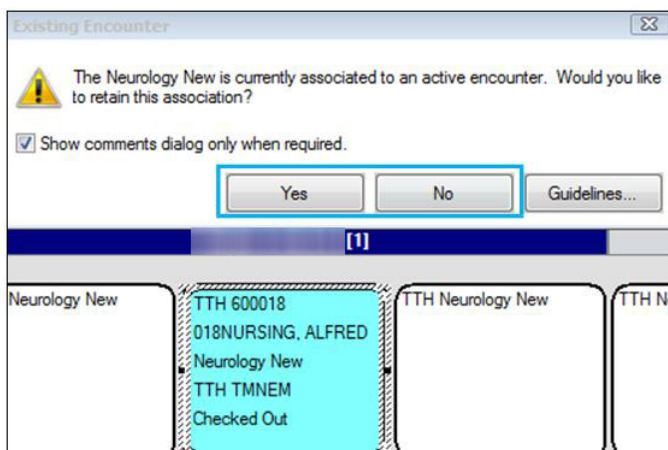




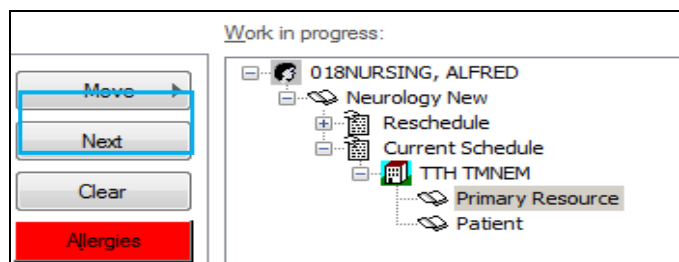
## ESM – Schedule a Review appointment

Previous ESM appointment for same sub-specialty / referred condition available

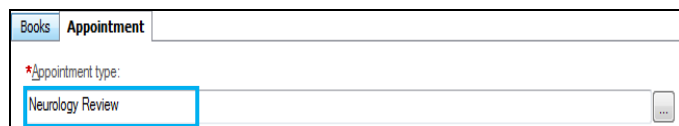
1. Locate the previous appointment, either through the *appointment grid*, or the *appointment Inquiry* button and perform a *person search*. The following processes are to be followed depending on the search.
  - From the appointment grid, drag the appointment to the WIP; or
  - From the *person inquiry* search, right click, *reschedule*.
2. An *existing encounter* window will appear.
  - For *hospital encounters*, click *no*
  - For *community encounters*, encounters should be retained until the patient has been discharged. Click *yes*.



3. Appointment attributes window will display click *OK*.
4. Click the *next* button to use this appointment as a template.



5. Over-key the previous appointment extension with *review* (if different) and click the *ellipsis* button (if search required).



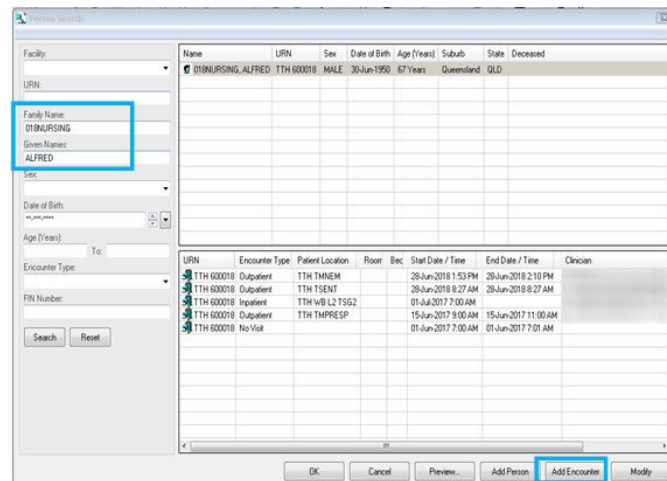
6. Review the *appointment location* box. The location should reflect where the service will be delivered (note, this often

defaults automatically but if there are multiple options the user will have to select one before proceeding).

\*Appointment location:

TTH TMNEM

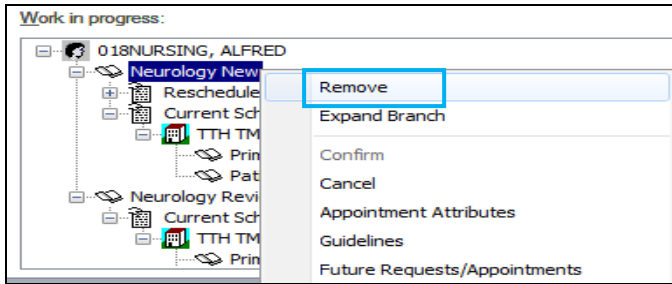
7. Click the *person name ellipsis* button. The *person search* window will open. **Although the patient name is already populated, you must still complete this step, in order to add a pre-arrival encounter.**



8. Update the *referral expiry date* field. If you are scheduling a *review* from a previous *new* appointment, the *referral expiry* date field will require manual completion. If you are scheduling this appointment from a previous *review*, this may not be required.

Length of referral	Date to apply
General Practitioner (12 months)	Today 'T' (plus) 1 Year (minus) 1 Day
Specialist to Specialist (3 months)	Today 'T' (plus) 3 Months (minus) 1 Day
Other	Today 'T' (plus) specific ref duration (minus) 1 Day
Indefinite	01-Jan-2100
Data take-up (expired)	02-Feb-2100

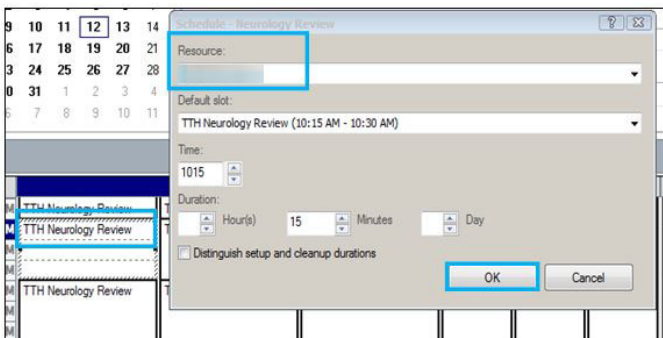
9. Enter relevant scheduling comments into the *scheduling comments* field (e.g. 28/06/18 - CH - 2/52 review as per Dr Smith). Click *move*.
10. The appointment attributes box will open click *OK*.
11. Right click on the original template appointment in the *WIP* (it should be the one with reschedule under the appointment type) click *remove*. The newly created *review appointment* will remain in the *WIP*.



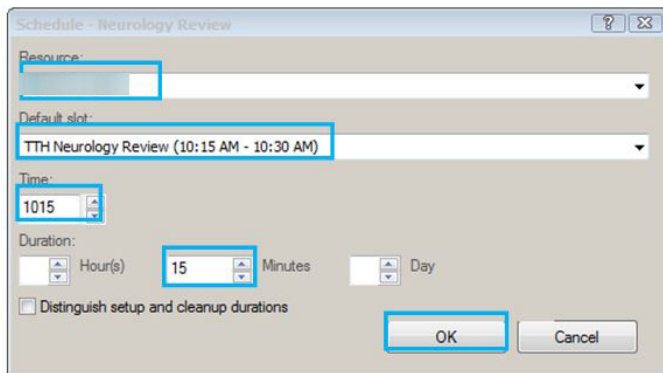
12. Locate the corresponding *appointment date* for the appointment. The *calendar* will display vacant appointments for your *appointment type* with **bold** dates.

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

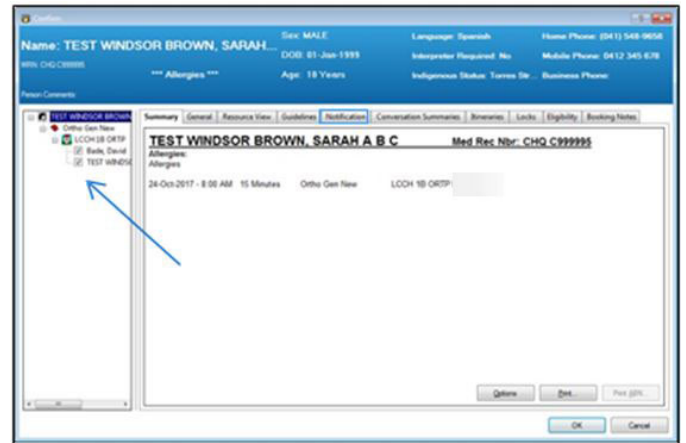
13. Schedule the *appointment* by highlighting primary resource, selecting the appointment and clicking *schedule, OK*.



14. Ensure the correct *resource* is listed and the appointment *type, time* and *duration* is correct. Click *OK*.



15. Click *confirm* to secure the appointment. If the patient is aware of the review appointment date, there is no need to untick the checkboxes.



16. Click *notification* tab to print a letter. Select the *reports* menu, the corresponding *letter*, your *printer* and the right arrow. *OK*.

*Appointment letter considerations*

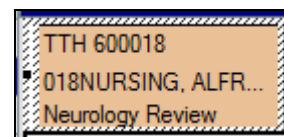
If your area is supported by letter batching services, you do not need to print a letter if the appointment is more than six weeks away.

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.

17. The appointment is now in *confirmed* (latte) status.



*If No previous ESM appointment or ESM request list entry for same sub-specialty / referred condition exists*

- Perform a search to determine whether there was a recently migrated open HBCIS referral to ESM (refer to [restoring migrated open referral information from HBCIS – QRG](#)).
  - If you locate a previously cancelled migrated HBCIS referral, schedule appointment as appropriate by following steps above.
- If no appointments or migrated referrals are located, commence entry of a new appointment by clicking on the *appointment* tab and completing the associated *accept* formats for the *appointment type*.



- For an operation, select the post op *appointment type* for the specialty (if it exists).
- Create a *pre-arrival* encounter by clicking on the *ellipsis* button and selecting the *patient, add encounter*.
- *Primary resource* can be selected if the patient must see a specific resource.
- Length of referral updated to *specialist to specialist (3 months)* and referral expiry date to *02-Feb-2100* as the referral has not been activated yet. (Reception staff will change this on patient check-out).

- *Referring clinician* is the referring doctor, with the ward listed on the following Lines
  - (1) Address Line 1 – *Townsville Hospital*
  - (2) Address Line 2 – *Department of referring clinician*
  - (3) Suburb – *Douglas*
  - (4) Postcode - *4814*

3. *Scheduling comments* for the corresponding patient (e.g. 30/09/17 - 4 to 6 weeks as per ward PDA – BR).

4. Click *move* and click *ok* when the appointment attributes window opens.
5. Schedule the appointment and contact the family (either by telephone, or include a letter under the *notifications* tab).