



## Action a check in

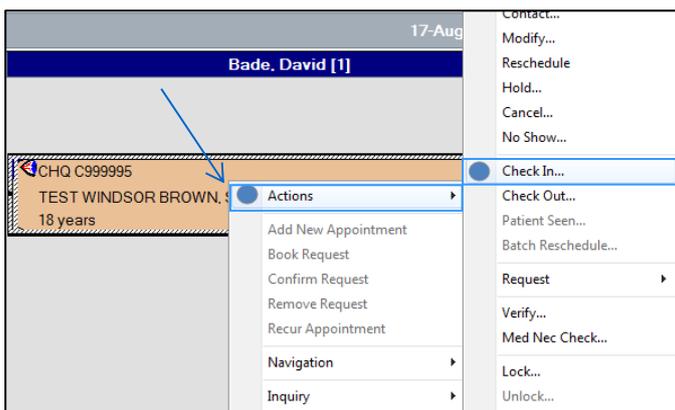
**Note:** Before performing any action in ESM, patient demographic details must be checked and updated in the HBCIS Patient Registration screen. The HBCIS screen must be filed off to ensure ESM is updated with the current patient details.

There are two ways to check patients in for their appointment in ESM, depending on your role within the department:

- directly through the [appointment grid](#) or
- through the [person inquiry](#) search.

### Appointment grid check-in

1. Locate the appointment in the relevant [book](#). Right click on the Appointment, select [actions](#), [check in](#).



### Person inquiry search check-in

1. Locate the patient through the [ESM person search](#) and selecting [start date](#) as today (t). Right click the appointment and click [check in](#).

Appointment Date \ Time	Appointment Type	Ambulatory Location	Appointment State	Hold...
17-Aug-2017 - 10:30 AM	Ortho Gen New	LCCH 1B ORTP	Rescheduled	Cancel...
17-Aug-2017 - 10:30 AM	Ortho Gen New	LCCH 1B ORTP	Rescheduled	No Show...
17-Aug-2017 - 10:30 AM	Ortho Gen New	LCCH 1B ORTP	Rescheduled	
17-Aug-2017 - 10:30 AM	Ortho Gen New	LCCH 1B ORTP	Confirmed	Check In...
				Check Out...
				Patient Seen...
				Batch Reschedule

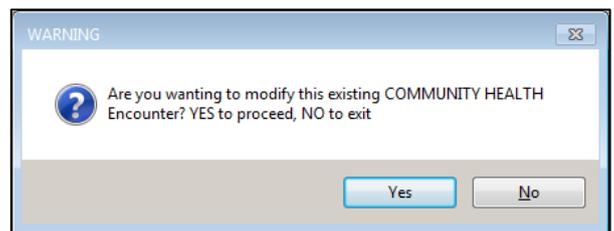
2. Review tabs on the [check in window](#) and modify details as required. Please note, if you are checking in a retrospective appointment the date and time of appointment should be backdated. Click [OK](#).

- An encounter should already be set for the appointment.
  - If no encounter is set, the system will prompt the user to create one after pressing [OK](#).
  - The appointment time ([date](#) and [time](#) fields) can be modified by clicking in the field or using the up and down arrows.
3. Select the correct encounter from the [available conversations](#) window.

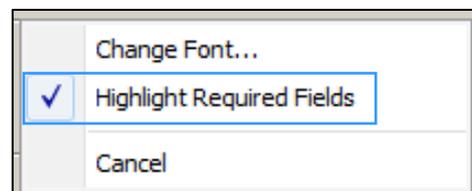


### Option 1: community encounters

1. Select [community registration](#), [OK](#).
2. Modify this existing [community health](#) encounter, [yes](#).

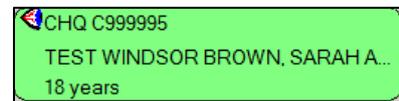


3. In the [modify encounter, ESM check in](#) window, ensure all mandatory fields (fields shaded in yellow) are completed.
4. If there are no yellow fields showing, right click in the grey area and select [highlight required fields](#). Update fields, [OK](#).





- The patient/client appointment is now **checked in** and appears green in the **appointment grid**.



**Option 2: pre-arrival/hospital encounters**

- Select **modify encounter details – ESM check in**, **OK**.
- For pre-arrival encounters, a **change to outpatient** box will open asking if you want to modify the encounter. Select **yes**.

- In the **modify encounter, ESM check in** window, ensure all mandatory fields (fields shaded in yellow) are completed.
- If there are no yellow fields showing, right click in the grey area and select **highlight required fields**. Update fields, **OK**.

**Actioning a check out**

**Appointment grid check out**

- Locate the appointment in the relevant **book**. Right click on the **appointment**, select **actions**, **check in**.

**Person inquiry search check-out**

- Locate the patient through the **ESM person search** and selecting **start date** as today (t). Right click the appointment and click **check out**.

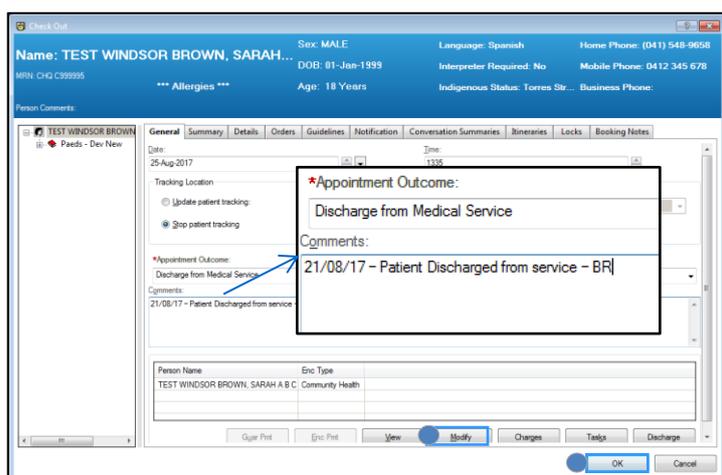
Appointment Date \ Time	Appointment Type	Ambulatory Location	Appointment State	Hold...
14-Aug-2017 - 8:15 AM	Paeds - Dev New	LCCCH 6D CDS	Rescheduled	Cancel...
14-Aug-2017 - 8:15 AM	Paeds - Dev New	LCCCH 6D CDS	Rescheduled	No Show...
14-Aug-2017 - 8:15 AM	Paeds - Dev New	LCCCH 6D CDS	Checked In	Undo Check In
14-Aug-2017 - 9:30 AM	Paeds - Dev New	LCCCH 6D CDS	Rescheduled	Check Out...
14-Aug-2017 - 11:15 AM	Paeds - Dev New	LCCCH 6D CDS	Rescheduled	Patient Seen...
15-Aug-2017 - 7:30 AM	ENT New	LCCCH 3A OHNS	Cancelled	Batch Reschedule...
17-Aug-2017 - 10:30 AM	Ortho Gen New	LCCCH 1B ORTP	Rescheduled	Request
17-Aug-2017 - 10:30 AM	Ortho Gen New	LCCCH 1B ORTP	Rescheduled	

- On the **check out** window, complete the **appointment outcome** field, ensuring an **action comment** is also

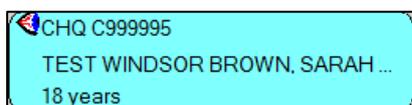


recorded (e.g. 21/08/17 – Patient Discharged from service – BR)

- The appointment time (**date** and **time** fields) can be modified by clicking in the field or using the up and down arrows.
- For **community encounters**, if the patient is being discharged, the **discharge** button must also be selected prior to pressing **OK**.



3. If the chargeable status of the client needs updating from public/Medicare (e.g. if the patient is being bulk billed or if the patient is **Medicare ineligible**), the encounter must be updated. If so, click modify. To update **payment class**, update **chargeable status** and **payment class**. Click **OK**.
4. The patient/client's appointment is now **checked out** and appears teal in the **appointment grid**.



5. Ensure the follow-up is completed for the patient as per the direction of the clinician, or hospital clinic slip.

### Check Out follow-up actions

#### Referred on

1. An OUTPT – Discharge from service **letter** is printed and provided to the patient and sent to the referring doctor by mail.

2. A referral for another internal service has been written by the clinician and either:
  - forwarded to CRU for registration and entry
  - entered into the ESM accept formats, added to the appropriate request list and forwarded to Health Information Services for scanning into the ieMR. Please note, An email notification may be required if forwarding to another department with this method.

#### Discharge from medical service

1. An **OUTPT – discharge from service letter** is printed and provided to the patient (and referring doctor by mail).
2. The **discharge** encounter button will only appear, and must be selected for, **community health** encounters. If a patient is to be discharged from a hospital appointment, the encounter will automatically discharge between 48-72 hours after the appointment.

#### Follow-up appointment required

1. **Schedule** a review appointment via the **next/move** function after a discussion with the patient/family (as per the direction of the treating clinician). This information is displayed on the clinic slip.
2. If the appointment is within the next six weeks, the patient can be provided with a copy of the letter (**OUTPT – apt offer**, or **OUTPT – apt confirm**) depending on clinic requirements. If the appointment is outside of the next 6 weeks, the patient should be advised that a letter will be sent to confirm the appointment (exceptions apply).

#### Referred for elective surgery

- The **elective surgery admission form** should be forwarded to the Elective Bookings department.
- **Please note:** a message is not automatically sent to the Elective Bookings Department and the patient is not automatically placed on an elective surgery waitlist.

