



## ESM – Schedule a New appointment from a request list

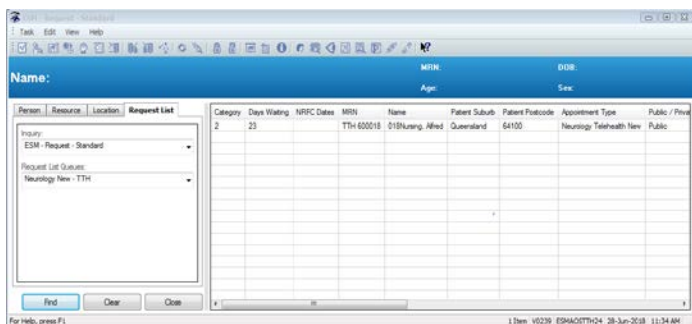


**Note:** All referrals must be added to a request list before an appointment is booked (except walk-ins for the day of appointment). Find the patient's entry on the request list to book their first appointment.

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



2. Click the *request list* tab and select *ESM – request - standard* from the *inquiry* drop-down list. Select the corresponding *request list* e.g. Neurology New – TTH.

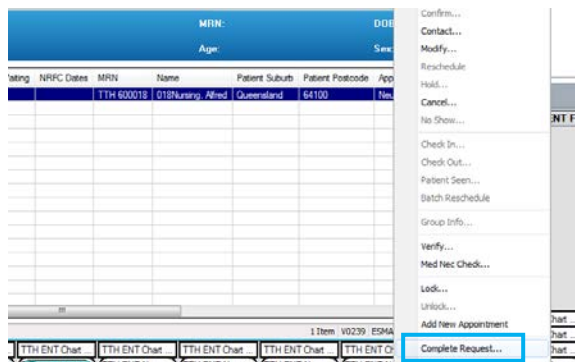


3. To ensure patients are scheduled off a *request list* in alignment with the principles of treat-in-turn and in- time, sort the lists by clicking on *days waiting twice* and the *category once*.

Days Wait	Appointment Type	Category	Ready For Care
108	Ortho Gen New	2	Y

The *request list* is now sorted by the longest waiting patient within each *category*.

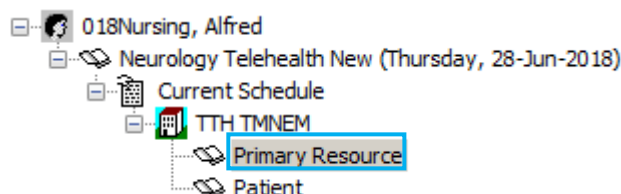
4. Locate the *patient* to schedule from the list. Right click, *Complete request*.



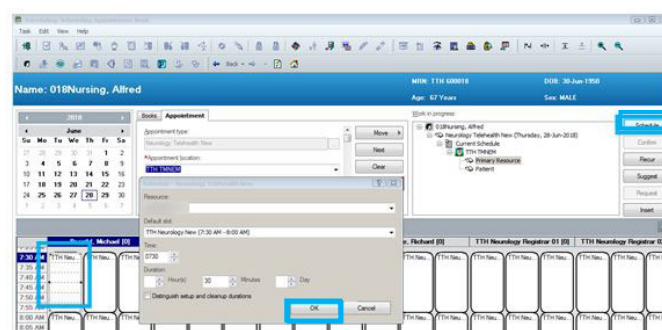
5. The *appointment attributes* window will open, click *OK*. The appointment information now displays in the *work in progress (WIP)* box.
6. Locate the corresponding *appointment date* for the appointment. The calendar will display vacant appointments for your *appointment type* by having **bold** dates.

2018						
June						
Su	Mo	Tu	We	Th	Fr	Sa
27	28	29	30	31	1	2
3	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>	<b>8</b>	9
10	<b>11</b>	<b>12</b>	<b>13</b>	<b>14</b>	<b>15</b>	16
17	<b>18</b>	<b>19</b>	<b>20</b>	<b>21</b>	<b>22</b>	23
24	<b>25</b>	<b>26</b>	<b>27</b>	<b>28</b>	<b>29</b>	30
1	2	3	4	5	6	7

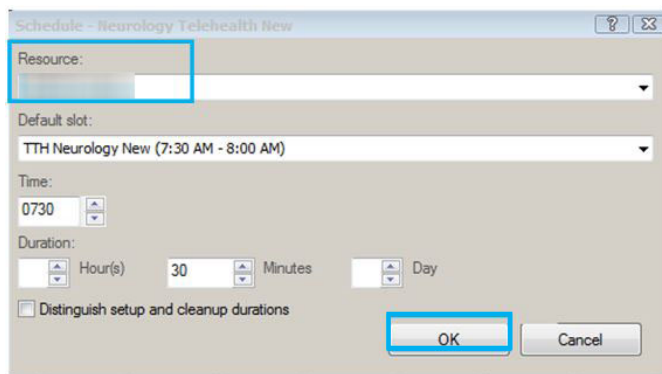
7. Make sure the *primary resource* is highlighted.



8. Schedule the appointment by selecting *the appointment* in the appointment grid and clicking *schedule, OK*.

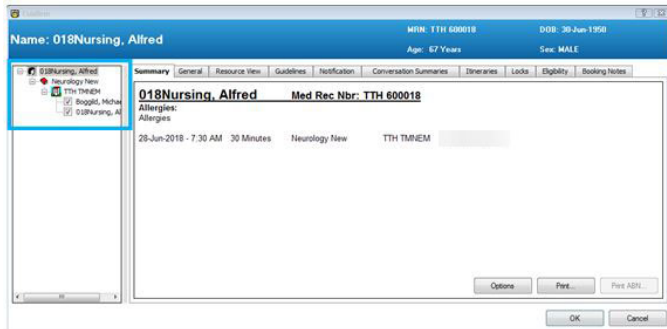


9. Ensure the correct *resource* is listed and the appointment *type* and *duration* are correct.

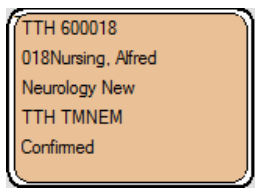


To Confirm the Appointment

10. Click *confirm* to secure the appointment. If the patient is aware of the new appointment date. **Ensure both boxes are ticked.**

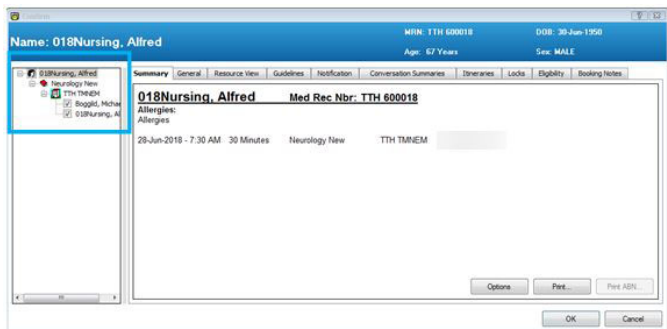


- Click the *notification* tab to print a letter. Select the *reports* menu, the corresponding *letter*, your *printer* and the right arrow. *OK*.
- The appointment is now confirmed (latte).

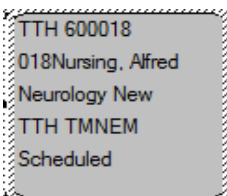


### To Schedule the Appointment

- Click *confirm* to secure the appointment. If the patient is aware of the new appointment date. **Ensure both boxes are unticked.**



- Click the *notification* tab to print a letter. Select the *reports* menu, the corresponding *letter*, your *printer* and the right arrow. *OK*
- The appointment is now *scheduled* (grey). **Note the appointment must be confirmed prior to checked-in.**



### Appointment letter considerations

If your area is supported by letter batching services, you do not need to print a letter if the appointment is more than six weeks away.

If your area is not supported by letter batching, you will always need to print this letter. You may also need to include relevant clinical information sheets.

### Appointment offer letters

Letter	When to use
OUTPT - Appt Confirm	Appointment has been scheduled. Details of the appointment are included.



**Note:** In the Confirm Box the patient and the resource boxes must be both unticked or both ticked otherwise you will get a mismatch error.

All appointments must be confirmed (latte) prior to check in

### To Confirm a Scheduled Appointment

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



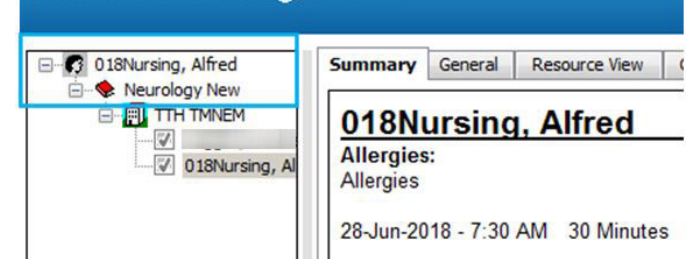
- Click the *person* tab and click the ellipsis button, enter the *patients URN* and enter. Select your patient and click *OK* and Click *find*

- Select the corresponding *appointment* showing as *scheduled* and *right click* and select *confirm*.

Appointment Date \ Time	Duration	Appointment Type	Public / Private	Appointment State	Ambulatory Location	Physical Location
28-Jun-2018 - 7:30 AM	30	Neurology New	Public	Rescheduled	TTH TMNEM	
28-Jun-2018 - 7:30 AM	30	Neurology New	Public	Scheduled		
28-Jun-2018 - 8:15 AM	20	ENT New	Public	Checked Out		
29-Jun-2018 - 11:15 AM	10	ENT Review	Public	Confirmed		
04-Jul-2018 - 8:15 AM	20	ENT New	Public	Rescheduled		

- Tick both* the patient and the resource boxes and click *OK*

### Name: 018Nursing, Alfred



- The appointment is now confirmed (latte).