Electronic Document and Records

Management System (EDRM)

Appointments Module

User Guide

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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.

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 you the viewer.

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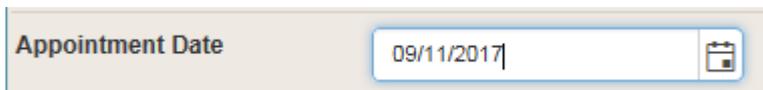
If a date is entered in a different format the appointments list will not be displayed and a red box will appear around the display date indicating an error with the value entered.

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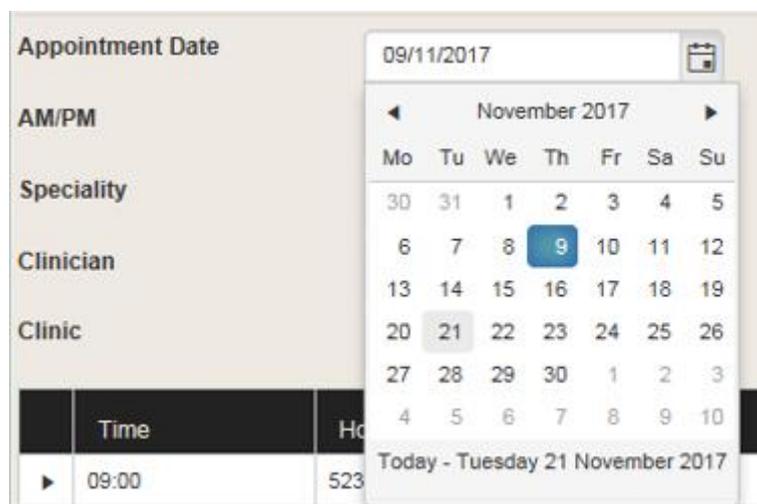
To select an appointment select the calendar icon on the left hand side.
The year, month and day can be adjusted as required.

3. A list of months can be displayed by the month name at the top of the calendar.
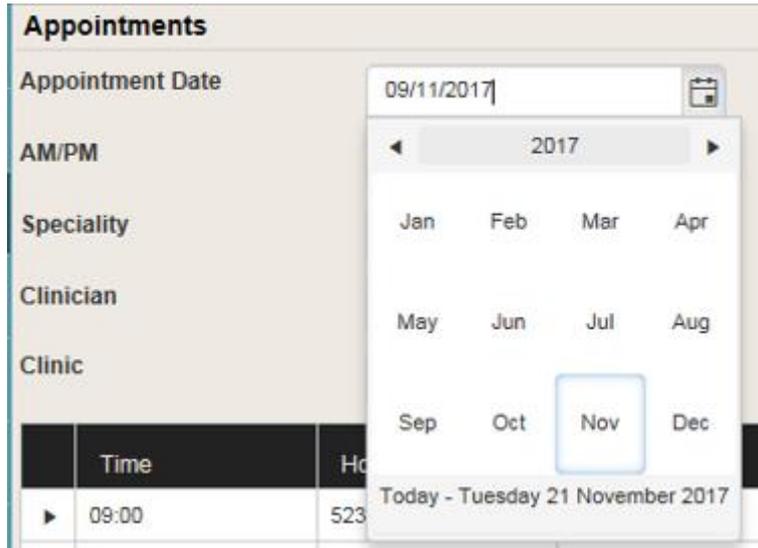
4. A list of years can be displayed by clicking the year number at the top of the calendar.
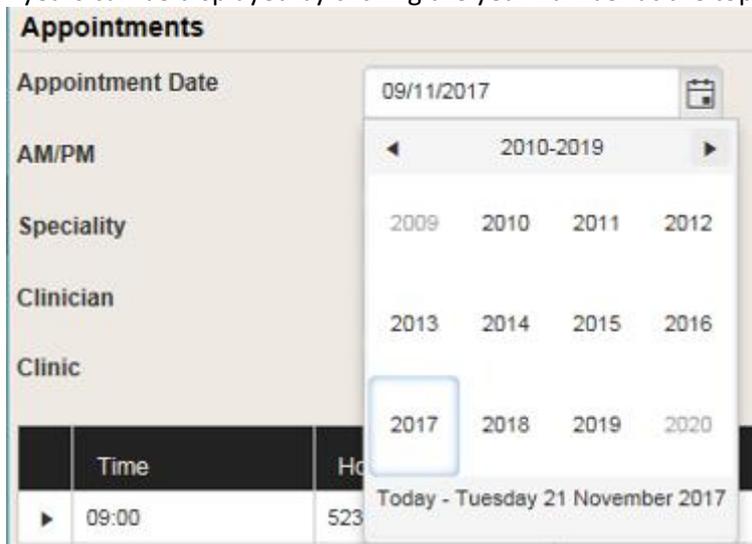
The left and right arrows can be used to browse forward and backward within the calendar.

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.

4.3.3 Speciality

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

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.

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 specialty.

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.
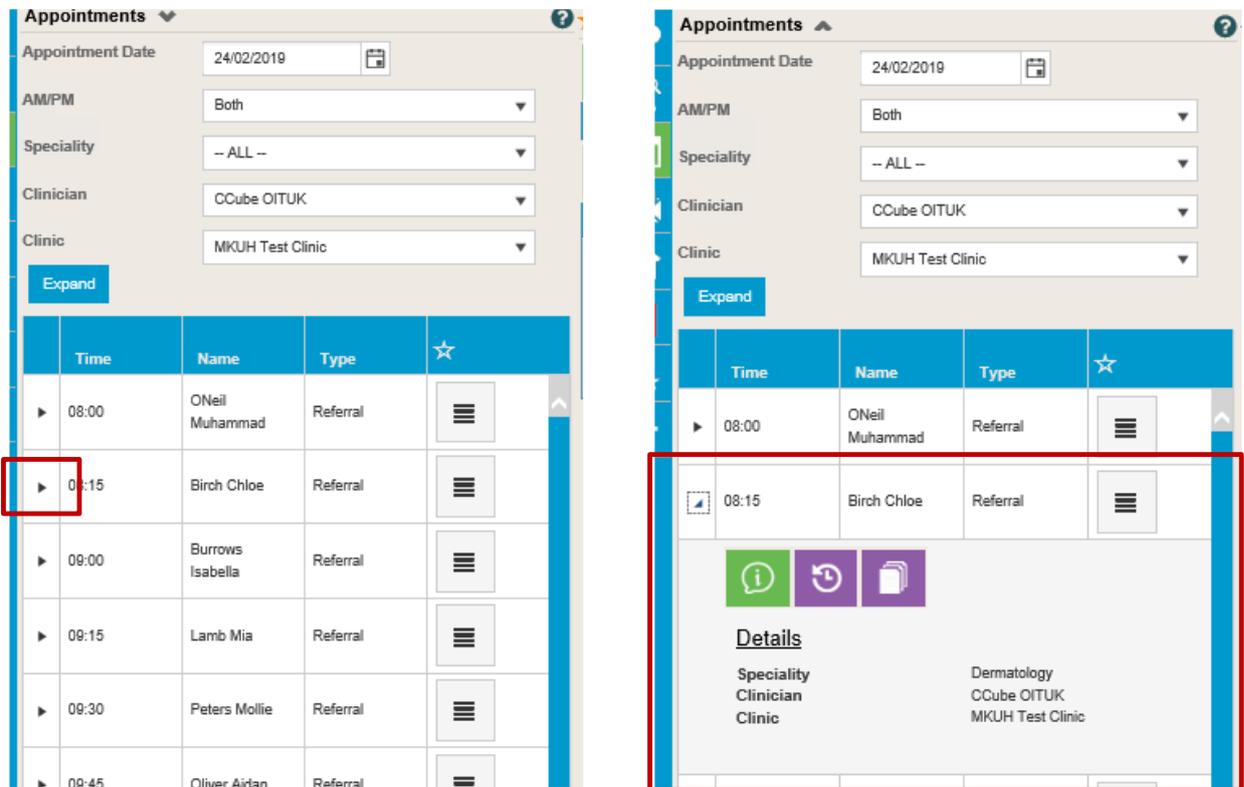
4.4.1 Appointment History

When the patient row has been expanded, click the "View History" option to see previous appointments for that patient;
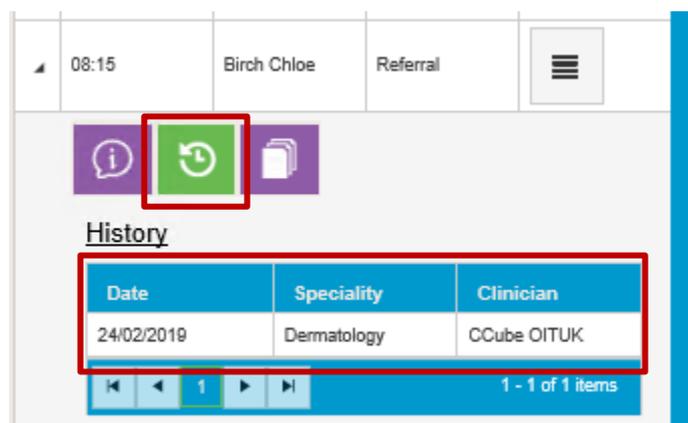
Appointments will be displayed in reverse chronological order, and where there are multiple pages of appointments to be displayed the pages can be browsed via the paging controls at the bottom of the appointments list.

4.4.2 Letters

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