

PM Scheduling – Appointment Letters

Information in this Quickstart refers to Scheduling Appointment letters generated through the Post Document process. These are different to the letters run manually through the appointment notifications. Advantages of the Post Document scheduling letters are:

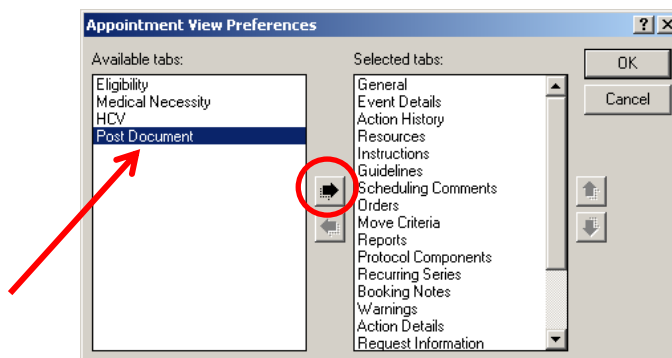
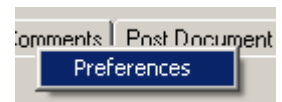
- Can be set to print automatically during appointment processing, saving time at the point of booking.
- Greater ability to customise the letters for different departments, clinics, or appointment types.

Information: Not all appointment types are set to be able to generate these letters – contact Clinical Applications Support Unit if you require this ability for any of your appointment types.

View Post-Document Scheduling Letters

In order to view the letters that have been generated, you must activate the appropriate tab in the Appointment View or Appointment History View in Scheduling.

- Double click an appointment to open **Appointment View**. You can also click the Appointment History button to open Appointment History View.
- Right-click any one of the tabs, and select **Preferences**.
- On the Available tabs, select **Post Document**, then click the right-facing arrow to move it to the Selected tabs. You can also use the Up/Down arrows to change the order the tabs will appear.



Once set up, you can view letters in Scheduling Appointment book for a particular appointment by clicking on the **Post Document** tab in **Appointment View** / **Appointment History View**.

Post Document Id	Parent Entity Id	Parent Entity Name	Document Type Code	Document Layout	Document Create Date Time	Document Create User	Print Date	Manual Create Indicator
40665315	2336216	SCH_EVENT	Confirmation Letter Gait Lab	ch_app_conf_gait_lab	19/10/2011 12:08 PM	085021		No

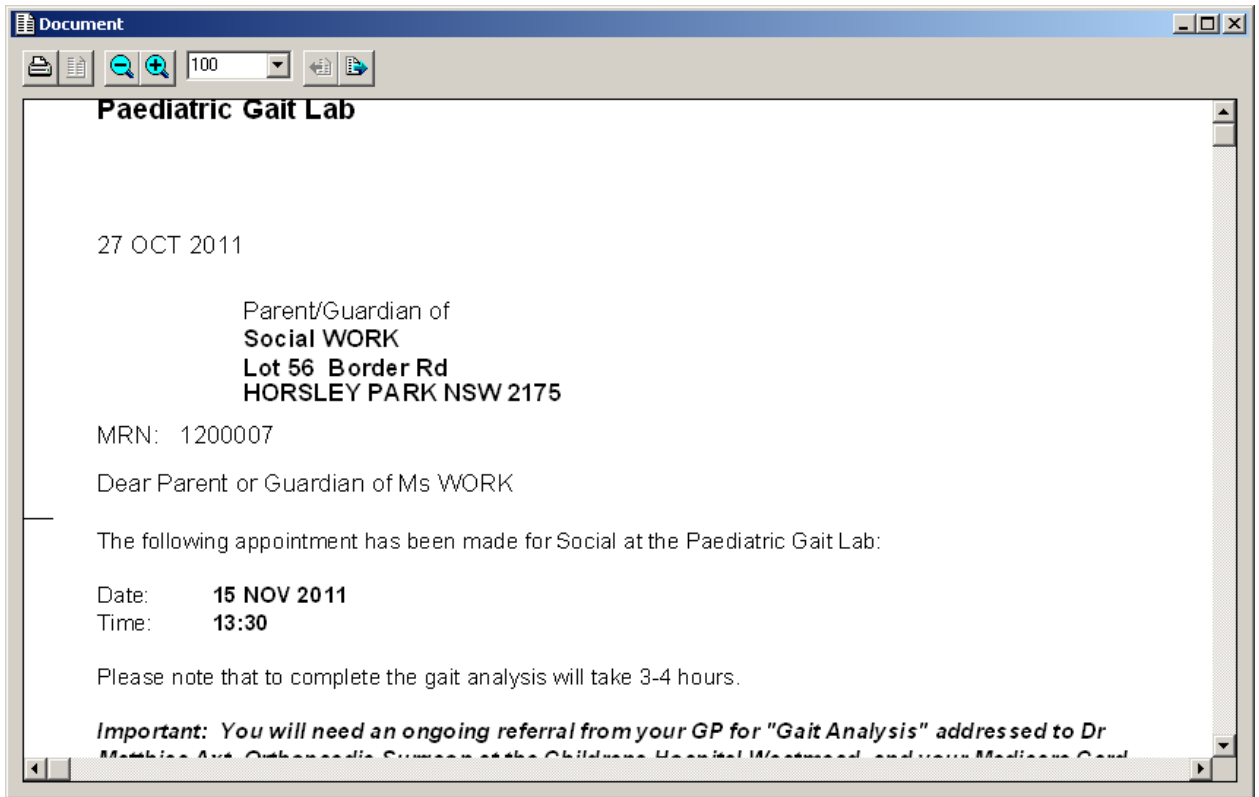
On the Post Document tab:

- **Document Type Code** indicates the name of the letters generated.

- **Document Create Date Time** indicates when it was created.
- **Print Date** indicates whether the letter has been printed, and when.

Tip: Click on a column heading to sort the letters by that column (alphabetically or by date).

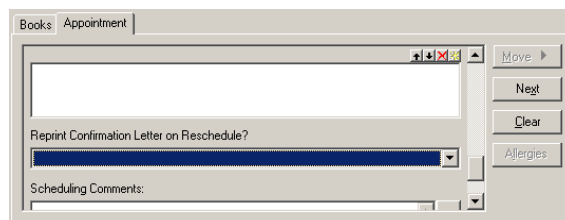
- Double click a letter to open it.
- Click the **Print** button to print the letter again.



Reprint Confirmation Letter on Reschedule

In some scenarios, an appointment may be booked to hold a place pending confirmation by the Clinician, before the patient is notified of the appointment. In these scenarios there may be occasions where the appointment is rescheduled at the Clinician's request, but it is not appropriate to send a Reschedule letter as the patient may not have been aware of the initial appointment.

To allow for this scenario, some appointment types have had an extra field added to the appointment details.



Selecting 'Yes' to **Reprint Confirmation Letter on Reschedule** will cause a Confirmation Letter to be generated with the new appointment details, rather than a Reschedule letter. However, you must make sure this question is adjusted in the Work in Progress pane in order for the rescheduled appointment to acknowledge the answer. You can do this 2 ways, while the appointment is in Work in Progress:

- Locate the question 'Reprint Confirmation Letter on Reschedule' in the Appointment Tab, and select 'Yes' or 'No' as required. Click Move again, to move the adjusted details to Work in Progress.
- Right click on the appointment in Work in Progress, and select Appointment Attributes. Then go to the Details tab and adjust the answer to the question there. Then click OK.

Once the Reprint question has been adjusted as needed, schedule and confirm the appointment as usual. If you selected 'Yes', a new confirmation letter will be generated.