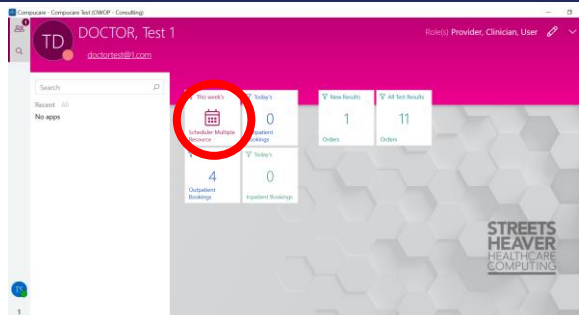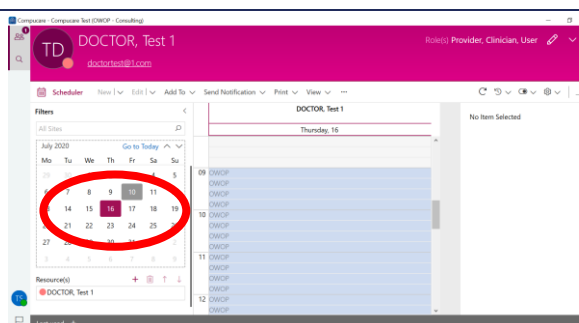# Making an outpatient booking at OneWelbeck

1. Log into Compcuare and click the "Scheduler Multiple Resource" pane on your home screen or search for the 'Scheduler Multiple Resource' App from the home screen.

2. Once the App opens, you will see diary view of the available slots of one or more clinicians.

1. Light shading shows availability, dark shades show bookings:

a. Blue slots show outpatient availability

2. Open the filter pane to alter the view:
    a. Click on dates on the calendar to choose the day you wish to check.
    b. Click on "+" or the dustbin icon to add or remove a specific clinician.

TIP: You can click on a date and drag the mouse to a different date in the future to get the system to show all available slots in the number of days you have selected.

TIP: to select more than one, non-consecutive day in Scheduler, you can press Control on your keyboard + select the days by clicking on it.

TIP: You can adjust the size of the slots displayed (e.g. 15 mins) by clicking on the clock in the top right of the screen.

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3. Click on a slot within a shaded outpatient availability area to book an appointment.

4. An outpatient booking form will open, the required fields are:
   a. Patient
   b. Episode of care (referral)
   c. Length of appointment
   d. New or Follow-up
   e. Billing Episode (you will select whether the patient is self-paying or insured).

5. In the patient and episode of care fields, you can use the search button (the magnifying glass icon) to search our database:
   a. Patient - Enter the patient's surname and click the search
   b. Episode of care – Click search once a patient is selected and all the existing episodes of care will be listed.

6. You may need to create a new patient and / or a new episode of care (referral) to complete the booking (see following sections).

TIP: Red Asterisks (*) indicate required fields, you cannot proceed until these are completed.

TIP: If your search returns a large number of results (e.g. surname "Jones") you may need to use the "Next" button to scroll through the pages of results.

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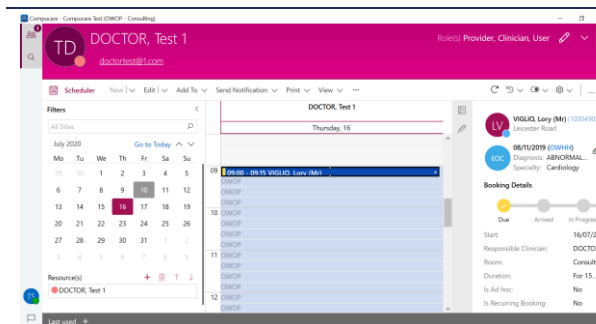
7. Once the form is complete, click "Save". The booking will now appear in the Scheduler and Outpatient bookings Apps

Creating a new patient
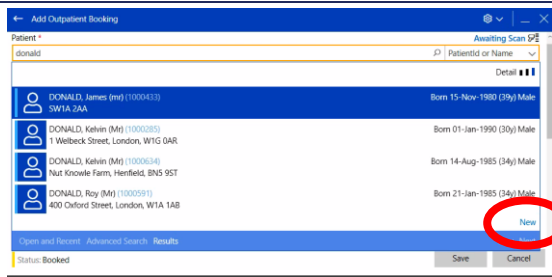
8. Before you can create a new patient, you have to make sure that the person is not yet in our Database. Enter the surname of the person you'd like to add and press Enter or click the search button (the magnifying glass icon).
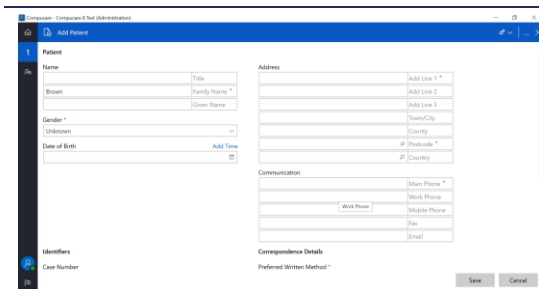
9. Use the "Next" button to scroll through if there is more than 1 page of results (e.g. "Jones")

10. If the search does not return a suitable match based on name and date of birth, click on the "New patient" button.

TIP: You can change the lookup value to Date of Birth or Mobile No by opening the dropdown menu highlighted by arrow 3 above and choosing the appropriate field.

11. The Add patient form includes a large number of fields. Only a few of these are mandatory (such as Name, Family Name, gender, main contact number and postcode).

12. Once you are finished click on Save on the bottom right-hand side of the screen.

13. You will be returned to the outpatient booking screen with the new patient selected. You will now need to create an Episode of Care (referral) for this patient (see following section)

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Create a new Episode of care (referral)

14. An episode of care records information about the patient's referral (e.g. referrer).

15. Before you can create a new Episode of Care you have to make sure it is not yet in our Database. With the correct patient selected in the patient box, click the search button (the magnifying glass icon). All Episodes of care for the patient will be displayed. For a new patient, none will exist.

16. To create a new Episode of Care click on "New" while in the relevant menu within a New Inpatient Appointment form.

17. Fill out all mandatory fields:
    a. Site
    b. Source
    c. Referral Date
    d. Specialty
    e. Referrer (please select "REFERRER NOT KNOWN / REFERRER NOT IN COMPUCARE" if you do not it).

18. At the time of referral, "Diagnoses" is a term indicating the problem reported by the patient or referrer.

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