



ESM – Scheduling inpatient appointments



Note: ESM should not be used to schedule admitted patients, however if a clinician requests an admitted patient receive treatment in an outpatient setting, they can be entered using the inpatient encounter or booking a chart only appointment. Both options will exclude the appointment from MAC reporting.

Click the *scheduling appointment book* icon in the *AppBar* to load ESM. Click the *appointment inquiry* button.



Click the *request list* tab and select *ESM – request – person* from the *inquiry* drop-down list and click *find* to check if the patient already has a request for the **same condition**.

1. Patient does not have an existing request

Option 1. Do not add pre-arrival encounter

1. Enter a standard appointment type (e.g. Neuro Surg New etc) and location.
2. Click the *person name ellipsis* button. The *person search* window will open. Enter the patient URN as per HBCIS and click on the correct patient.
3. Click *OK* (i.e. Do not select *add encounter*).
4. Enter the remaining accept format fields.
5. Click *move* to place the appointment in the *WIP*. Click *OK* at the *appointment attributes* window.
6. Select the correct *appointment date* on the calendar.
7. *schedule* and *confirm* the appointment.

Note - there is no requirement to place the request on the request list first.

Option 2. Schedule chart only or exclusion appointment

1. Enter a *chart only* or *exclusion* appointment type (e.g. Neuro Surg Chart Only) and *location*. (If a location does not appear, the appointment type requires mapping for TTH ESM, continue with option 1).
2. Click the *person name ellipsis* button. The *person search* window will open. Enter the patient URN as per HBCIS and click on the correct patient. Click *OK*.
3. Enter the *reason for appointment*. (NB – the only mandatory fields for chart only include the appointment type, location and patient URN).
4. Click *move* to place the appointment in the *WIP*. Click *OK* at the appointment attributes window.
5. Select the correct *appointment date* on the calendar.
6. *schedule* and *confirm* the appointment.

Note - there is no requirement to place the request on the request list first.

2. Patient has an existing request

Double click on the request and check the *enc type*. Click *close*.

No encounter associated

Person Name	Enc Type	FIN Number
TESTTTHGCSKIT, KITTY		

1. Right click on the request and select *complete request*. The appointment will now appear in the *WIP*.
2. Select the correct *appointment date* on the calendar.



3. *schedule* and *confirm* the appointment.

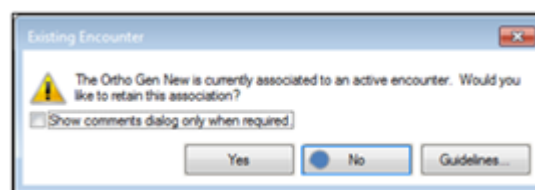
Pre-arrival encounter associated

Person Name	Enc Type	FIN Number
TESTTTHGCSKIT, KITTY	Pre-arrival	375790

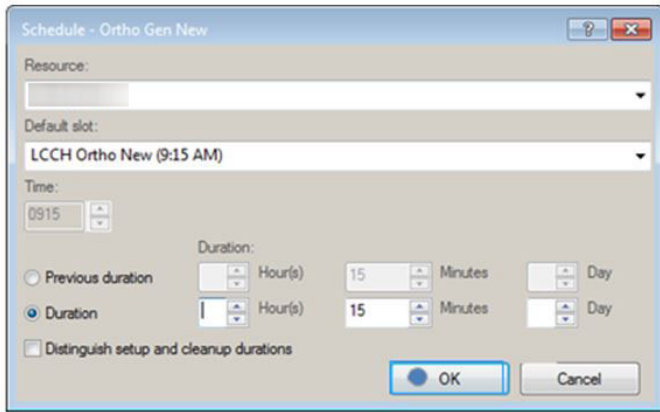
1. Right click on the request and select *complete request*. The appointment will now appear in the *WIP*.
2. Select the correct *appointment date* on the calendar.
3. *schedule* and *confirm* the appointment.

Note – you now need to disassociate the pre-arrival encounter

4. Drag the appointment back to the *WIP*. When the *existing encounter* window opens, click *no*. Click *OK* at the appointment attributes window. The appointment reappears in the *WIP*.



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



- Click *confirm*. When the *confirm* box opens, click on the *general* tab, click *set enc*.
- The encounter selection window will open. Select the correct *inpatient* encounter and click *OK*.

Check in a scheduled inpatient

Note: If an inpatient is scheduled to an outpatient appointment, the encounter must be associated to the current inpatient admission (unless booked to a chart only or exclusion appointment type).

- Locate the patient appointment and action a check in.
- At the *check in* window, check the encounter type that the appointment is associated to.

No encounter associated

Person Name	Enc Type	FIN Number
TESTTTHGCSKIT, KITTY		

- Click *OK* at the *check in* window. The *encounter selection* window will open. Select the correct *inpatient* encounter and click *OK*.

URN	Encounter Type	Patient Location
TTH 904349	Pre-arrival	TTH MEDOPD
TTH 904349	Outpatient	TTH KIRWAN 7
TTH 904349	No Visit	
TTH 904349	Inpatient	TTH WB L2 TSG1

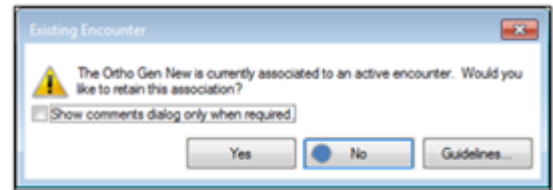
Pre-arrival encounter associated

- If a *pre-arrival* encounter is associated, click *cancel* to close the check in window.

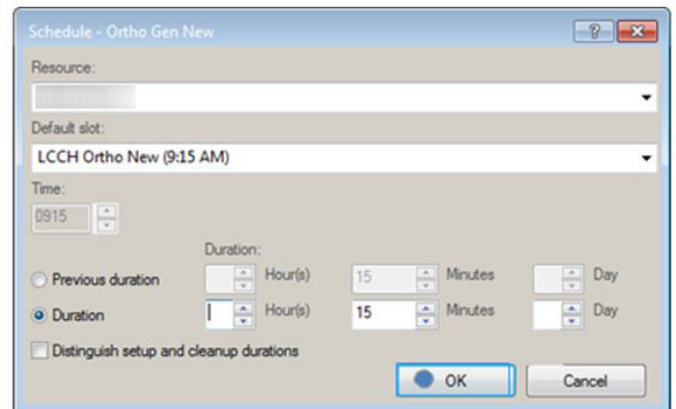
You now need to disassociate the pre-arrival encounter.

Person Name	Enc Type	FIN Number
TESTTTHGCSKIT, KITTY	Pre-arrival	375790

- Drag the appointment back to the *WIP*. When the *existing encounter* window opens, click *no*. Click *OK* at the *appointment attributes* window. The appointment reappears in the *WIP*.



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



- Click *confirm* and *OK* in the confirm window. The pre-arrival has now been disassociated.
- Locate the patient appointment again and action a check in. Continue the check in process as per above 'no encounter associated'.
- The pre-arrival that is no longer required should now be discharged. Refer to QRG ESM – Encounter Management (Discharging unused encounters).