Magentus

Core Cris - Appointments

Waiting List Management & Appointments Scheduling

Magentus

Table of Contents

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Magentus | Commercial in confidence. Once Printed Uncontrolled. Page 3 of 27

Introduction

Purpose

The Core Cris - Appointments module is used to manage the **Waiting Lists** worklist ahead of undertaking the scheduling of appointments. The Cris application can accommodate the use of either a full booking system (i.e. making appointments to send to patients by post, SMS, or email) or via a partial/direct booking system (i.e. making appointments direct with patients by telephone).

Audience

This document has been designed to inform users of the intended purpose and use of the Core Cris Appointments module for use in the Cris Live, Testing or Training environments.

This document also covers how to change patients' appointments within reasonableness criteria (i.e. reasonable appointments equals two separate dates and three weeks' notice with no waiting time clock resets) and outside of this period (i.e. resetting the waiting time clock), in addition to cancelling appointments and vetting DNAs.

Glossary of terms

Term	Description
Full Booking	Normal booking process, where the patient is booked into the next available clinic slot within the relevant time scale and an appointment letter is sent by post, SMS, or email.
Partial Booking	When a patient is given a target date, prior to being placed on a waiting list and when appropriate, the patient is asked to contact the hospital and choose a time that suits them. This typically involves a booking centre approach.
Direct Booking	Like the Partial Booking system except the hospital will typically make at least two attempts to telephone the patient to book an appointment, before sending out the next available appointment to the patient by post.
Diagnostic Waiting Times (DWT)	The measuring of waits, and monitoring of activity for 15 key diagnostic tests including clock starts, resets, and stops. This report is submitted monthly.
Diagnostic Imaging Dataset (DID)	The central collection of detailed information about diagnostic imaging tests carried out on NHS patients, extracted from local Radiology Information Systems (RIS) and submitted monthly.
Reasonableness	Organisations should seek to fulfil reasonableness criteria when offering patients appointments for diagnostic tests/procedures. In summary, this means they should be offered at least two appointment dates and have at least three weeks' notice of the appointment.

For further information on reasonableness, please refer to the **Guidance and Documentation** section via Statistics » Monthly Diagnostic Waiting Times and Activity (england.nhs.uk) which covers: DM01-guidance-v-5.32.doc (live.com) and DM01-FAQs-v-3.0.doc (live.com)

Document Control

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V1.1	03/11/2010	Angie Mann	Minor amendments due to software modifications.
V1.2	04/07/2011	David Costin	Amendments to version number for 2.09.10e
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D3.0	29/11/2024	Christine Anthony	Rebranded to Magentus and aamendments to version 2.14.01
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Review Date			

Appointments

The Cris application is a patient-based information system, and it is therefore possible to generate an appointment, or a waiting list appointment via any mode. **Appointments** or **Direct Appointment** mode are however recommended for users who are exclusively responsible for making, changing or cancelling existing appointments/waiting list appointments, as Cris will automatically display and highlight the most appropriate screens and buttons.

Appointments Mode vs Direct Appointment Mode

The Appointments module has been developed to facilitate both manual and automatic allocation of appointments to as closely mirror on-site working practice as possible. As a result, the Cris application incorporates two different types of appointment mode, to provide users with the option to choose a mode which is most appropriate to their own circumstances.

Appointments Mode

Designed for use when making, changing or cancelling existing appointments, as well as placing requests onto waiting lists and rebooking blocks of appointments if a room is closed, or a session is cancelled.

This mode uses the **Diary Viewer** to allow you to rapidly enter all request cards, and assign/change appointments or place patients onto the waiting list one-by-one using drag and drop into an appropriate slot, or all at once, or in blocks using the auto slot-finder **Search Forward**.

The **Diary Viewer** also provides access to all diaries which you are authorised to view within the hospital you are based at, or across the Trust as a whole, to facilitate booking slots at other sites.

Direct Appointment Mode

Designed for use when making appointments which have already been assigned on paper, or which require a specific date, time and room. This mode is also recommended for placing batches of patients onto the **Waiting list,** or onto the **Planned list**.

Please note: This mode does not use the **Diary Viewer** and relies on the assumption that the user can guarantee that the slot required is available at the time of booking, without the need to refer to the **Diary Viewer**. It is possible to display the **Diary Viewer** whilst using **Direct Appointment** mode, although if the **Diary Viewer** is required **Appointments Mode** should be used instead.

Assigning and Managing Waiting Lists

Once an order or request has been acknowledged as **Received** or **Vetted and Accepted**, it can be assigned to a **Waiting List**. Alternatively, paper requests which have already been vetted can be directly entered onto a **Waiting List** as applicable - either ahead of being able to offer the next available appointment, or via the **Partial Booking** system, waiting for the patient to make contact to schedule their appointment.

Assigning a Request/Event to a Waiting, Partial Booking or Planned Waiting List

1. Load the patient required by entering their details; typing directly into Cris, using a relevant patient identifier, i.e. **Cris No**, **Hosp Number**, **NHS Number**, or **Surname**, **Forename** and **DOB**; or loading from a relevant worklist, i.e. **Orders**, **Vetting List**, or **Request List** and click **Change** or press [**Enter**].

   Alternatively, if entering a paper request directly onto Cris, press [**Esc**] or click on the **New Event** button to begin entering the first request card.

2. Check/complete **Referral Source**, **Ref. Location**, **Referrer**, **Examination Code(s)** and **Urgency** as required, then click on the **Waiting List** button. You will then be given the following status options to choose from:

Status	Description
Waiting	Use this status to indicate someone is on a normal waiting list and will be sent an appointment date in due course, or to indicate that the patient is waiting to be moved to **Partial Book 1** when the Trust is ready to issue a letter requesting them to call and book their appointment.
Partial Booking 1	Use this status to indicate that a letter has been sent to the patient requesting them to call and book their appointment.
Partial Booking 2	Use this status to send a reminder letter to a patient requesting them to call and book their appointment, after a **Partial Book 1** letter has already been sent. This letter often includes a deadline to call by, otherwise the request will be cancelled returned to the referrer.
Direct Booking	Use this status to indicate that one attempt has being made to contact the patient by telephone. Patients on this list will require a 2nd attempt to contact them by telephone. However if the 2nd attempt is unsuccessful, the Trust can then choose to send out a fully booked appointment to the patient.
Please note: Not all Trust's require all of the above **Waiting** statuses. It is also possible to associate different letter formats with different statuses, and to end date and status which are not in use and omit them from the pick list. It should however be noted Cris statuses are system wide and must not be amended without Consortium wide approval.	
Planned	Use this status to indicate the patient is being placed on a **Planned** list for a follow-up procedure at a later date. When using the **Planned** status, an extra field appears; **Date Appointment Wanted**, which requires you to enter a date for when an appointment is required. This will default to **Unknown** unless a date is entered. It is possible to type 3d, 3m or 3y to auto complete a date using today's date + 3 days, 3 months or 3 years etc. There is also an option to enter a comment relating to this event in the **Status Comment** field.
Please note: Any request placed onto the **Planned** list will be immediately omitted from all waiting list figures. In the event that a request is mistakenly added as **Planned**, it can be corrected by double-clicking the **Planned** status via the **Status** section in the **Event Details** tab, amending the status to **Waiting** instead of **Planned**. This does however require the **GENERAL** > **CHANGE_STATUS** security setting.	

3. If no **Waiting List** letter is required, press [**Enter**] or click the **Save** button to finish. If a letter is required, click on the **Print Letter** option before pressing [**Enter**] or clicking on the **Save** button.

Scheduling an Appointment

1. Load the patient required by entering their details; typing directly into Cris, using a relevant patient identifier, i.e. **Cris No**, **Hosp Number**, **NHS Number**, or **Surname**, **Forename** and **DOB**; or loading from a relevant worklist, i.e. **Orders**, **Vetting List**, or **Waiting List** and click **Change**.

2. Select their existing **Waiting**, **Partial**, or **Planned** event via the **Events** screen or worklist, and click **Change** followed by **Add to diary**.

3. Having done this, click the **Diary** icon ![diary icon] at the top of the **Main Menu** screen, and proceed to making an appointment via the **Diary Viewer**.

Please note: If working from the **Vetting List** or **Waiting List**, click the appropriate worklist option via the **Main Menu** screen. Use the filter boxes at the bottom of the screen to display all patients based on a particular **Status**, **Modality** or **Exam** followed by the **List** button to see all patients as applicable.

Making an Appointment via the Diary Viewer using Appointments Mode
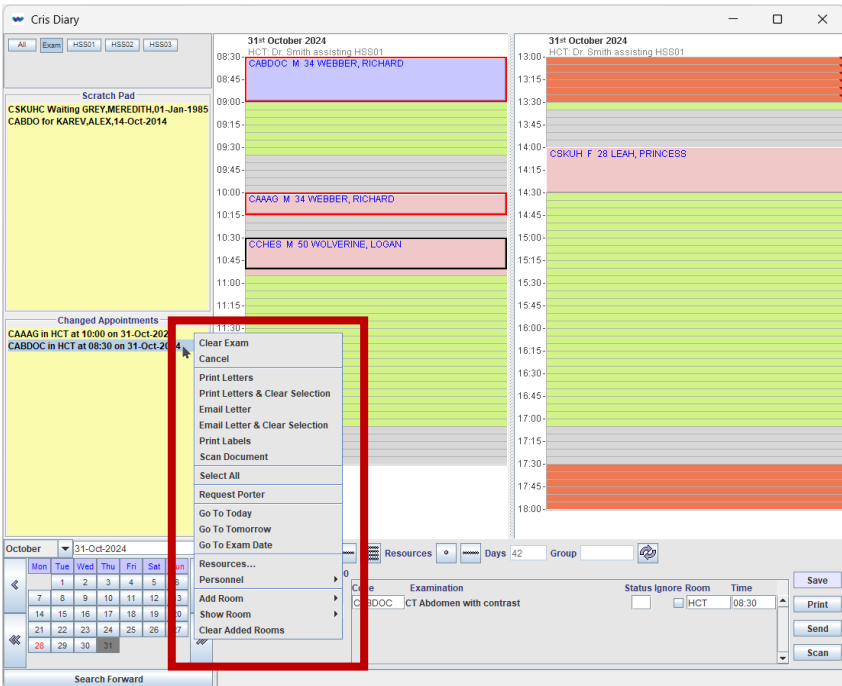
The Cris Diary Viewer Explained

The **Diary Viewer** ![diary icon] has been developed to reflect a paper-based diary as accurately as possible - allowing you to view free and booked slots on any date, in any room and to drag and drop required patient exams into slots as required, or automatically assign the next available appointments.

| No.	Description
1	**Available Rooms** This section of the **Diary Viewer** is used to set which rooms should be displayed for booking. The system automatically defaults to **Exam** and displays all diaries slots for rooms for which you are authorised to book the selected exam(s), at the hospital in which you are currently located. As a result, in most cases, **Exam** is suitable for everyday booking, although if required it is possible to select **All**, or another hospital site code in order to display, and book into any appropriate room throughout the Trust, or at other sites. **Please note**: The other hospitals will only be displayed if the XR Setting **APPOINT.AllowedSites** is set appropriately to show all hospitals.
2	**Scratch Pad** The Cris Appointments module has been designed to allow you to enter all requests card details onto the system using **Add to Diary** function, then assign appointments in batches. After each request card is entered, the patient's details are placed onto the **Scratch Pad**, you can then select each patient to either drag and drop them into an appropriate diary slot or use **Search Forward** function button to automatically assign the next available slot (See 9). It is also possible to drag patients from assigned slots back to the **Scratch Pad** in the event you need to rebook a room or re-arrange the selected day's schedule.
3	**Changed Appointments** Having assigned or changed an appointment, the patient's appointment details will be displayed on the **Changed Appointments** section to enable you to print letters for all patients at once, or one-by-one, or to simply **Clear Exam** if letters are not required. Accessed by right-clicking on either the **Scratch Pad** or **Changed Appointments** section, this menu provides additional functionality as follows:

	Clear Exam	Use this function to clear one, or all, selected patients and exams from the **Changed Appointments** section without printing a letter. i.e., save appointment(s), without printing a letter. **Please note:** Clear exam can also be used via the **Scratch Pad** in order to remove patients details without making any changes.
	Cancel	Use this function to cancel appointments. This feature is designed to allow clerks to record **Discretionary** or **Patient Change** cancels before proceeding to book an alternative appointment.
	Print Letters	Use this function to print appointment letters for one, or all selected patient appointments without clearing them from the **Diary** Viewer. For example, to check hard copy printouts before clearing patients. It will then be necessary to **Select All** and **Clear Exam** to complete the process.
	Print Letters & Clear Selection	Use this function to print appointment letters for one, or all selected patient appointments and clear them from the **Diary Viewer** at the same time.
	Print Labels	Use this option to print appointment labels which can be attached to request forms providing details regarding the appointment.
	Scan Document	Use this function if your PC is connected to a scanner to allow for document scanning. Scanning from the **Diary** will always use a **Document Type** of **REQCARD**. **Please note:** Ensure that **Scanner Setup** has been completed.
	Select All	Use this function to select all patients, on either the **Scratch Pad** or **Changed Appointments** section. For example, to print multiple letters, clear all, or use search forward for all patients.
	Request Porter	Use this facility to request a porter for the date of the appointment. This is an automatic feature and does not allow notes to be added to the record. If notes are required, please use the normal portering facilities.
	Go to Today	Use this function to return to today's date.
	Go to Tomorrow	Use this function to step forward by one day, or to quickly return to tomorrow's date if previously booking in the future.
	Go to Exam Date	Use this facility to go to the date of appointment for any patient highlighted on either of the **Scratch Pad** or **Changed Appointments**.
	Add Room	Use this function to add additional rooms at the current site, or for other sites in addition to the ones that are normally assigned to the relevant exam.
	Show Room	Use this function to see a day list for each room including available slots as an alternative to the **Appointments** worklist. The room will only remain for the current date and would need to be added again for any subsequent dates.
	Clear Added Rooms	Use this function to remove all rooms that you have added and return to only the standard rooms which the examination is authorised to take place.

Calendar View

To facilitate date selection, a calendar of the current or selected month is always displayed to allow you to easily select a date simply by clicking on it. Today's date is also automatically displayed in red.
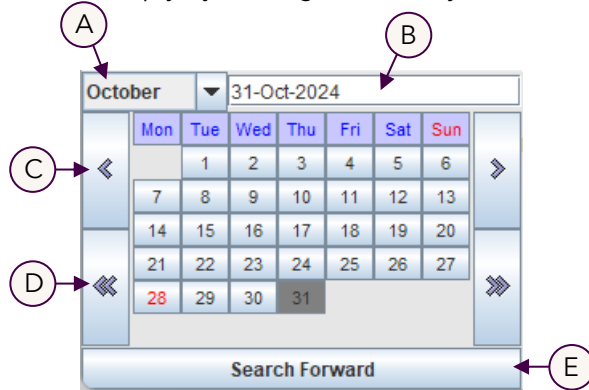
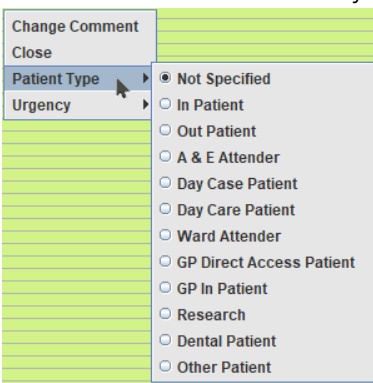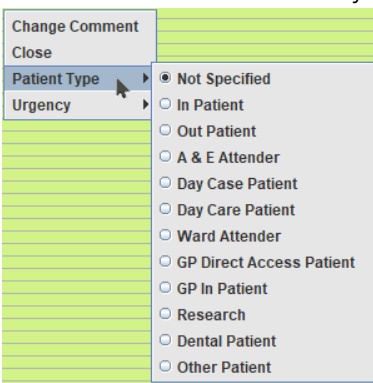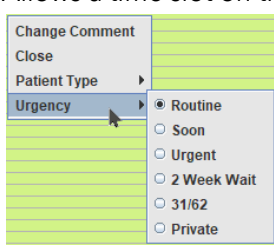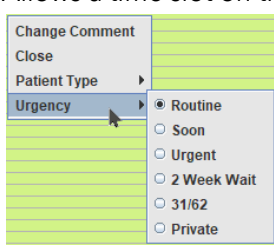|		
4	A	**Month Display** Provides a reference to the current month that you are booking appointments for or can be used to move forward one or several months by selecting the appropriate option via the drop-down arrow.
	B	**Current Booking Date** Provides a reference to the current date that you are booking appointments for or can be used to move forward to a specific date by typing it directly into the box and pressing **Enter**. It is also possible to type **D**, **W**, **M** or **Y** after a number in order to jump a number of days, weeks, months or years ahead. For example: 6W, 3M etc.
	C	**Move Forward/Backwards by a Week** For speed it is possible to move forward or backwards by one week, by clicking on the appropriate arrow displayed at either side of the calendar.
	D	**Move Forward/Backwards by a Month** For speed it is possible to move forward or backwards by one month, by clicking on the appropriate arrow displayed at either side of the calendar.
	E	**Search Forward** Automatic booking facility. Use this function to find the next available slot for one, or multiple, selected patients. This feature can also be used in conjunction with the calendar by clicking a date to search forward from, prior to clicking **Search Forward**. **Please note**: When assigning one or more examinations using this facility, please remember to select **Ignore** (see 13) any exams that you wish to book in the same time slots, otherwise more than one slot will be assigned.
5		Vetting The **Vetting** function button allows you to view any related protocols, and any other information entered at the time of vetting the request. Vetting information is also visible by hovering over the patient record either on the **Scratch Pad** or **Changed Appointments**. To return to the Cris Diary click one of the **Room** Diary views (i.e. Day, Week or Range).
6		**Current Booking Date & Room(s)**

	Displays the selected date and room(s) that you are currently assigning patient's examination(s) into. If room comments have been entered, for example - **Dr Smith assisting**, these will be displayed here and appear on hover help.

Changing Day Diary Set-Up (Room)

Providing you have sufficient security access you can also right-click at the top of the diary page, where room comments are shown, to access a menu which will enable you to select the following:

Change Comment	Allows a room comment to be entered or edited for the selected date and will display for that room.
Close Time Range	Allow room slots to be closed within a specified time range.
Close for Bank Holidays	Allow room slots to be closed within a specified time range.

7

Diary Slots

Appropriate diary slots for the selected exam(s) are automatically displayed on screen, split by AM and PM. For ease, standard times are also displayed down the side of the slots, i.e. 09:00, 09:15, 09:30, etc., although each slot is not necessarily 15 minutes by default, but can be 5, 10, 15, 20 minutes etc., visible by hovering over each slot. Cris automatically assigns the correct number of slots to each examination based on the timings that have been specified in the **ExamPerHospital** table settings. I.e., a 20-minute exam will be allocated 2 x 10 minutes slots, if the diary has been set-up in slots of 10 mins. All slots are colour coded as follows:

Green	Slots which are available for use based on exam type or group (of exams), day of the week and urgency level.
Red	Slots which are closed.
Grey	Slots which are unavailable either due to urgency level, exam type or group (of exams), day of the week, or duration of exam.
White	No diary available. I.e., weekends or no diary in place.

8

Booked Slots

Slots already allocated to patients will automatically be displayed in pink upon opening the diary. Hovering over the slot will enable you to view additional information such as the patient's name, DOB, Cris number, Event number, and booked examination, start time of the appointment, exam duration and any associated comments or alarm details.

All allocated appointments are colour coded to indicate their status as follows:

Pink	Slots already allocated to existing patients
Blue	The current patient you have selected, and whose details will also appear in the bottom section of the Diary Viewer screen.
Red Border	A red border around a patient slot means the patient has alarms.
Black Border	A black border around the slot signifies the patient is deceased and has been saved on Cris with a date of death. Appointment letters cannot be printed.

9	**Slot Information** This menu can be accessed by hovering over a slot. The **Diary Setup** allows system managers to assign any combination of slot durations (i.e. 5, 10, 15 min etc.), urgency level, exam, group of exams or patient type settings to each room. These settings are then displayed via hover help in the diary, for example if you wish to book an appointment at 09:10 you should simply hover between 09:00 and 09:15 to display the 09:10 slot. **Changing Diary Setup (Slots)** Providing you have sufficient security access you can also right-click on any appropriate slot and select the following:

Change Comment	Allows a comment to be added to a particular time slot on the diary.
Close	Allows a time slot on the diary to be closed.
Patient Type	Allows a time slot on the diary to be set for a specific patient type.
Urgency	Allows a time slot on the diary to be set for a specific urgency.

10		**Alternative Calendar Views** The **Diary Viewer** can be viewed for one day, one week, or any range of days ahead. Upon choosing a date using either a week or range view you will be returned to the normal day view in order to make the appointment itself.
		Day View
		Week View
		Range View - This function is useful for direct booking or making/changing appointments when speaking to patients directly. The default value is **42** but this can be amended as required.
		Refresh - enables users to refresh any type of diary view to incorporate any changes that have occurred during any inactivity. For example, talking to patients.

11	**Current Patient's Appointment Details** Whenever you select a patient either on the **Scratch Pad**, **Changed Appointments** or an existing booking via the **Diary Viewer**, the patient's appointment details will be displayed including all relevant examinations, appointment date, room and time.
12	**Current Patient's Demographic Details** Whenever you select a patient on either on the **Scratch Pad**, **Changed Appointments** or an existing booking via the **Diary Viewer**, the patient's name and DOB will be displayed here in conjunction with their exam details below.
13	**Letter** In most cases, the Cris application will automatically generate an appropriate context specific appointment letter, however if you require a slightly different type of prep to normal, for example - diabetic or renal failure prep, or different prep based on a combination of examinations, you should use this field to select the appropriate option to override the default letter associated with the examination by double-clicking on the field or press [**F4**] on your keyboard.
14	**Urgency** The Cris diary set-up allows for each slot to be allocated an urgency level, for example: **3** = **Soon**, **5** = **Urgent**, **7** = **2 Week Wait**, etc. Therefore, if a **Soon** or **Urgent** slot is required you should amend **Urgency** as required. If you do not amend **Urgency** when attempting to book **Soon** or **Urgent** slots, those slots will remain greyed out.
15	**Ignore** This function will display if any ignored examinations that you would like to schedule into the same slot as other examinations taking place during the same visit. For example, an Ultrasound Abdomen (UABDO) and Ultrasound Guided Biopsy Abdomen (UABDOB) may be assigned two separate slots, but if the UABDOB has the **Ignore** button ticked, both exams will be scheduled into the same slot. **Please note**: Wherever possible, it is very important to use this function even when adding appointments to the **Waiting list**, as quite often this is overlooked, and two separate appointments are subsequently assigned at the time of booking.
16	**Save** The **Save** button can only be used if you wish to add an examination from the **Diary Viewer**, which is not recommend as this should be undertaken by clicking **Send** which will bring you to the **Event Details** screen, where you can add an examination and click **Add to Diary**. **Print** This button should be used if you wish to print a one-off appointment letter for the patient whose details are currently selected/displayed on screen. If however you have made appointments for a number of patients, you should print letters via the right-click on the **Changed Appointments** section (see 3). **Send** This button can be used to send the request details of the patient selected on screen back to the main system in order to amend details about the request or patient. **Scan** Use this feature to scan a request card for the patient whose details are currently displayed on screen.

Assigning an Appointment via the Diary Viewer

1. Load the patient required by entering their details; typing directly into Cris, using a relevant patient identifier, i.e. **Cris No**, **Hosp Number**, **NHS Number**, or **Surname**, **Forename** and **DOB**; or loading from a relevant worklist, i.e. **Orders**, **Vetting List**, or **Request List** and click **Change** or press [**Enter**].

   Alternatively, if entering a paper request directly onto Cris, press [**Esc**] or click on the **New Event** button to begin entering the first request card.

2. Check/complete **Referral Source**, **Ref. Location**, **Referrer**, **Examination Code(s)** as applicable, followed by any other relevant details:

Field Function	Description
Intended Clinician	If required, it is also possible to specify a required radiologist for the appointment via the **Intended Clinician** field. This field should only be used if diary slots have been set up to include specific staff.
LMP	If required, it is also possible to specify Last Menstrual Period (**LMP**) prior to clicking on the **Add to Diary** button, although if you do attempt to bypass this field whilst booking an LMP-specific examination, you will be prompted by Cris.
Practitioner	If possible, you should also complete the **Practitioner** field to record which clinician authorised the request you are appointing/placing on the waiting list. Otherwise, if the Vetting Module is in use, and the event has been vetted this field should already be completed.
Urgency	Amend the urgency from **1** = **Routine**, as applicable, i.e. **3** = **Soon**, **5** = **Urgent**, **7** = **2 Week Wait** etc. to access the appropriate diary slots.
Letter	In most cases, the Cris application will automatically generate an appropriate context specific appointment letter. However, if you require an alternative prep to standard (i.e. Diabetic or different prep based on a combination of examinations) you should use this field and select via [**F4**] key to override the default letter.
Request Date	Ensure that the request date corresponds to the date the request was made to correctly calculate DWT.

3. Once all appropriate details are complete, click the **Add to Diary** button. Repeat the process for any other requests/events using this method then click on the **Diary Viewer** icon. If you are only booking a single appointment, simply go directly to the **Diary Viewer** after selecting **Add to Diary**.

4. Having clicked on the **Diary Viewer**, use the **Diary Calendar** to choose an appropriate date.

   To book an appointment, highlight the patient/examination on the **Scratch Pad**, then click and hold the left mouse button down over the patient/examination and drag and drop it onto a free appointment slot. The mouse pointer needs to be between the grey lines which separate each individual slot as follows:
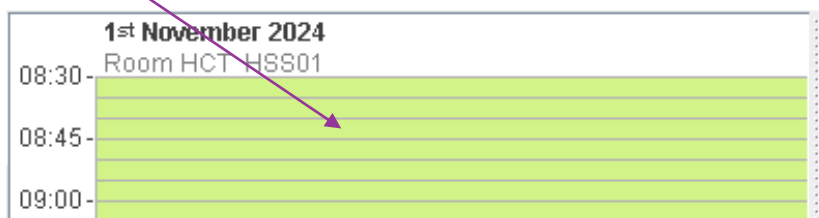
The system will then take out an appropriate number of slots for the examination and display the appointment in the **Diary Viewer**.

Please note: A small rectangular icon will appear underneath the mouse pointer as you are dragging, to indicate both that you are dragging the event, and that it is possible to drop the event into a slot as required. Alternatively, if when dragging an event a no-entry sign is displayed beneath the mouse pointer, this indicates that from your current position it is not possible to drop the appointment into that slot.

5. Having assigned a slot, the event will be moved to the **Changed Appointments** section ready for an appointment letter to be printed, and the booked appointment will be displayed in the diary.

6. If you are only booking one examination proceed to 8. Otherwise, simply repeat the same process to assign any other examinations taking place as part of the same appointment. If you want to schedule more than one exam in the same slot, for example - Ultrasound Abdomen and Ultrasound Guided Biopsy Abdomen, please refer to the instructions on how to ignore an exam in the next sub-topic below.

Please note: It is also possible to hover over the appointment to view additional information about the appointment. Additionally, it is also possible to stretch or shrink the appointment in the event that more or less time is required than is normally the case. To do this simply drag and drop the bottom edge of the box representing the appointment as required. You can stretch or shrink the appointment in one-minute increments.

7. Finally, to complete the appointment and print a single patient's letter click the **Print** button located on the bottom right of the screen.

    Alternatively, to print letters for more than one patient; right-click on the **Changed Appointments** section to display the menu and choose **Select All** from the resulting menu, right-click to display the menu again and select **Print Letters & Clear Selection**. If a letter is not required, you should right-click via the **Changed Appointments** section and click **Clear Exam**.

Please note: It is also possible to allow Cris to automatically assign the next available appointment slot using the **Search Forward** function button (See The Cris Diary Viewer Explained, page 8). If you wish to assign more than one appointment to the same slot, remember to tick **Ignore** on one of the exams prior to clicking on **Search Forward** or both exams will be assigned individual slots.

Ignore an Exam

In certain circumstances, it is sometimes necessary to schedule an examination into the same slot as other examinations taking place during the same visit. For example, scheduling Ultrasound Abdomen and Ultrasound Guided Biopsy Abdomen in the same slot. To do this:

1. Enter or review the patient's request card/order as normal then click on the **Ignore** box next to the second, and/or third examination before clicking on the **Add to Diary** function button.

2. Having done this, reload the **Diary Viewer**, and highlight the patient/exam via the **Scratch Pad** as usual. You should then either select a date and drag and drop the first examination from the **Scratch Pad** into a slot as normal or use **Search Forward** to automatically assign a slot.

3. All examinations will then be assigned the same slot, and you can complete the appointment by printing a letter if applicable or selecting **Clear Exam** if a letter is not required.

> **Please note:** Ignored examinations are also displayed in the diary alongside normal examinations. In addition, please remember to use **Ignore** wherever possible when assigning appointments to the **Waiting List**, as quite often this is overlooked, resulting in two separate appointments being inadvertently assigned at the time of booking.

Changing Appointments

It is possible to change an appointment at any time when assigning the patient's initial appointment via the **Diary Viewer**, simply by dragging and dropping the appointment from its assigned slot to an alternative slot from the diary. However, if a patient subsequently wishes to change their appointment there are two methods to consider as follows:

Method One: Discretionary Changes without Resetting the DWT Clock

If you change an appointment using this method, the patient's DWT will not be affected and will be calculated from the request date to date of attendance.

1. Load the patient required by entering their details; typing directly into Cris, using a relevant patient identifier, i.e. **Cris No**, **Hosp Number**, **NHS Number**, or **Surname**, **Forename** and **DOB**; or loading from a relevant worklist, i.e. **Orders**, **Vetting List**, and click **Change** or press [**Enter**].

2. Select their existing appointment either via the **Events** tab, or the worklist and click **Change** followed by **Add to diary**.

3. Having done this reload the **Diary Viewer** and highlight the patient/exam via the **Scratch Pad** as usual. You can also right-click and select **Go to Exam Date** to load the date of the original appointment.

4. Select a new date or use the **Range View** to visually offer a new appointment date then click on a specific date to offer alternative appointment times but do not make a new appointment yet.

    - Scenario One: If the patient is happy with the new date offered proceed to Point 5.

    - Scenario Two: If the patient decides to keep their original appointment, right-click via the **Scratch Pad** and choose **Clear Exam** to retain their original slot and close the **Diary**. The process is now complete.

5. Right-click the appointment via the **Scratch Pad** and select **Cancel** followed by **Discretionary Appt Change** in addition to recording a comment if applicable.
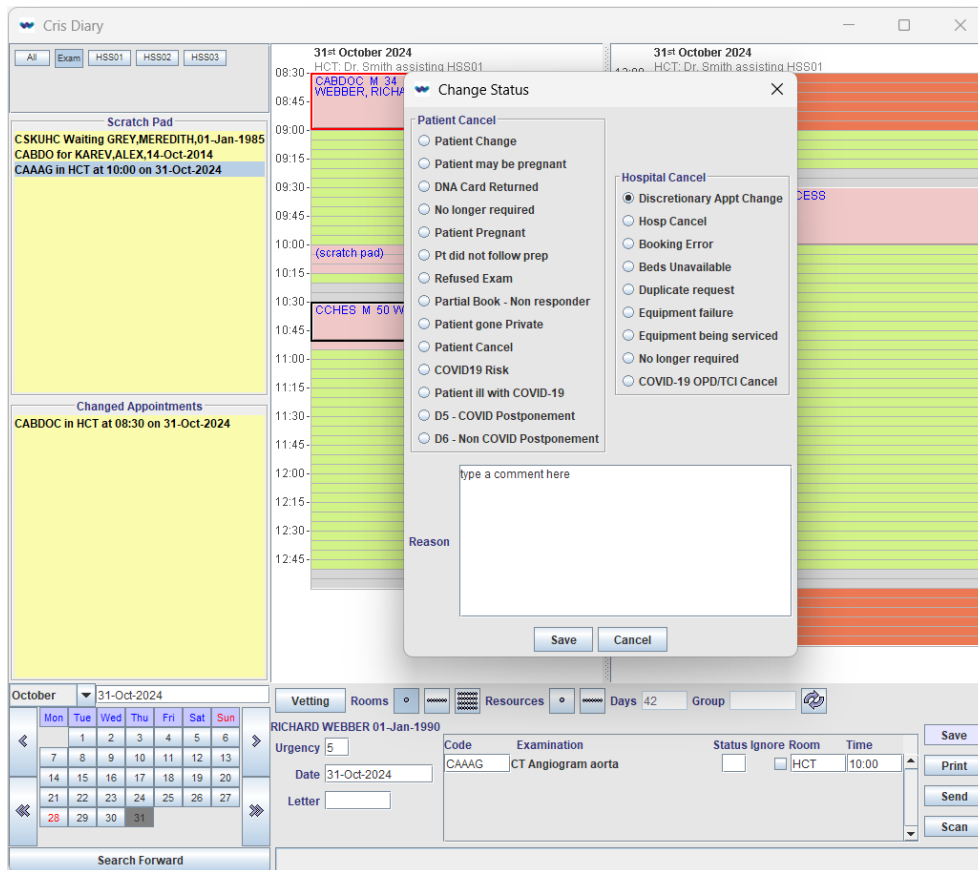
6. You can now drag and drop the examination from the **Scratch Pad** into the new slot or use **Search Forward** to automatically assign a slot.

7. You can complete the appointment by printing a letter if applicable or selecting **Clear Exam** if a letter is not required.

Method Two: Changing an Appointment and Resetting the DWT Clock

If you wish to reset the clock when a patient changes their appointment, it is essential that the correct procedure is followed to ensure that the waiting times are recorded accurately. Using this method the clock will continue to tick until the date of the last appointment that the patient cancelled after which it will be reset to 0. The clock will then start ticking again from the date of the appointment the patient last cancelled to the date of their final appointment/attendance.

Please note: For Scottish sites the DWT clock is reset on the day of cancellation and will start ticking again once this date has passed in accordance with New Ways Guidelines. This will only occur if **GENERAL.HospitaLCountry** is set to **Scotland** via XR Settings.

Alternatively, if this procedure is not followed, then the DWT clock is not stopped and restarted.

1. Load the patient required by entering their details; typing directly into Cris, using a relevant patient identifier, i.e. **Cris No**, **Hosp Number**, **NHS Number**, or **Surname**, **Forename** and **DOB**; or loading from a relevant worklist, i.e. **Appointments**, and click **Change** or press [**Enter**].

2. Select their existing appointment either via the **Events** tab, or the worklist and click **Change** followed by **Add to diary**.

3. Having done this reload the **Diary Viewer** and highlight the patient/exam via the **Scratch Pad** as usual. You can also right-click and select **Go to Exam Date** to load the date of the original appointment.

4. Select a new date or use the **Range View** to visually offer a new appointment date then click on a specific date to offer alternative appointment times but do not make a new appointment yet.

   - Scenario One: If the patient is happy with the new date offered proceed to Point 5.

   - Scenario Two: If the patient decides to keep their original appointment, right-click via the **Scratch Pad** and choose **Clear Exam** to retain their original slot and close the **Diary**. The process is now complete.

5. Right-click the appointment via the **Scratch Pad** and select **Cancel** followed by **Patient Change** in addition to recording a comment if applicable.
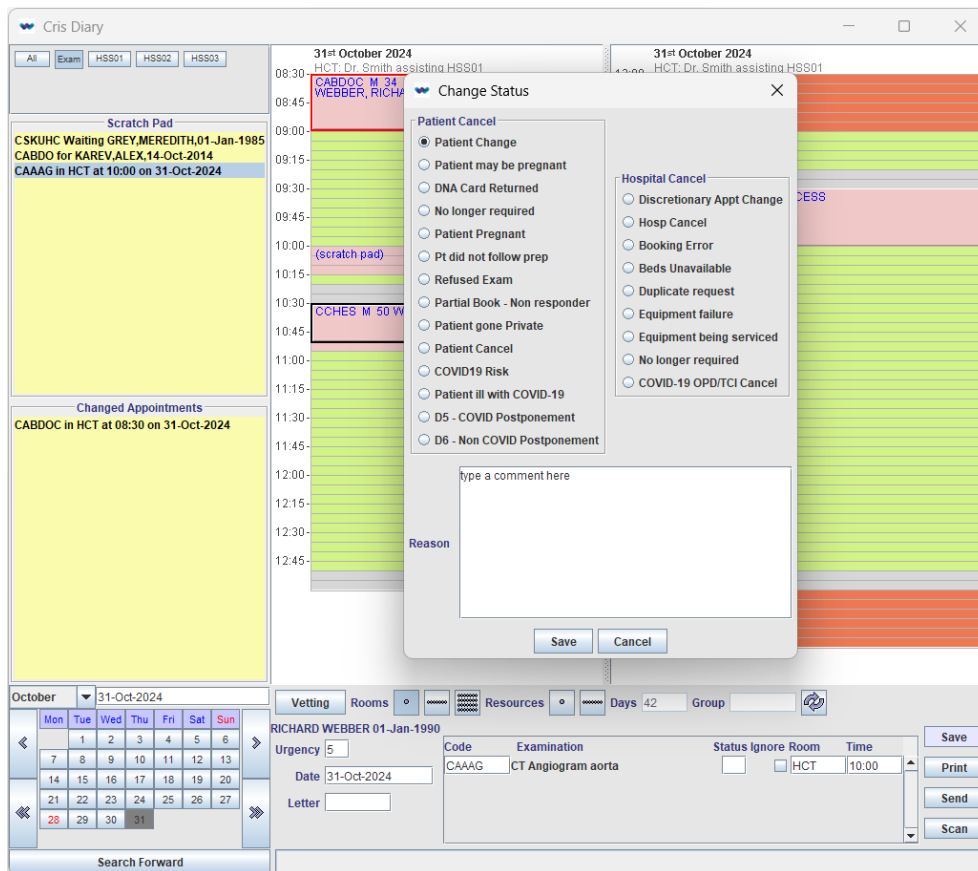
6. You can now drag and drop the examination from the **Scratch Pad** into the new slot or use **Search Forward** to automatically assign a slot.

7. You can complete the appointment by printing a letter if applicable or selecting **Clear Exam** if a letter is not required.

Add Appointments back onto Waiting List

In the event that a patient calls to change their appointments but upon being offered alternatives appointments they cannot agree a new date and time you should follow the same procedure as above but instead of rebooking the appointment as the last step, add it back onto the **Waiting List**.

How Cris stops and resets the DWT clock when a patient changes their appointment

No.	Description
1	DWT clock starts on date request made.
2	Original appointment date.
3	**Cancelled - Discretionary Appointment Change** - Date of change is recorded but clock is not reset.
4	New appointment date - Clock continues ticking from original request date (No.1).
5	The date the appointment letter was printed – a copy of the printed letter is visible by clicking the **Documents** button of the **Event Details** tab.
6	**Cancelled** - **Patient Change** - Date appointment was changed. **Please note**: The DWT clock continues to tick until the original appointment date. After this date it will be zeroed, and the waiting time will be calculated from the date of the original appointment to the date of attendance. The only exception to this is if more than one **Cancelled** - **Patient Change** has occurred, as this would replace the original appointment date. Discretionary appointment changes are not taken into account.
7	New appointment date - Clock stops when this appointment is attended, upon arrival of the patient.

Calculating waiting times with and without clock reset method

The following waiting time calculations apply:

- If the patient attends for their original appointment, 2 – 1 = 21 days wait
- If the patient's appointment is changed using a discretionary change, 4 – 1 = 31 days wait
- If the patient's 2nd appointment is changed without patient change method, 7 – 1 = 32 days wait
- If the patient's 2nd appointment is changed using patient change method, 7 – 2 = 11 days wait

You will notice in this scenario that unless the **Patient Change** method is utilised, waiting times will appear much longer than Department of Health (DoH) guidelines intended for certain scenarios, and you should therefore apply this method correctly in order to reset and restart the clock where applicable.

Viewing Future Appointments

It is possible to view all existing appointments for a given date by clicking the **Appointments** function button, via the **Menu** screen. When the screen first loads, you will see all patients due to arrive for their appointments at the hospital on the current date.
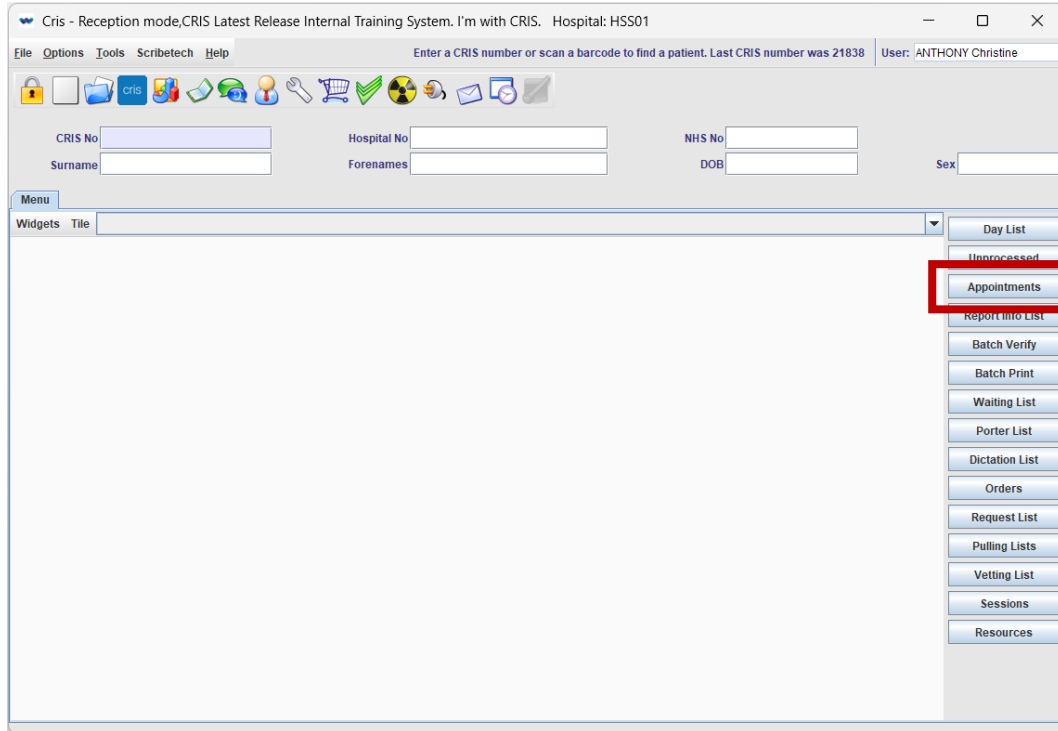
Alternatively, to display a clinic list for a given date, simply complete any number of the filter boxes at the bottom of the screen, i.e. **Site**, **Date**, **Room**, **Modality** or **Exam** and press [**Enter**] or click on the **List** button. It is then possible to print the list via the **Print** function button.
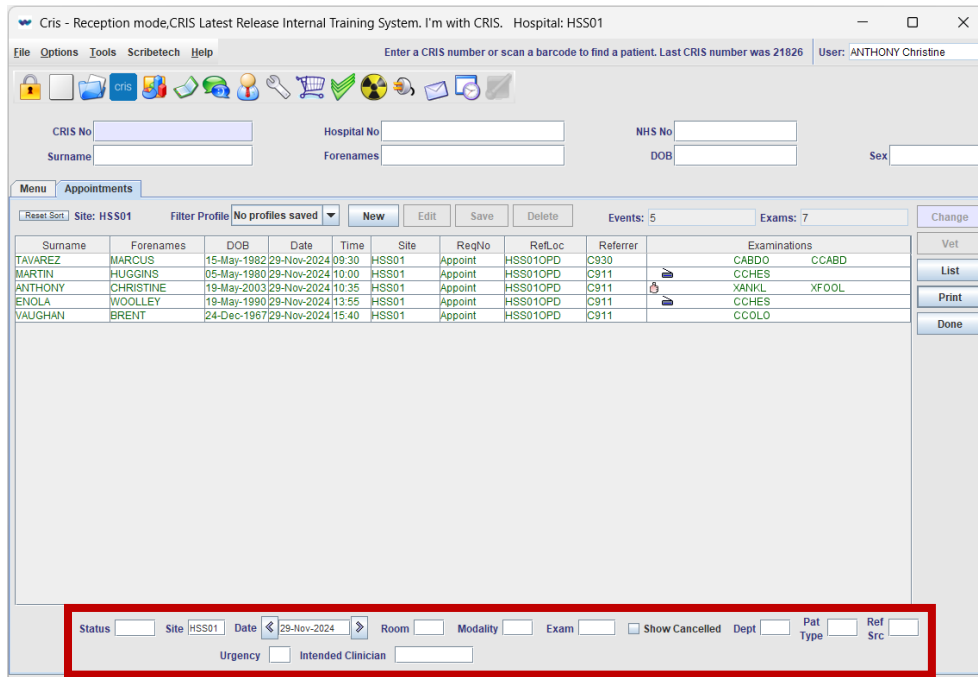
Entering A Request Card

It is possible to acknowledge receipt of a request card by entering it onto the patient record, but without the need to assign the request to the overall waiting list or assigning a specific.

1. Load the patient required by entering their details; typing directly into Cris, using a relevant patient identifier, i.e. **Cris No**, **Hosp Number**, **NHS Number**, or **Surname**, **Forename** and **DOB**; and click **Change** or press [**Enter**].

2. In the **Events** screen, click **New Event**. Having done this enter the request card details via the **Event Details** screen as normal and click **Request**.

3. You will then have the option to **Receive**, **Accept** or **Reject** the request. You can enter the practitioner who has either accepted or rejected the request. You also can enter a comment relating to this request in the **Status Comment** field.

Please note: It is also possible to amend the **Request Date** to reflect either the date the request was made or the date the request was received according to Trust practice via the **Back Log Mode** function; **Tools** > **Session** > **Back Log Mode**

4. If a letter or label is required or you wish to scan the request card, select the appropriate checkbox and either press [**Enter**] or click on the **Save** button. Otherwise, either press [**Enter**] or click on the **Save** button. The request will now be displayed on the patient's record on the **Events** tab with the date the request was received and can be attended as normal when the patient arrives for their exam.

Managing DNAs

In order to correctly calculate DWTs, it is essential that all DNAs are managed on a daily or regular basis otherwise they will continue to be counted in the waiting times until managed. Procedures for handling DNAs fall into two categories as follows:

- DNA and Rebook

- DNA and Return Card

In all cases Magentus recommend that the Trust wait until the DNA is activated by the system at midnight on the day of the appointment. This means processing DNAs on the day after the appointment as follows:

1. Select the **Appointments** worklist via the **Menu** screen.

2. Choose a required date before today to display DNAs using the **Date** field by clicking on the left arrow at the bottom of the worklist.

3. Review each DNA by opening the event record by double-clicking or click **Change** and rebook any appointments as applicable.

DNA and Rebook

If the patient calls and an alternative appointment is made the clock will automatically reset at the date of the DNA and ahead of the patient's final examination date. To do this, right-click the patient record and select **Add to Diary** from the list before proceeding to the **Diary Viewer** to make a new appointment.
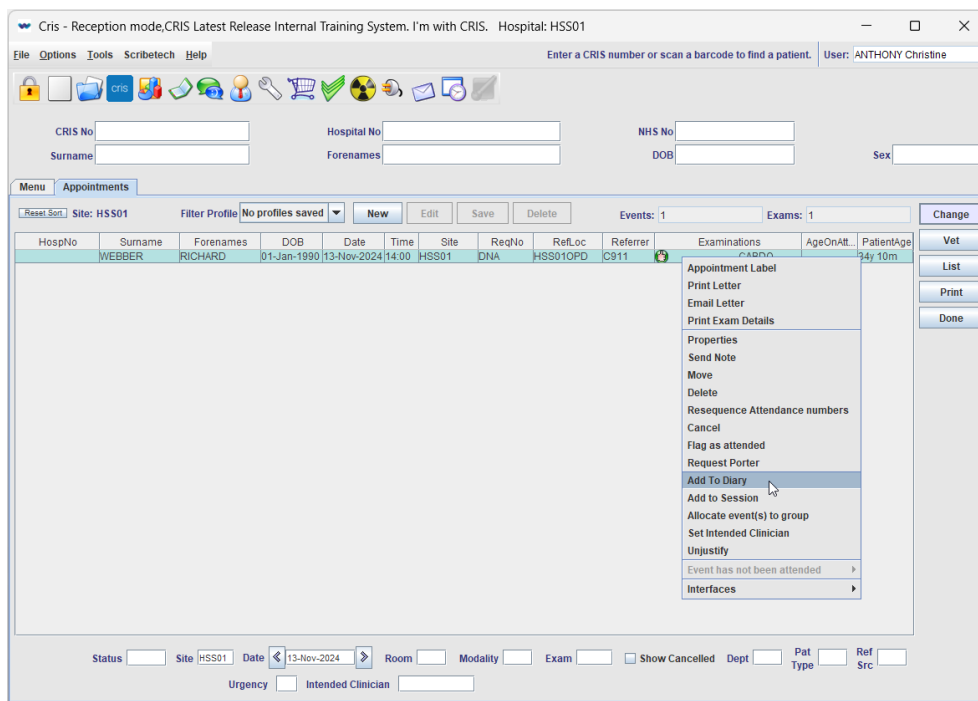
DNA and Return Card

If the patient has not contacted the hospital and a decision is made to cancel the request and return the card to the referring clinician, it will be necessary to use the status category; **DNA – Card Returned**. This way the request will no longer be counted in the waiting times as the examination will not now take place or will need a new request from the referrer if still required.

1. Right-click the patient record in the **Appointments** worklist and select **Cancel** from the displayed list.
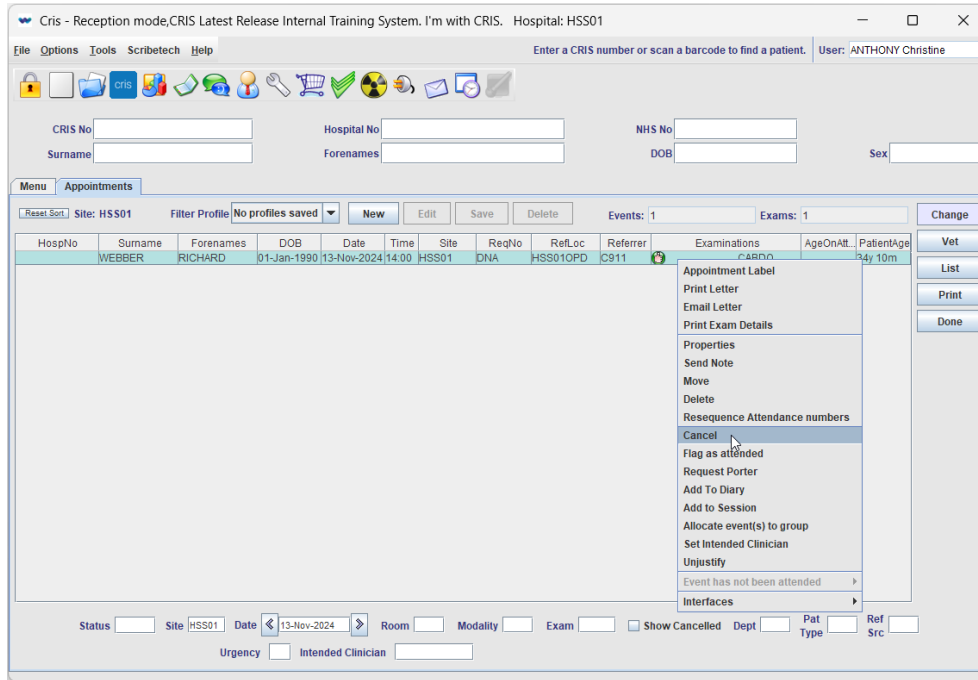
2. The **Cancel Event** tab is displayed. Select the **DNA Card Returned** option from the **Patient Cancel** section of the tab and insert a comment in the **Status Comment** box, e.g., **Patient DNA twice**.

3. Tick **Print Letter** in the **Print Option** section tab to print a DNA letter to be sent to the referrer.

4. Click on the **DNA Card Returned** button to complete the process.
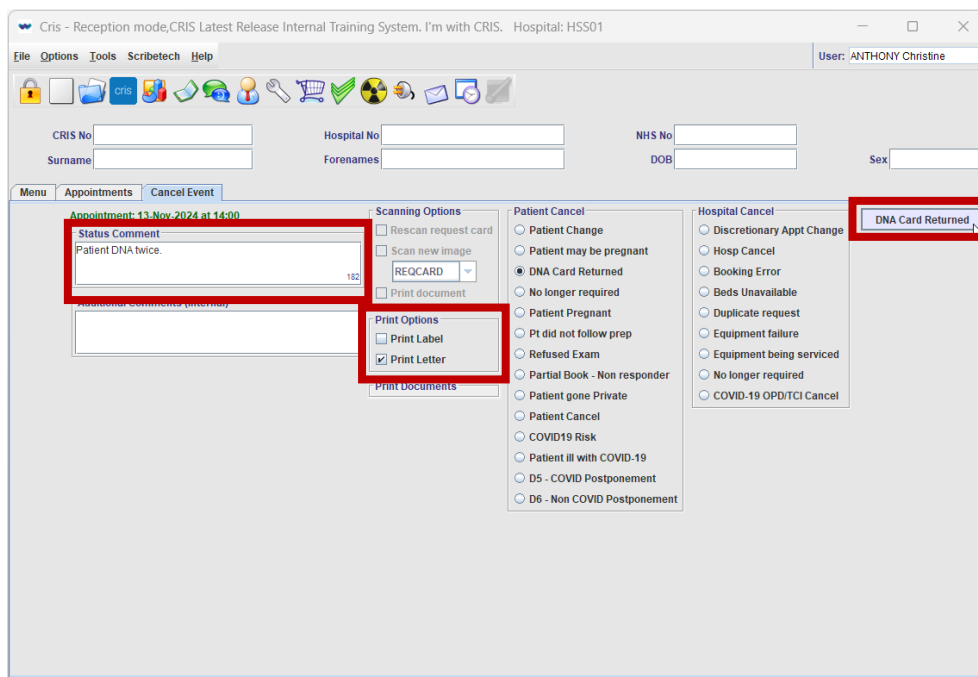
Cancelling an Appointment

5. Load the patient required by entering their details; typing directly into Cris, using a relevant patient identifier, i.e. **Cris No**, **Hosp Number**, **NHS Number**, o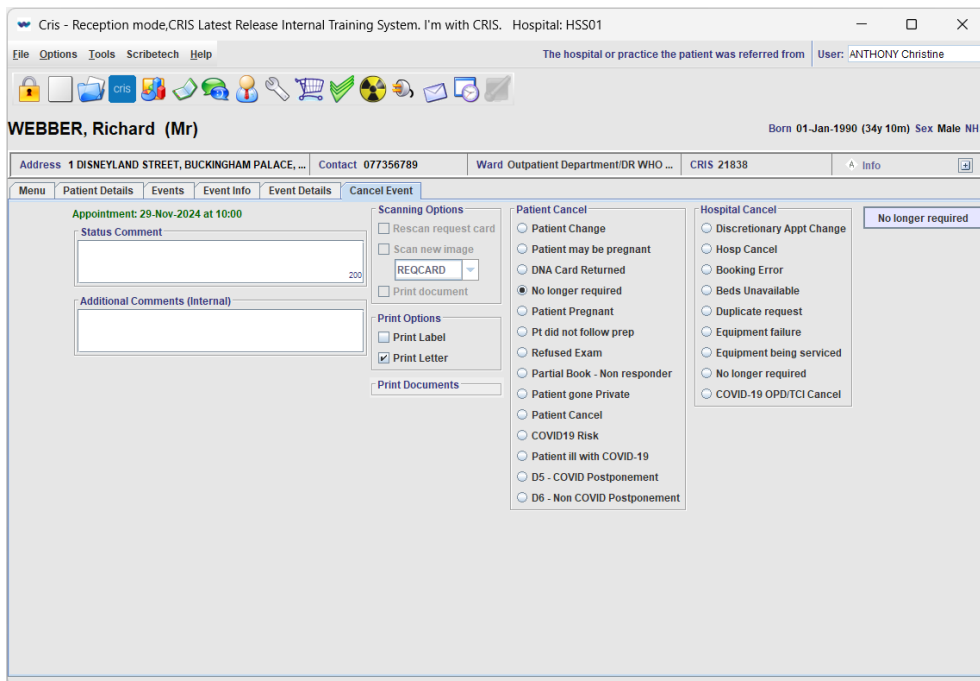r **Surname**, **Forename** and **DOB**; or loading the event from a relevant worklist, e.g., **Appointments** and click **Change** or press [**Enter**].

6. If searched via patient identifier, select their existing appointment from the **Events** screen and click **Change**.

7. In the **Event Detail**s tab, click on **Cancel**.

8. In the **Cancel Event** screen, choose a reason for the appointment cancellation using the option buttons in the **Patient Cancel** or **Hospital Cancel** sections of the tab, e.g., **No longer required**.

9. It is also possible to enter additional details regarding why the appointment is being cancelled via the **Status Comment** field.

10. If a cancellation letter is required, click on the **Print Letter** checkbox and click on the **No longer required** function button. Otherwise, if a letter is not required, simply press [**Enter**] or click on the cancellation option function button.

Please note: It is also possible to cancel the appointment directly via the **Event** screen by highlighting the relevant appointment and selecting the appropriate option via the right-click functions menu.

Attending a Request or Appointment

To attend the patient who has arrived for their appointment or to attend requests that have been mark as **Received** or **Accepted**, you should simply do the following:

1. Load the patient required by entering their details; typing directly into Cris, using a relevant patient identifier, i.e. **Cris No**, **Hosp Number**, **NHS Number**, or **Surname**, **Forename** and **DOB**; or loading the event from a relevant worklist, e.g., **Appointments** and click **Change** or press [**Enter**].

2. If searched via patient identifier, select their **Request** or **Appointment** from the **Events** screen and click **Change**.

3. In the **Event Details** tab, click on **Attend**.

4. Having done this simply click **Attend** on the final **Attend Event** tab to complete the transaction to print labels, if required.

Please note: You should not attend a patient directly from the **Waiting List** at any type of waiting statuses, as any event placed onto a type of **Waiting List** status must be made into an **Appointment** prior to their attendance. If an appointment is not required, the event should simply be marked as a **Received** or **Accepted** request which can subsequently be attended upon the patient's arrival in the department.

Making an Appointment in Direct Appointment Mode

The use of **Direct Appointments Mode** has the effect of disabling the **Diary Viewer**, providing access to standard **Diary** status and **Special** status. **Special** status should only be used in exceptional circumstances as it negates all system validation and allows you to override all booking restrictions (i.e. Book an appointment at 0300 on 25/12/2024). This enables users to break the rules when required.

1. Load the patient required by entering their details; typing directly into Cris, using a relevant patient identifier, i.e. **Cris No**, **Hosp Number**, **NHS Number**, or **Surname**, **Forename** and **DOB**; and click **Change** or press [**Enter**].

2. In the **Events** screen, click **New Event** and enter the **Ref. Location**, **Referrer**, **Lead Clinician** (if appropriate) and the **Mobility** details as required via the **Event Details** screen.

3. Having done this, enter the first required examination, and press [**Enter**] to the **Room** field where you should enter the required appointment room, or press [**F4**] to choose from a list of options, followed by [**Enter**] to the **Time** field where you should enter a valid appointment time (24-hour format e.g. 1500). If any further exams are necessary, enter each additional examination followed by the valid room and time details required for the appointment.

Please note: It is essential that the room and time details you enter for the examination are valid for the existing room diaries, otherwise you will receive an error message informing you that the time you have entered is not available and you will need to edit your details to proceed.

4. You should then continue pressing [**Enter**] completing any other required information as you move round the screen, until you reach the **Date** field. Enter a valid appointment date and press [**Enter**] and followed by the **Appointment** function button.

5. In the **Appointment** screen, select to tick the appropriate radio button. If a letter or label is required, or if you wish to scan the request card, click on the appropriate field and either press [**Enter**] or click on the **Save** function button. If you do not require any of these, press [**Enter**] or click on the **Save** function button.

Changing An Appointment in Direct Appointment Mode

When using **Direct Appointments Mode**, it is still necessary to consider which method is required prior to changing the patient's appointment.

Method One: Changing an Appointment without Resetting the DWT Clock

1. Select the patient's existing appointment via the **Events** screen and click **Change**.

2. Amend the appointment appropriately by re-entering a new room, time or date as required.

3. Having done this press [**Enter**] or click the **Appointment** function button, then click **Diary** status followed by the **Save** function button in the final screen.

Method Two: Changing an Appointment and Resetting the DWT Clock

1. Select the patient's existing appointment via the **Events** screen and click **Change** followed by **Cancel** then select **Patient Change** and **Save** to record that they have cancelled the original appointment which will reset their DWT to 0 days.

2. You should then reload the patient record using [**F9**], and then amend the cancelled appointment by re-entering a new room, time or date as required.

5. Having done this press [**Enter**] then click the **Appointment** function button, then click **Diary** status followed by **Save**.