

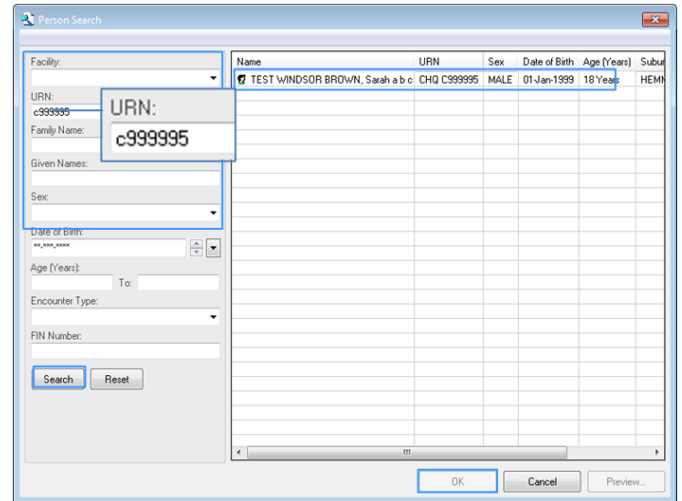
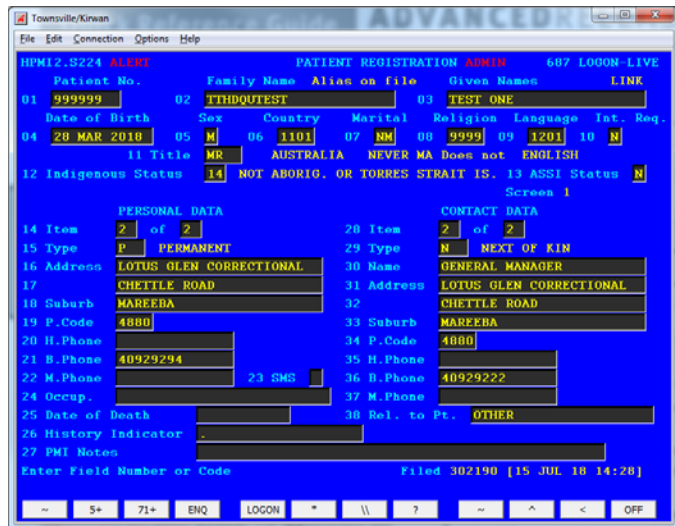


ESM – Request List and Appointment Search

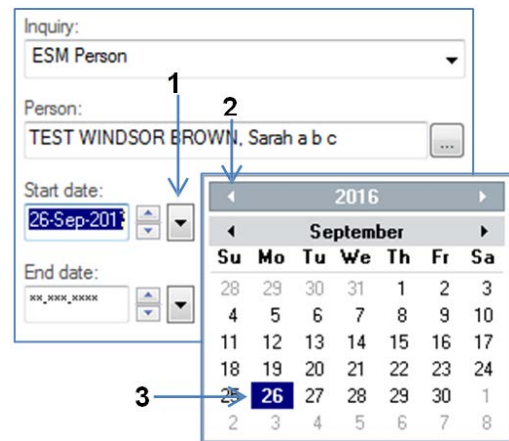
This guide documents how to perform a search for previous or upcoming appointments and request list (wait list) entries. This may be useful for staff if assisting patient enquiries regarding booked appointments or placement on waitlists.

Always search HBCIS to locate or create a Unit Record Number (URN)

1. Open *HBCIS*, navigate to the *patient registration* screen and locate the patient using thorough patient searches. Ensure all demographic information is correct and updated accordingly. **If no updates are required**, navigate to field 26 – History Indicator, add a fullstop and file off. If a full stop already exists remove the fullstop and file off.
2. Make a note of the patient’s URN.



5. Click on the drop-down arrow next to the *start date* field. When the calendar appears, change the year back one year and click on the highlighted date. This will ensure you are searching for all previous appointments for the last 12 months in addition to all future booked appointments.



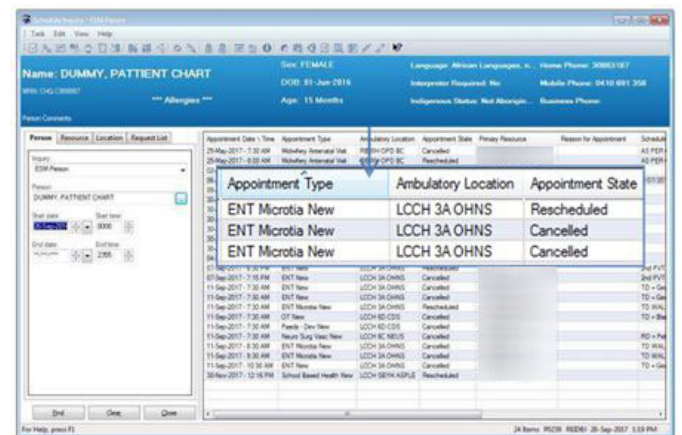
6. Click *find*. The search results will appear in the results pane on the right. You can *sort* any fields by clicking on the column heading (e.g. to view all similar specialty appointments, click on the *appointment type* heading).

Patient appointment search

1. Click the *scheduling appointment book* icon in the *AppBar* to load ESM if you are an AO or click *scheduling appointment book* directly from *Powerchart*.
2. Click the *appointment inquiry* button.



3. Click on the *person* tab and ensure the *inquiry* is set to *ESM person*. Click the *ellipsis* button next to the person box to commence a patient search.
4. Enter the TTH patient unique reference number (*URN*). If this is not known, you can search for the patient by entering *surname, first name, date of birth* then *search*. When the results appear, select the correct patient from the results pane (ensuring the URN commences with a TTH, checking name and DOB) then *OK*.



- **Appointment type:** The booked appointment.



- **Ambulatory location:** The location where the service took place or will take place.
- **Appointment state:** Current status of the appointment. The options include:
 - Confirmed**
 - Scheduled**
 - Attended
 - Cancelled
 - Rescheduled
 - No Show

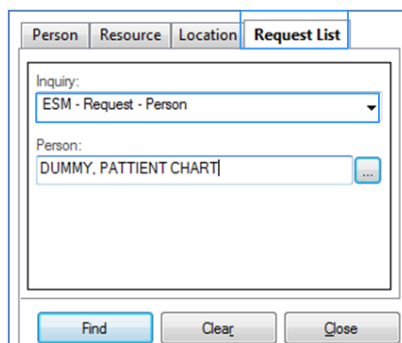
** Patient has not yet attended an appointment

- **Reason for appointment:** The clinical referred conditions as indicated by the triaging clinician.

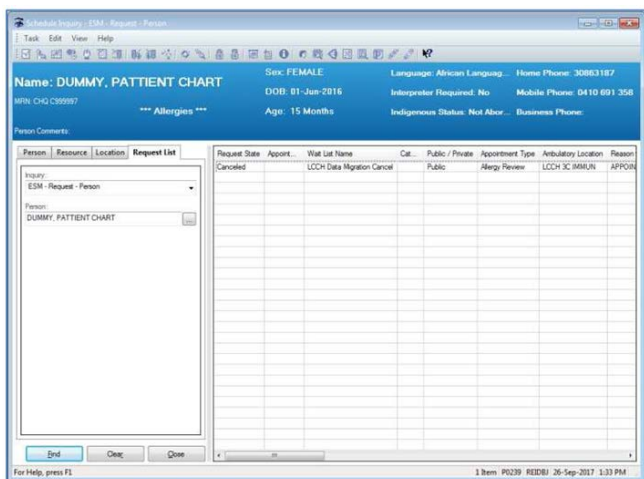
***As per QRG 'Set Inquiry Window Preferences' – the columns can be reordered according to individual preferences**

Patient request list (wait list) search

1. After performing an *ESM person* search (*inquiry*), you can perform a request list search by clicking on the *request list* tab. Change the *inquiry* to *ESM – request – person*. The patient information will remain in the box if performed from a previous search. Click *find*.



2. The patient request list entries (past and current) will appear in the results pane to the right.



- **Request state:** Current status of the appointment. The options include:

- Pending (currently on wait list)
- Complete (request was scheduled)
- Cancelled (request list entry was cancelled)

- **Ambulatory location:** The location where the service took place or will take place.
- **Appointment state:** The linked appointment current status (see page 1)
- **Appointment type:** The booked appointment.
- **Wait list name:** The name of the request list that the patient is currently associated to for the appointment type.

Request list (wait list) search by Specialty

1. Click the *scheduling appointment book* icon in the *AppBar* to load ESM if you are an AO or click *scheduling appointment book* directly from *Powerchart*.
2. Click the *appointment inquiry* button.



3. Click on the *request list* tab and ensure the *inquiry* is set to *ESM – request – standard*. Search for the applicable request list in the *request list queue*.
4. Click *find*. The search results will appear in the results pane on the right. You can *sort* any fields by clicking on the column heading (e.g. to view the requests in order of category, click on the *category* heading).

Category	Days Waiting	Name	MRN	Reason for Appointment	Appointment Type	Ambulatory Location
2	415	NERRIG, ANZ	RBWH 1901749	15.2.17 upgraded to CAT.	Dermatology New	RBWH OPD SKIN
3	744	RKIGN, BAEZEZ APRIJAGURE	RBWH 8970001		Dermatology New	RBWH OPD SKIN
3	743	BTJG, ECREQ HAUDRPP	RBWH 3107165		Dermatology New	RBWH OPD SKIN

***As per QRG 'Set Inquiry Window Preferences' – the columns can be reordered according to individual preferences**