



**Electronic Document and Records
Management System (EDRM)**

**Appointments Module
User Guide**

CCube Solutions | 13 Diamond Court | Opal Drive | Milton Keynes | MK15 0DU Main Office: +44
(0)1908 677752 | Fax: +44 (0)1908 679444 | Web: www.ccubesolutions.com

CCube Solutions is a trading name of OITUK Limited

1 Contents

1	Contents.....	2
2	Revisions and Distribution	2
3	Introduction	3
4	Appointments View	3
4.1	Appointments Overview	3
4.2	Appointments Display.....	4
4.3	Drop Down List Filtering.....	5
4.4	Patient Appointment Options.....	9

2 Revisions and Distribution

Revisions

Revision	Summary of Changes	Author	Date
1	Initial creation of document	Chris Rothwell	26/05/2015
..	Various	Various	Various
11	Content optimised for MKUH	Andrew Phelps	24/02/2019

3 Introduction

The EDRM System Appointments Module provides a list of out-patients that have clinic appointments. The patient list can be filtered according to various criteria.

4 Appointments View

4.1 Appointments Overview



Clinic appointments can be viewed by clicking on this icon in the left sidebar menu. The list will default to the current date.

Time	Hospital Number	Name	Type	Speciality	Clinician	Clinic	Icon
13:45	1591366X	Grey James	Referral	Cardiology	Paul Smith	Dermatology	☆

Appointment filters:

- Appointment Date: 11/04/2018
- AM/PM: Both
- Speciality: Cardiology
- Clinician: Paul Smith
- Clinic: Dermatology

The data displayed within the drop down lists is driven by the specialty group the logged in user belongs to.

When using the appointments view the page features will appear as follows;

- Default to current date
- Display the selected default value for the clinician drop down list
- Display the selected default value for the specialty drop down list
- Display the selected default value for the clinic being held for the selected specialty
- Display all of the appointments for that day, that clinician, that specialty, that clinic in a time ascending order.
- Patient information is displayed within 8 columns underneath the drop-down lists showing the time of the appointment, the hospital number of the patient, the name of the patient, the visit type, the Speciality, Clinician associated with the appointment, the Clinic and an icon column providing both extra features and additional information

4.1.1 Icons Column

The icons column allows for both additional functionality as well as additional patient information



In order of the icons appear in the above example:



Add patient to the 'Briefcase', if the logged in user has permission to view the Briefcase module



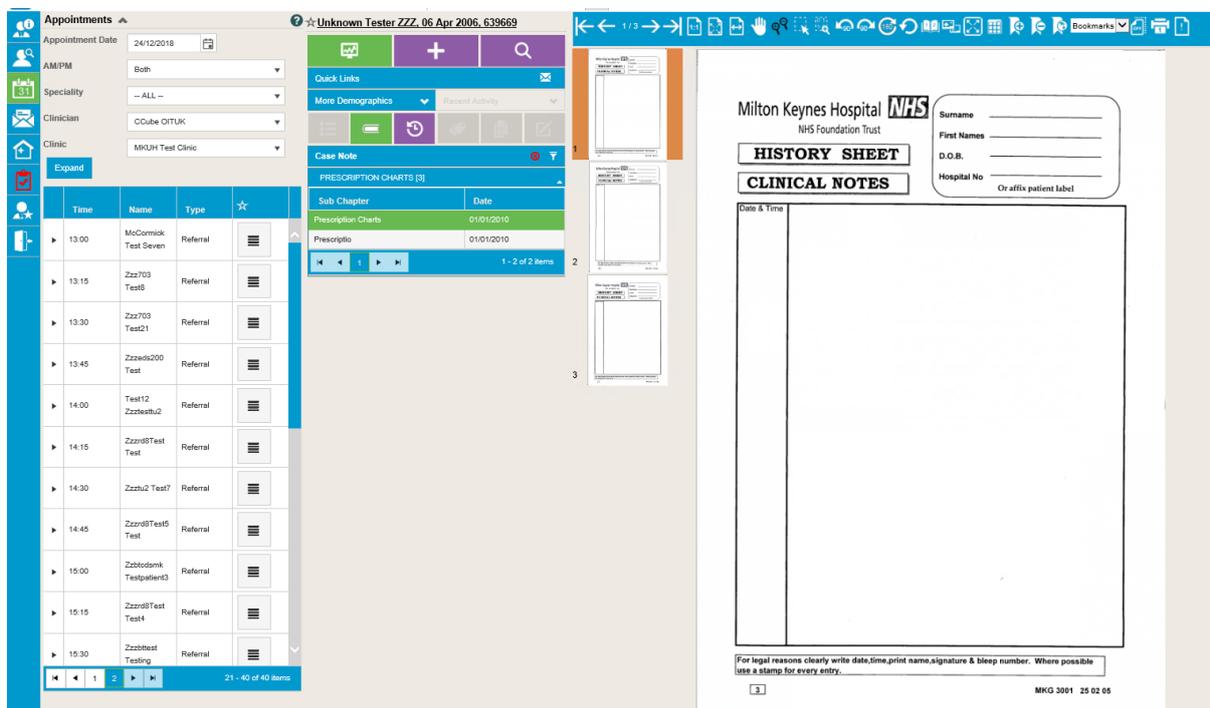
Add patient as a favourite if the logged in user has permission to view the My Patients module



Patient has Alerts – Click the icon will display all Alerts in a modal. Dependant if the permission has been enabled

4.2 Appointments Display

The appointment list will continue to show in the left hand column, the middle column will show the patient's health record and the right hand panel will show the viewer.



The screenshot displays the EDRM System Appointments Module interface. The left panel shows a list of appointments for a patient named 'Unknown Tester ZZZ, 06 Apr 2006, 639669'. The middle panel shows patient details and a 'PRESCRIPTION CHARTS (2)' section. The right panel shows a 'Milton Keynes Hospital NHS' form with fields for 'HISTORY SHEET' and 'CLINICAL NOTES'.

Time	Name	Type	Star
13:00	McCormick Test Seven	Referral	Star
13:15	Zzz703 Test8	Referral	Star
13:30	Zzz703 Test21	Referral	Star
13:45	Zzzed200 Test	Referral	Star
14:00	Test12 Zzztestu2	Referral	Star
14:15	Zzzr8Test Test	Referral	Star
14:30	Zzzu2 Test7	Referral	Star
14:45	Zzzr8Test5 Test	Referral	Star
15:00	Zzzodank Testpatient3	Referral	Star
15:15	Zzzr8Test Test4	Referral	Star
15:30	Zzzbtest Test9	Referral	Star

The right panel shows a form for 'Milton Keynes Hospital NHS' with fields for 'Surname', 'First Names', 'D.O.B.', and 'Hospital No'. Below these fields are sections for 'HISTORY SHEET' and 'CLINICAL NOTES'. At the bottom, there is a footer with the text 'For legal reasons clearly write date,time,print name,signature & bleep number. Where possible use a stamp for every entry.' and 'MKG 3001 25 02 05'.

4.3 Drop Down List Filtering

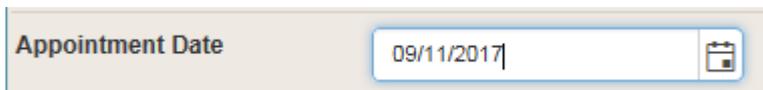
The drop down lists at the top of the page can be used to refine the list of patients.

Changing the date and time value will display only patients having appointments at that date and time. Changing the filters for clinician, speciality and clinic will display patient lists that have the selected values.

4.3.1 Date Picker\Calendar

The appointment date filter can be used in two ways;

1. Type in a new date – This must use the format DD/MM/YYYY.

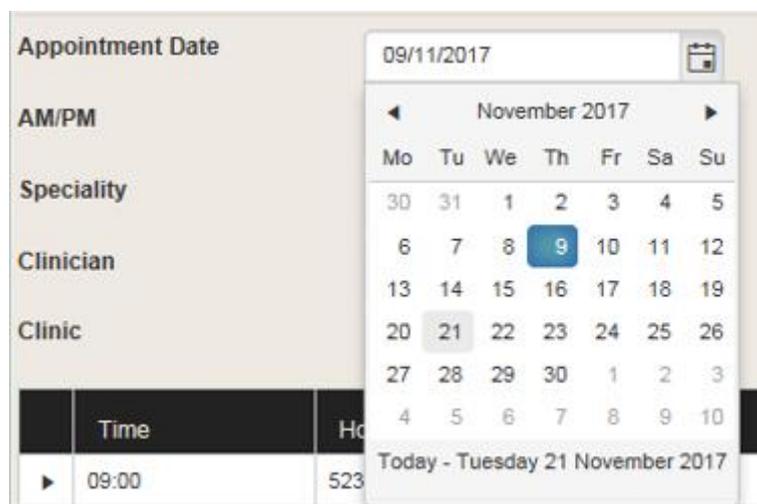


Appointment Date 

If a date is entered in a different format the appointments list will not be displayed and a red box will appear around the display date indicating an error with the value entered.

2. Select a different appointment date from within the calendar picklist.

Clicking on the calendar icon, will display a list of days within the currently selected month.



Appointment Date 

AM/PM

Speciality

Clinician

Clinic

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

Today - Tuesday 21 November 2017

Time: 09:00

Ho: 523

To select an appointment select the calendar icon on the left hand side. The year, month and day can be adjusted as required.

3. A list of months can be displayed by the month name at the top of the calendar.

Appointments

Appointment Date: 09/11/2017

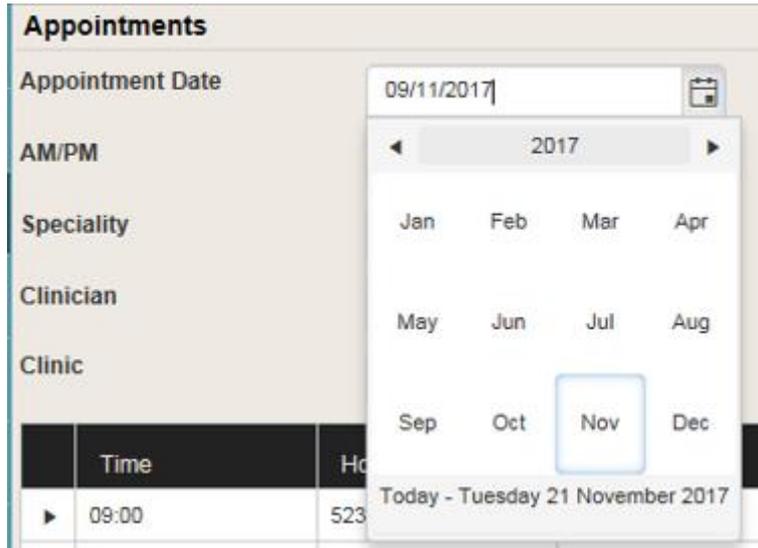
AM/PM

Speciality

Clinician

Clinic

Time	Ho
▶ 09:00	523



4. A list of years can be displayed by clicking the year number at the top of the calendar.

Appointments

Appointment Date: 09/11/2017

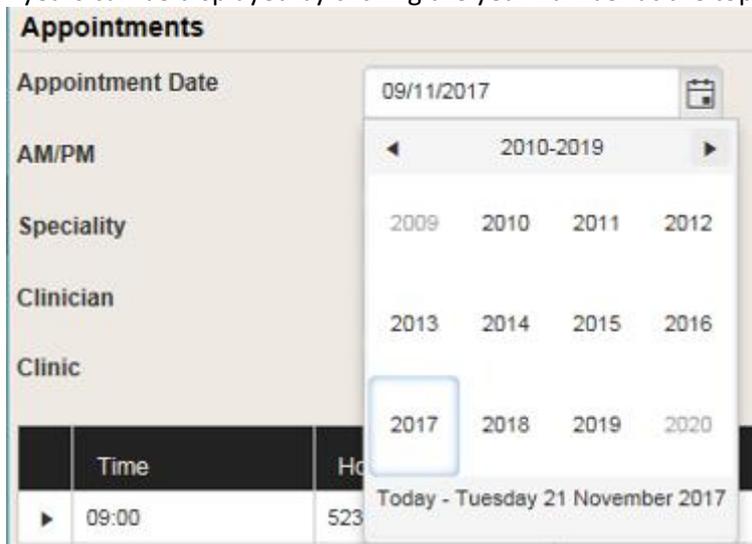
AM/PM

Speciality

Clinician

Clinic

Time	Ho
▶ 09:00	523



The left and right arrows can be used to browse forward and backward within the calendar.

4.3.2 AM/PM

The AM/PM filter provides three values (BOTH, AM, PM). This allows the user to filter the display of patients based upon the value selected. By default it should display the time range of the system i.e. Morning will display AM, Afternoon will display PM.

Changing the value to BOTH should display all information held against both AM and PM.

Appointments

Appointment Date 

AM/PM ▼

Speciality ▼

Clinician ▼

Clinic ▼

4.3.3 Speciality

The filter will contain a list of specialities that are assigned to the logged in user.

Appointments

Appointment Date 

AM/PM ▼

Speciality ▼

Clinician ▼

Clinic ▼

Time	Hospital Number	Name
------	-----------------	------

4.3.4 Clinician

The filter will contain a list of clinicians that may be associated to the logged in user. Where the speciality filter has been clicked, the clinician filter will only contain clinicians that have the selected speciality.

Appointments

Appointment Date: 09/11/2017

AM/PM: Both

Speciality: -- ALL --

Clinician: Charles Bucket

Clinic: -- ALL --

Time	HC
09:00	523

Typically the clinician name will appear as forename and surname.

4.3.5 Clinic

The list of clinics in this filter will be determined by the speciality and clinician previously selected.

There may be multiple clinics held against one single speciality.

Appointments

Appointment Date: 09/11/2017

AM/PM: Both

Speciality: -- ALL --

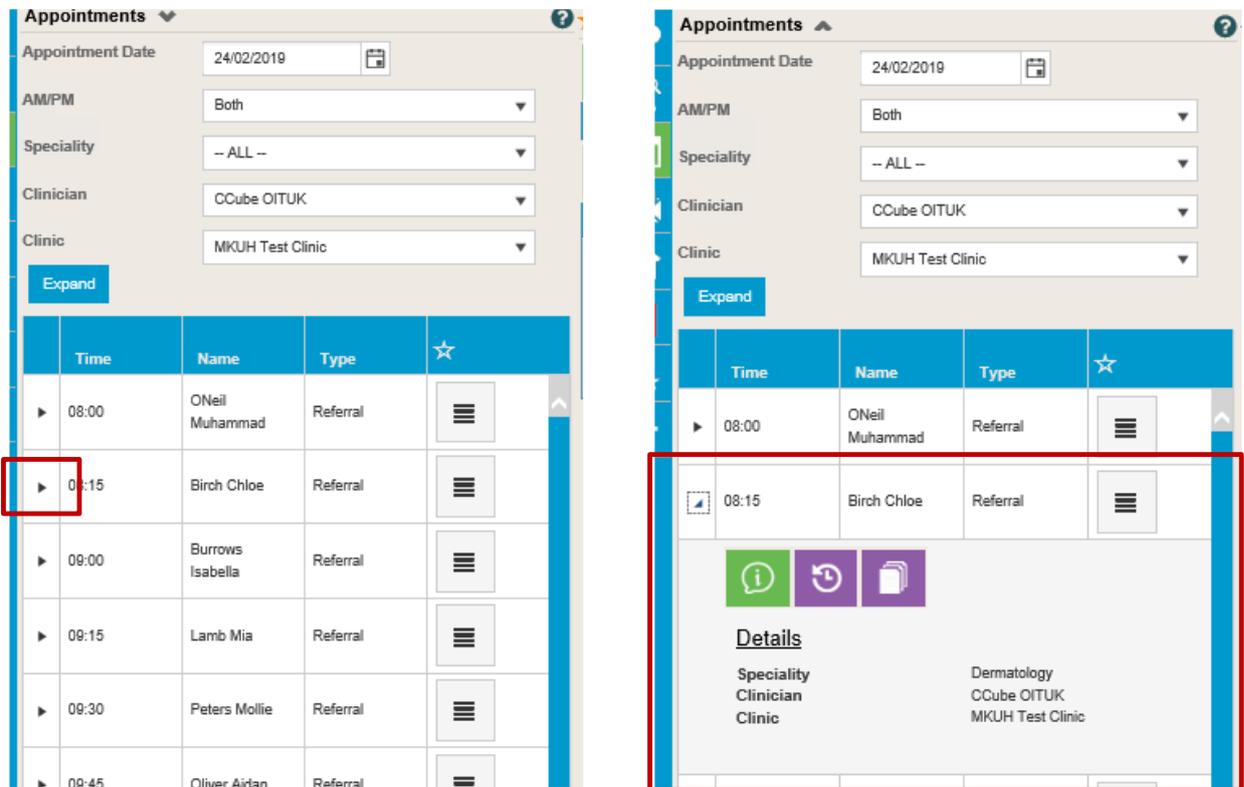
Clinician: -- ALL --

Clinic: Dermatology

Time	HC
09:00	5237541F

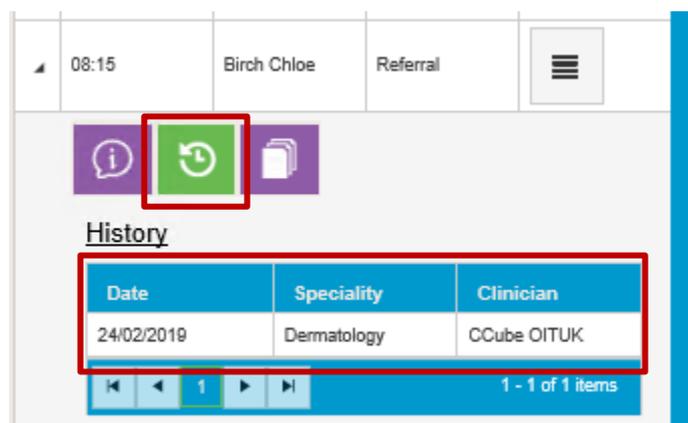
4.4 Patient Appointment Options

A given row in the patient list can be expanded to show additional details. The availability of these options has been enabled or disabled by a system administrator.



4.4.1 Appointment History

When the patient row has been expanded, click the “View History” option to see previous appointments for that patient;



Appointments will be displayed in reverse chronological order, and where there are multiple pages of appointments to be displayed the pages can be browsed via the paging controls at the bottom of the appointments list.

4.4.2 Letters

Where a user has the feature enabled a list will be displayed of letters created for that patient.

