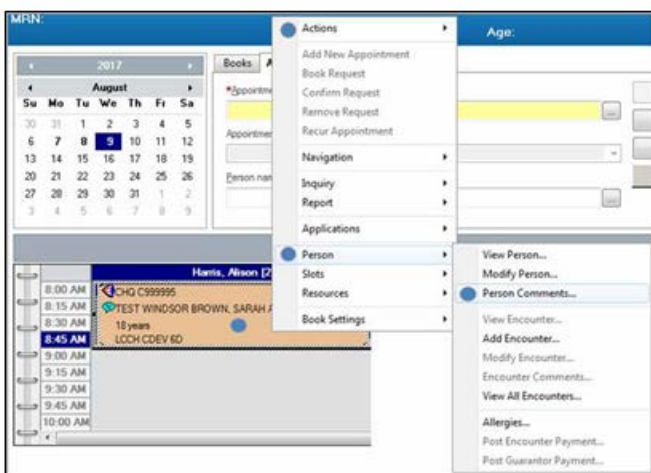
Resource comment considerations

- Resource comments appear across all locations for the resource. Do not remove the resource comments for another location.
- Do not remove historical resource comments. Modify only future comments.

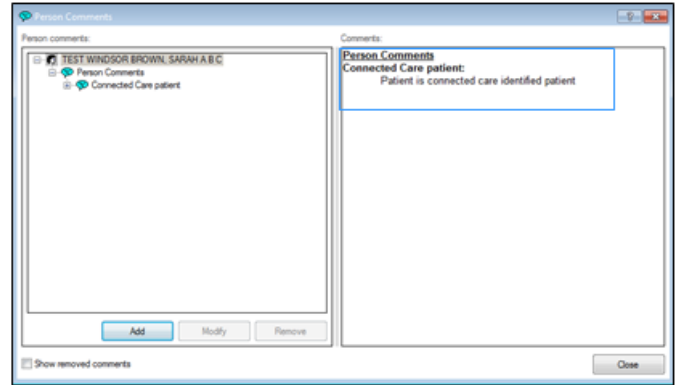
Person comments

Add person comments

1. Right click on the *scheduled appointment* and click *person* and then *person comments*. Another way to access these comments is to perform a *person inquiry* search.

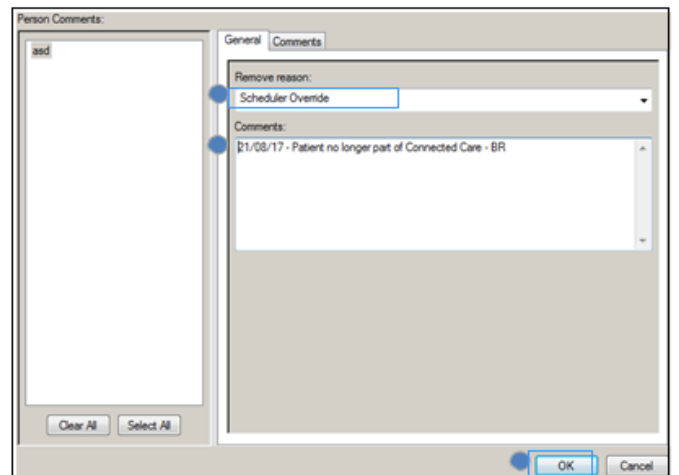


2. Person comments now appears in the banner bar as per below. To view the scheduling comments, click the *blue speech bubble*.



Remove person comments

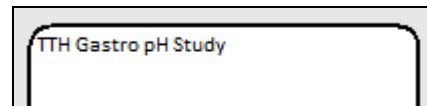
1. Click on the *person comment* in the patient banner bar. Click on the *comment*.
2. Select *remove*, choose a *relevant remove* reason (eg. Scheduler override) and type action *comment*, *OK*.



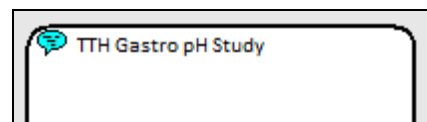
Add slot comments

1. To add a slot comment, right click on the *slot*, and click *slots* and then *slot comments*.
2. Add your slot comment and click *OK*.

Before:



After:



3. To read the slot comments, click on the blue speech bubble.
4. To remove a slot comment, right click the slot comment and delete the text.