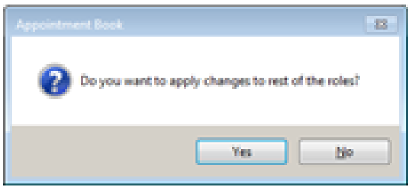
ESM – Correct a patient-resource mismatch error

Note: Always select yes if a *Do you wish to apply changes to the rest of the roles?* warning box appears. If you click no, the patient will still be booked at the original time. However, the patient will not appear in the clinician's schedule and as a result, the patient will present at the wrong date or time and overbooked clinics will occur.

A patient-resource mismatch error window occurs when the following three actions are performed:

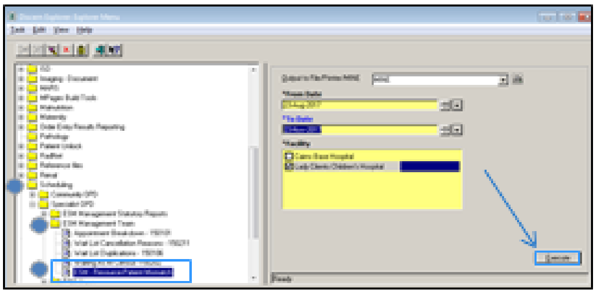
- an appointment is scheduled (*scheduled* status)
- the appointment time is then changed before clicking *confirm*
- when the *'Do you wish to apply changes to rest of the roles'* button is clicked and the user clicks *no*.



Outpatient Management team will run a weekly report for all patients that have a recorded *mismatch* through the *Discern Explorer* menu.

Execute the patient mismatch report

1. *Load Discern Explorer: Explorer Menu*, select *scheduling, Specialist OPD, ESM Management Team*, and *ESM – Resource – Patient Mismatch* report. Click *execute*.

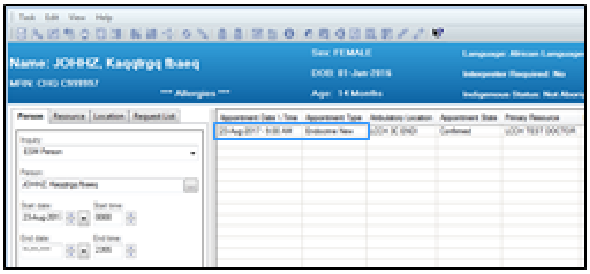


2. Save the report as a text file, then import into Microsoft Excel.
3. Review the data export and forward to appropriate clinic(s) to action. *The beg date time* field indicates the time the patient is scheduled for the appointment. This will not match with the clinician schedule.

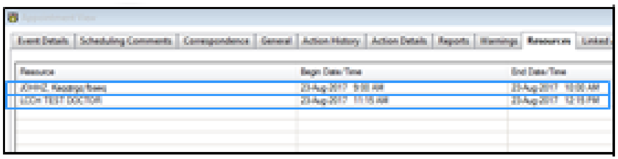
Action the patient mismatch report

The ESM – Resource – Patient Mismatch report should be actioned by the appropriate clinic staff (as directed by your team leader).

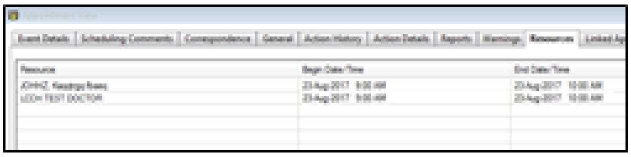
1. Load the *ESM – Resource – Patient Mismatch* report and action each patient record that has a mismatch. This report indicates all resource-patient mismatches for the previous two weeks and upcoming 12 weeks.
2. Perform *a person* search to locate the corresponding appointment in the report.
3. Double click on the appointment in question.



4. To check the mismatched times that have been allocated to the *patient* and the *resource*, click the *resources* tab. One of these appointment times should be selected as the correct one and updated accordingly. Record the correct time (resource or patient).



5. Close the window
6. Right click on the appointment and select *Reschedule*. Select *Yes* to keep the association.
7. The appointment will now display in the *WIP*, *schedule* the appointment into the correct appointment *resource* and *time*.
8. *Confirm* the appointment
9. Enter a *reschedule reason* and *action comment*.
10. Double click in the appointment and on the *resources* tab (as per Step 3) and the schedules will align.



The patient mismatch has now been corrected.