



ESM – Scheduling a chart review appointment

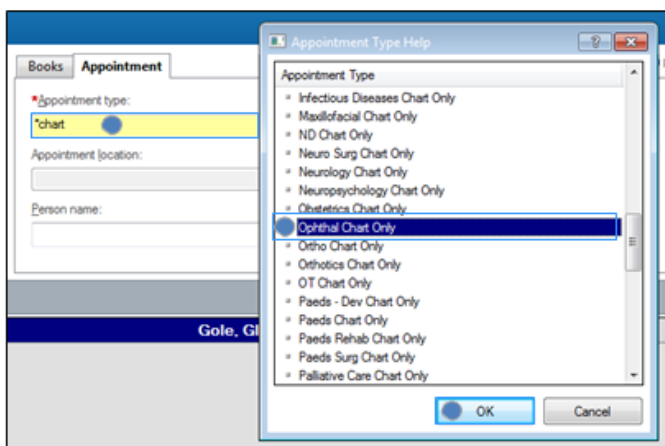
Chart only appointments can be scheduled for a clinician to:

- review a patient’s record, respond to a patient query or complete a medical certificate (at the discretion of the clinician)
- record non-claimable activity for outreach services

Chart only appointments may not be an endorsed process for your local business unit. If you are unsure about using chart only, please check with your line manager.

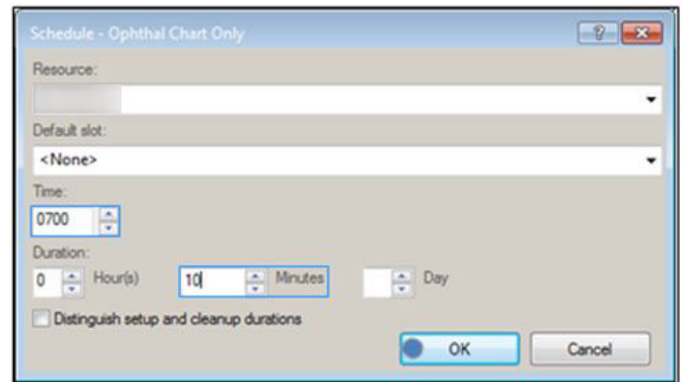
Please note:
Chart reviews are excluded from funding.

1. Locate the relevant *book* to schedule the chart only appointment. In the *appointment type* box, type a wildcard (*) and the word “chart” (i.e. *chart). Click the *ellipsis* button, select the relevant specialty from the list and click *OK*.

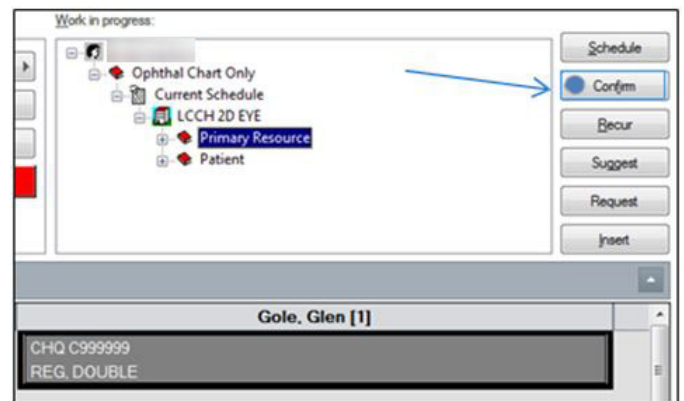


Clinician review chart only

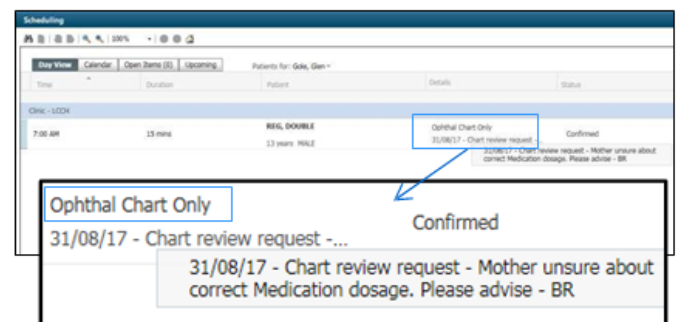
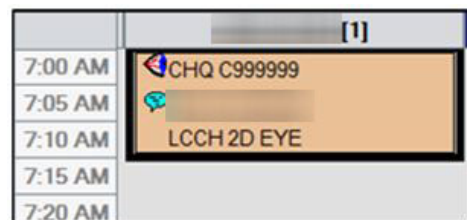
2. Complete all relevant *accept formats* for the chart only appointment as follows:
 - appointment location*
 - person name*. Please note, an encounter should never be selected for chart only appointments
 - scheduling comments*. This is the clinical handover and request that is being provided to the clinician. Ensure clear concise and specific information is requested (e.g. 31/08/17 – BR – Chart review request – Sally’s mother is unsure about the correct Medication dosage. Please advise).
3. Click *move* to move the appointment to the *WIP* box. Click *schedule*. Ensure the *time* is set at “0700” and the *duration* is set at “15” minutes. Click *OK*.



4. The appointment now appears in a grey scheduled status in the *appointment grid*. Click *Confirm*, *OK*.



5. The *chart only* appointment is now in a *confirmed* status and will be visible in PowerChart scheduling view. When the clinician hovers over the appointment, the *scheduling comments* will appear for the clinician.



6. On the day of clinic, chart only appointments **do not** need to be *checked in* or *checked out*.

Outreach appointment - chart only

Follow steps 1-6 with the following variations:

- The *chart only* appointment type should be scheduled to the same *date*, *time* and *duration* as the outreach appointment.
- The appointments do not need to be *checked in* or *checked out*



- If a clinician wishes to record notes into the patient's ieMR, a corresponding *encounter* can be selected. If no relevant encounter exists, a new *manual encounter* will need to be created.