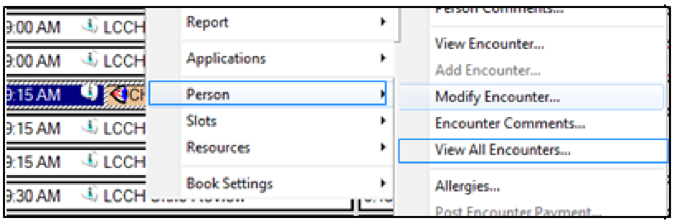
ESM – Encounter Management

Note: Encounters determine the location of appointment information in the electronic medical record and the funding of services in ESM.

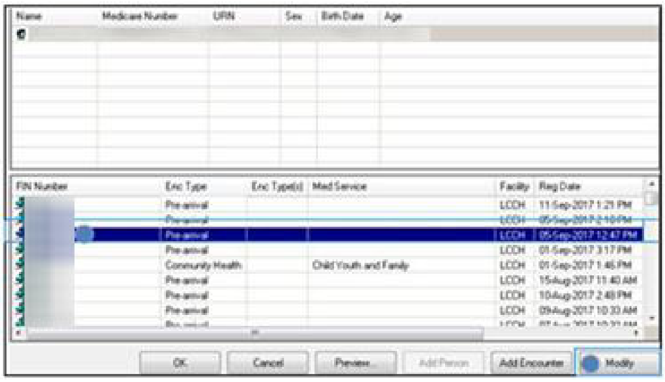
Encounter modification

1. Click the *scheduling appointment book* icon in the *AppBar* to load ESM. Click the *appointment inquiry* button to search for the appointment, or locate the appointment in the *appointment grid*.

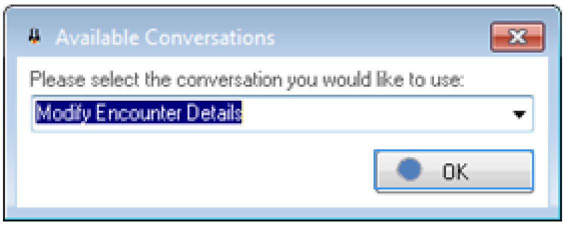
2. If you have previously created an encounter and require a modification, right click the *appointment*, *person*, *view all encounters*.



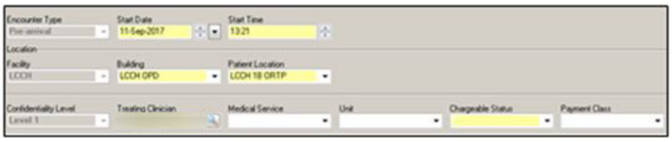
3. Right click on the encounter you wish to modify and click *modify*.



4. When the *available conversations* window opens, select *community registration* for community encounters, or *modify encounter details* for all other encounters. Click *OK*.



5. You can modify any of the available fields including:
   - *start date* and *start time*
   - *building* and *patient location*
   - *treating clinician*
   - *chargeable status* and *payment class*



Please note: If the encounter is selected against the incorrect location, refer to *encounter location change*.

Encounter location change

Before you modify an encounter based on location, please ensure there isn't an encounter already created for the correct location (refer to steps 1-2 under *Encounter modification*).

No other encounter for same location available:

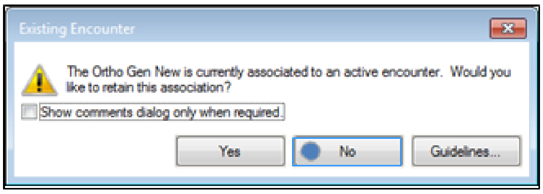
- Continue to modify the encounter (steps 3-5).

Another encounter for same location is available:

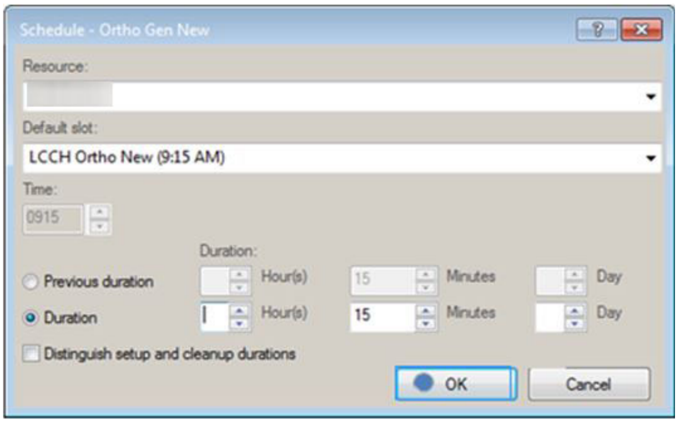
- Refer to Incorrect encounter selected section
- If the previous encounter was created in error, it may need to be discharged (deactivated). Refer to *Discharging unused encounters*.

Incorrect encounter selected

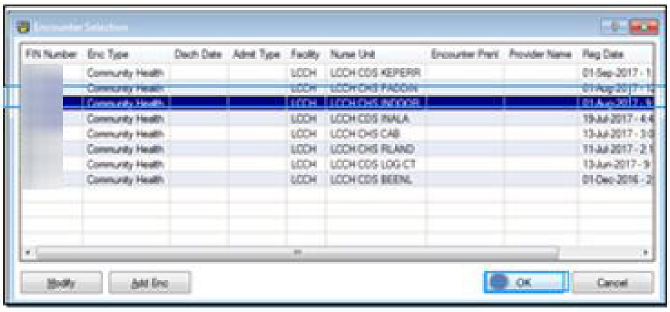
1. Drag the appointment to the *work in progress (WIP)* box. When the existing encounter window displays, select *no*.



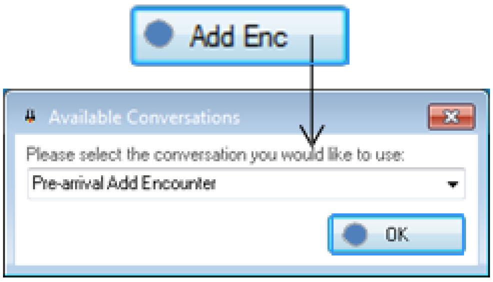
2. Select the appointment slot that the appointment is currently booked into. With the appointment currently in the WIP, click *schedule*.
3. Ensure the *duration* is the same as the original appointment. Click *OK*.



4. Click on *confirm* next to the *WIP*. When the *confirm* box opens, click on the *general* tab, click the *set enc* button to add a new encounter.
5. When the *encounter selection* box opens, either select the correct encounter or add a new one:
   a. **Select current encounter in list**: Select encounter from the list you wish to use, click *OK*. The encounter is now set. Click *OK* to close the window.



   b. **Create a new encounter**: Click the *add enc* button at the bottom of the box. When the *available conversations* window appears, select the corresponding encounter. Click *OK*



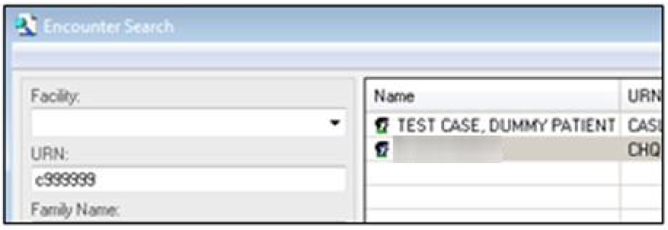
6. Enter the encounter details as appropriate for your appointment (community registration or pre-arrival appointment).

Discharging unused encounters

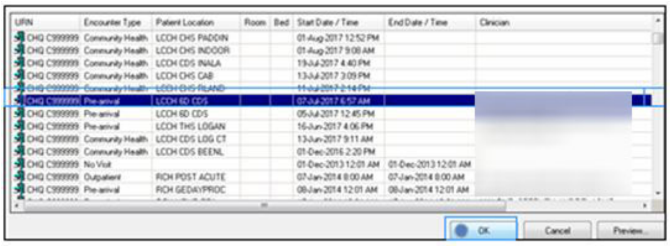
Pre-arrival and *community registration* encounters do not automatically discharge. If you have created one of these encounter types accidentally, you will need to manually discharge the encounter.

1. From the toolbar, load the *Launches PMLaunch*.

2. In the *available conversations* window select *discharge encounter* option, and *OK*.
3. Select the correct patient from the search boxes or enter the FIN number.



4. A list of all encounters associated with the patient will appear at the bottom of the screen. The open encounters do not have an *end date/time*. Select the encounter you wish to *discharge* based on *patient location* and *encounter type*. Click *OK*.



5. The *discharge encounter* window will appear. Ensure you have selected the encounter and click *OK*.
6. The encounter has now been deactivated *(discharged)* and has an end-date.