

# Scheduling and Referrals – Clinician's Leave & Appointment Slots



## This Quick Reference Guide will explain how to:

- Add, remove and block appointment slots in Scheduling Appointment
- Book and add Slot and Resource comments

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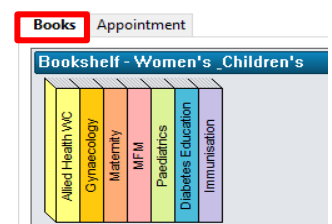
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## Adding an appointment slot

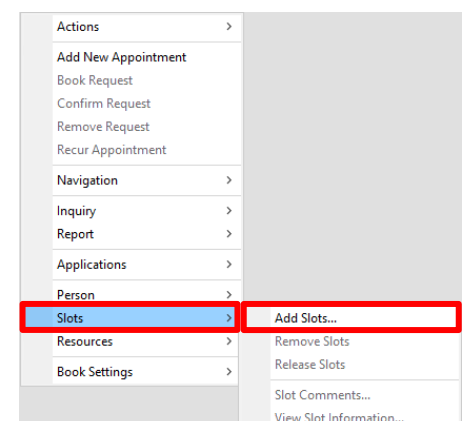
1. Open **Scheduling Appointment Book**
2. Select the date of appointment, on the **Calendar**



3. Click on **Books** tab and open required specialty within the **Bookshelf**

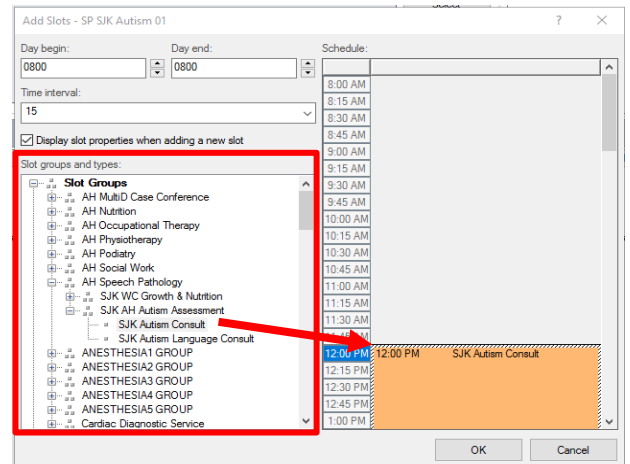


4. Right click under Resource > Select **Slots** > Select **Add Slots...**



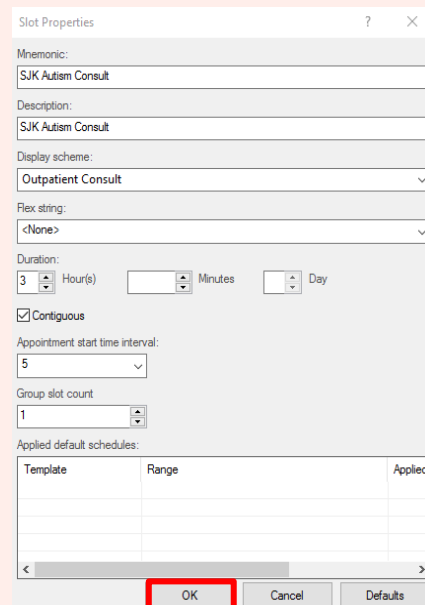
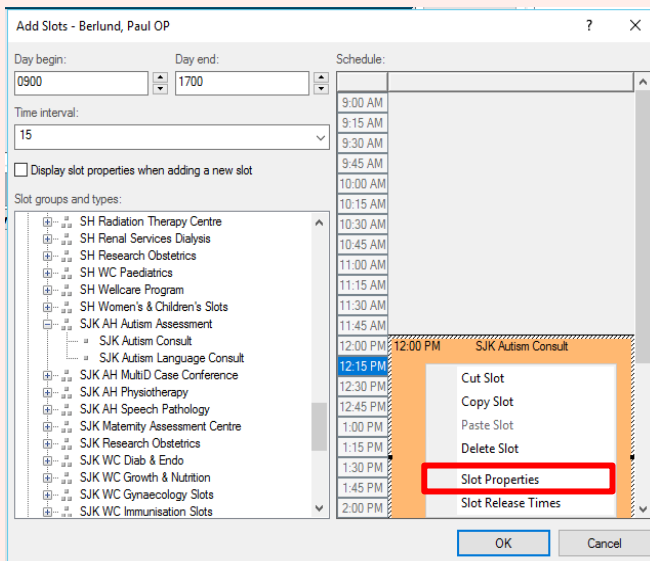


5. **Add Slots** window appears. Expand **Slot groups and types**. Find required appointment slot and drag and drop to correct time in **Schedule** box.

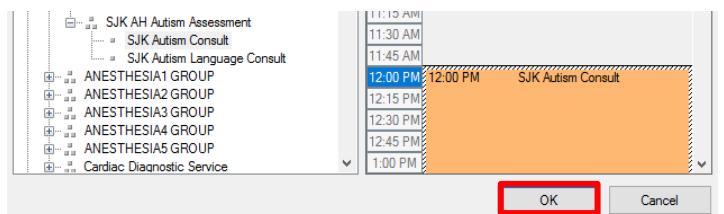


**Handy Hint**

If you need to amend appointment attributes such as **Display scheme** or **Duration**, right click and select **Slot Properties**. This will bring up dialog box. Select **OK/Cancel** to exit.

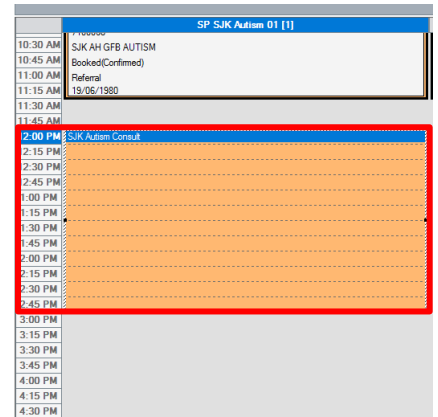


6. Select **OK** again





7. Custom slot has now been created



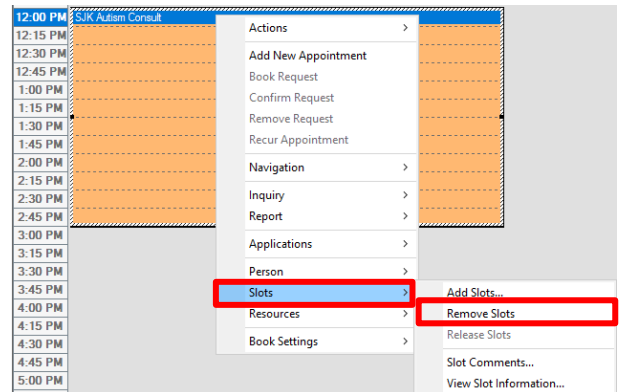
**Handy Hint**

To add comments to the slot, refer to the section below **Adding Comments to Slot**

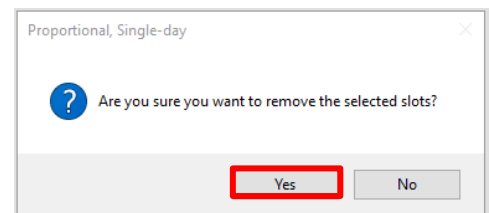
**Removing an appointment slot**

1. Follow Steps 1-3 as above under *Adding an appointment slot*

2. Right click the Appointment to be removed > Select **Slots** > Select **Remove Slots**



3. Select **Yes**



4. Slot is now removed



**Handy Hint**

You cannot add comments to a removed appointment. To add a comment to the resource, refer to the section below **Adding Comments to Resource**.



**Handy Hint**

If an appointment is already booked into a slot, reschedule the appointment before removing the slot. If this cannot be done, the scheduled appointment in the removed slot will appear on the ‘**Displaced Request List**’.



## Blocking an appointment slot

1. Follow Steps 1-2 as above under **Adding an appointment slot**
2. In the **Appointment** tab, select **Appointment type: Unavailable** and complete all mandatory fields and click **Move**

3. Drag and drop **Resource** in **Work in progress** window to the resource required to be blocked.

4. In **Schedule – Unavailable** dialog box, select **Resource, Time and Duration** to block > Click **OK**

5. In **Work in progress** window, click **Confirm**

6. Select **OK** in **Confirm** dialog box

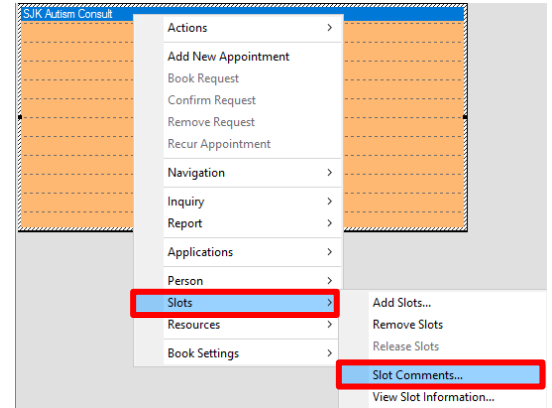


7. Slot is now blocked

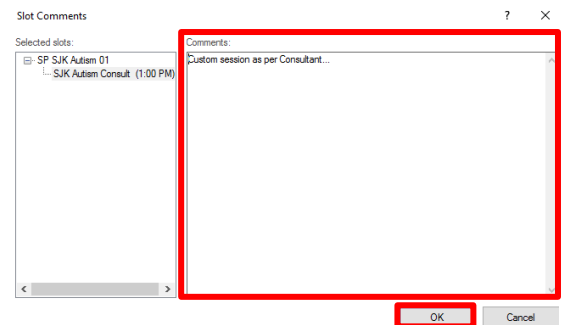


### Adding Comments to a Slot

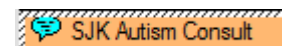
1. Right click the Appointment to add comments > Select **Slots** > Select **Slot Comments...**



2. Add **Comments** > Click **OK**

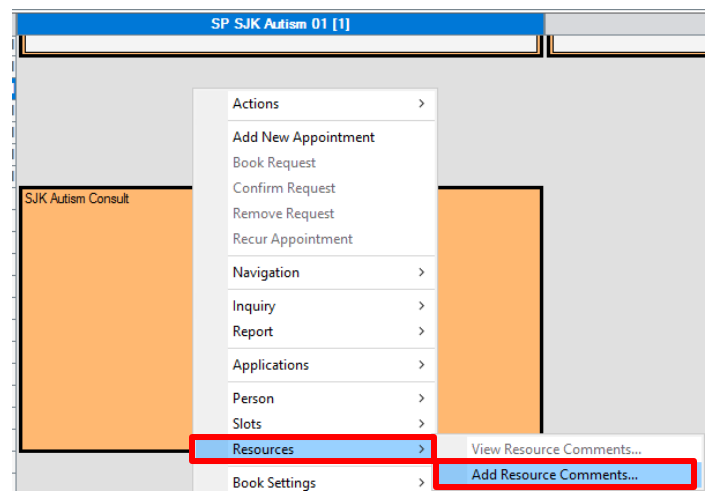


3. Comment is successfully added when blue speech bubble appears in slot




### Adding Comments to a Resource

1. Right click the Resource to add comments > Select **Resources** > Select **Add Resource Comments...**





2. Below screen will pop up. Complete **Application Range** and then
  - a) Enter **Comment description**
  - b) Select **Resource Comment template**
  - c) Click  to add template
  - d) Update **Resource comment**
  - e) Click **Add**
  - f) Once all comments added, click **Apply**
  - g) Click **Close**

3. Comment is successfully added when blue speech bubble appears next to resource name.

To view comment, click blue bubble.



## Displaced Request List

A patient will appear on a **Displaced Request List** when the slot they were booked into was removed. Users can reschedule the appointment from the **Displaced Request List**.



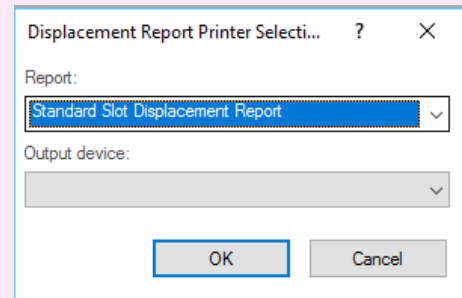
### Important

If a patient is booked into a slot that was removed, the patient will remain on the Scheduling grid until rescheduled.

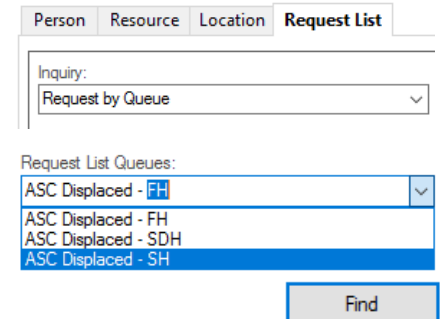


### Important

When the users remove slots with appointments booked, the below window will appear, select **Cancel**



1. In **Scheduling Appointment Book**
2. Open **Appointment Inquiry**
3. In the **Request List** tab > **Inquiry: Request by Queue**



4. In **Request List Queues** > Select **Displaced**
5. Then click **Find**

6. The displaced list loads with patients that need to be rescheduled

C	OC	Iso	Stat	Inp	Action	Person Name	Appointment Type	Earliest Date	Time	Orders	Timeframe	Scheduled Date	Isolation	Priority	Po
					Reschedule	TESTPAS, GREG	Orthopaedic New					16/06/2023 - 9:30 AM			

7. Highlight the patient > right click and select **Reschedule**

Action	Person Name	Appointment Type	Earliest Date	Time
Reschedule	TESTPAS, GREG	Orthopaedic New		

Confirm...

Contact...

Modify...

**Reschedule**

8. Refer to QRG **Scheduling and Referrals: Scheduling Actions** to reschedule the appointment