

# Expanse for Medical Secretaries – End-User Guide

This guide provides step-by-step instructions for medical secretaries using the Meditech Expanse system across HCA Healthcare UK. It supports day-to-day workflows including accessing patient records, managing consultant diaries, booking appointments, and reviewing test results. The content is based on approved Expanse training materials and verified workflows.

This guide is suitable for both employed and independent medical secretaries. Independent medical secretaries who only use Patient Keeper may disregard sections relating to Community Wide Scheduling (CWS).

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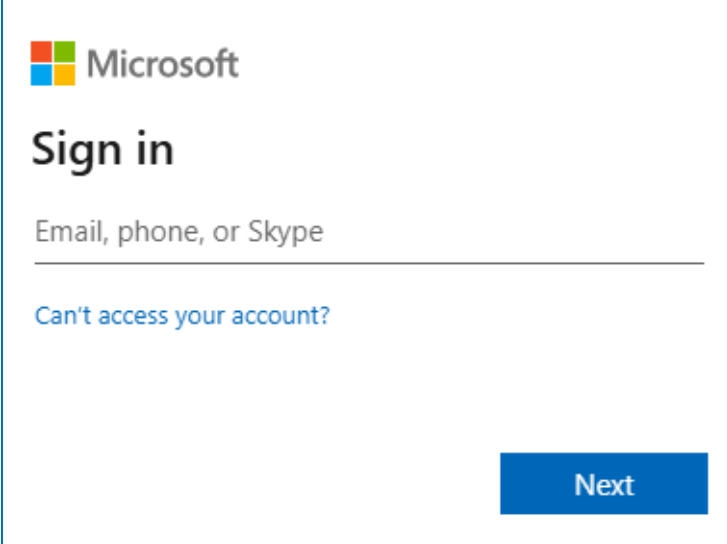
## Logging into Expanse

Copy this link into your Chrome browser (not Edge) <https://ehr.hcauk.meditech-uk.cloud>

(don't click the link directly)

When logging into Expanse for the first time it will ask you for:

Your username: It will be your HCA email address



Microsoft

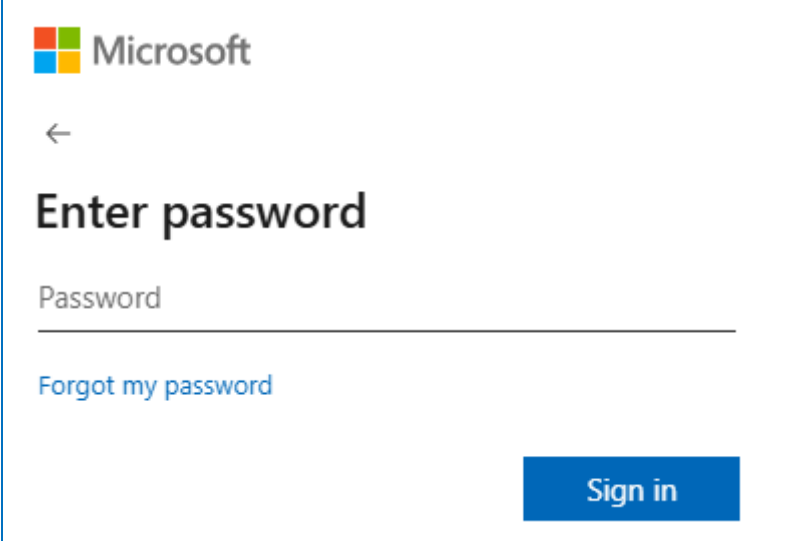
### Sign in

Email, phone, or Skype

[Can't access your account?](#)

Next

Your password: It will be the same as your Windows login.



Microsoft

←

### Enter password


Password

[Forgot my password](#)

Sign in

After you sign in, the "Stay signed in?" window will appear.

We recommend selecting No if you don't use the same desktop for all your logins.



### Stay signed in?

Do this to reduce the number of times you are asked to sign in.

☐ Don't show this again

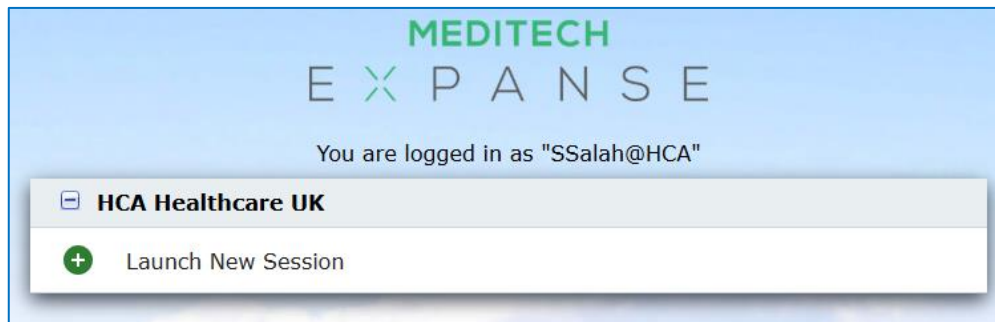
No Yes

When signing in, you'll first see the Microsoft sign-in window.

Use your HCA email address as your username, and your password will be the same one you use to log in to Windows.

Finally, you'll see the Meditech Expanse screen with the Launch New Session box.

Click on the + Launch New Session to start using Expanse for your workflow.



**N.B As part of security, staff that use Expanse will be prompted to create a PIN number. This is planned to initially be “1234” at which point, when entered the system will prompt you to create your own 4-digit PIN number.**

Once you have launched the session you may see the below window when logging in, click on the **lookup** arrow

Please click the first option: **ABLVLBMC63** WITHIN **Client** (you do not need to select a location)

Client Lookup

Search

| Mnemonic     | Name         |
|--------------|--------------|
| ABLVLBMC63   | ABLVLBMC63   |
| ACCCTLPAN    | ACCCTLPAN    |
| ACUEMBO1     | ACUEMBO1     |
| ACUEMBO2     | ACUEMBO2     |
| ACULAB3      | ACULAB3      |
| ADSLNTE      | ADSLNTE      |
| ALDECAC02L01 | ALDECAC02L01 |
| ALDECAD01C01 | ALDECAD01C01 |
| ALDECAD01C02 | ALDECAD01C02 |
| ALDECAD01L01 | ALDECAD01L01 |
| ALDECAN02C03 | ALDECAN02C03 |
| ALDECBC01C01 | ALDECBC01C01 |
| ALDECBOGDC01 | ALDECBOGDC01 |
| ALDECCBGDC01 | ALDECCBGDC01 |
| ALDECCBGDC02 | ALDECCBGDC02 |
| ALDECCJ02C01 | ALDECCJ02C01 |
| ALDECCN01C01 | ALDECCN01C01 |
| ALDECCU02C01 | ALDECCU02C01 |
| ALDECCXGDC01 | ALDECCXGDC01 |
| ALDECIG01L01 | ALDECIG01L01 |

Locator

Mnemonic

Name

Prior

Next

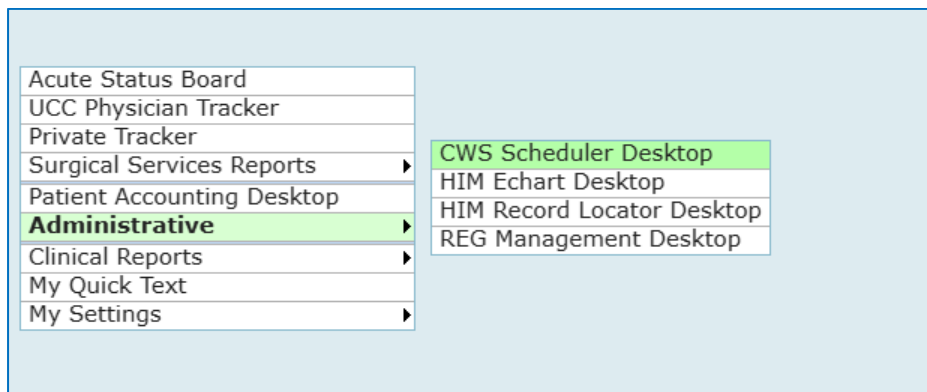
Cancel

Then click **OK/Save**

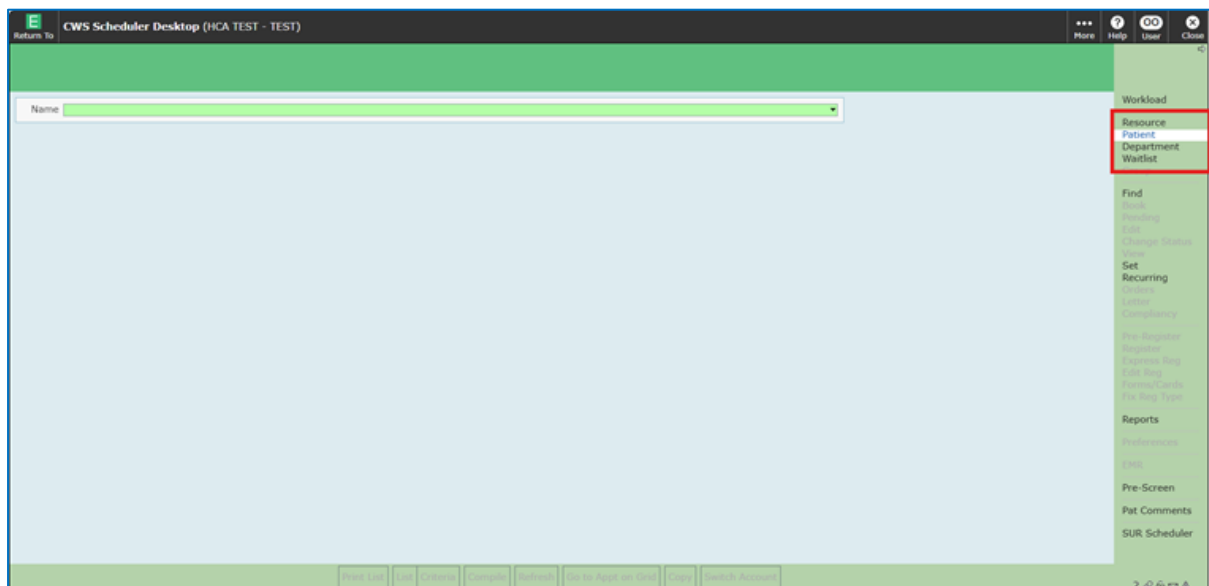
## Introduction of the CWS Scheduler Desktop

We'll need to start by accessing the CWS desktop.

To do this, go to the **Main Menu**, select **Administrative**, then choose **Community Wide Scheduling**, and finally click on **Scheduler Desktop**.

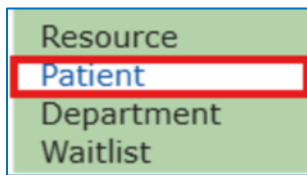


Next, the **CWS Scheduler Desktop** will open, where you'll notice a **Name** field located in the center of the screen.



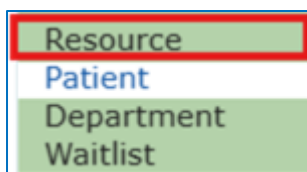
The available modes will have different menu options when selected

- o **Patient Mode**
- o **Resource Mode**
- o **Department Mode**
- o **Waitlist Mode**



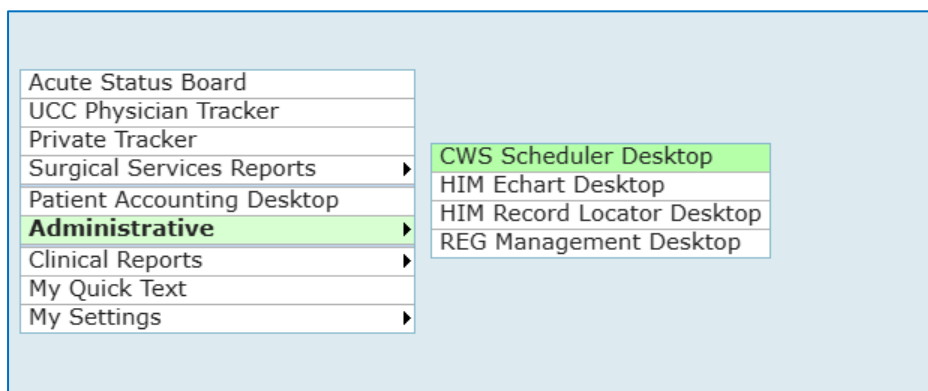
On the Functions menu, it defaults to Patient mode, which lets us search for a specific patient and book the appointments through the patient, however you must already know what date and time you want to book the patient in for as you cannot see the diary and availability through this way.

The more user-friendly option is to use the **Resource function**.

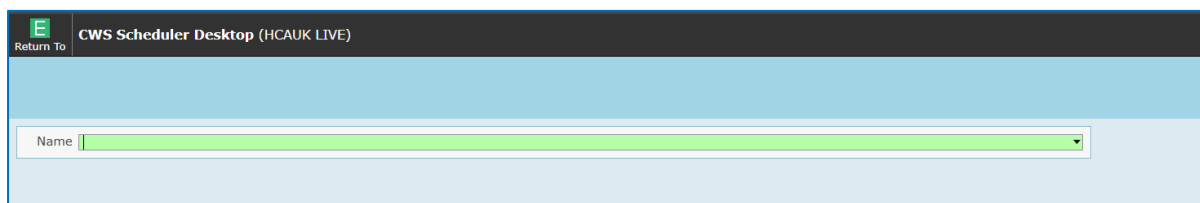


## How to Locate Patient Test Results – Via Diagnostics Tab in EMR

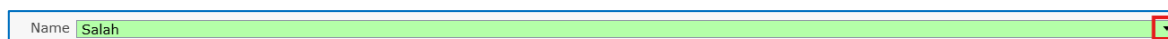
To find and view patient test results, go to the Main Menu, select **Administrative**, then choose **Community Wide Scheduling**, and finally click on **Scheduler Desktop**.



Next, you can open the **CWS Scheduler Desktop**, where you'll notice a **Name** field located in the centre of the screen.



**Type the name of the patient** you're searching for, i.e Salah and select the **LookUp** function to find the right encounter.



Select the **encounter**.

|    | Med Rec Num<br>NHS Number | Name            | Birthdate<br>Age/Birth Sex | Address<br>Primary Phone                                      | Other Names | General Practitioner |
|----|---------------------------|-----------------|----------------------------|---|-------------|----------------------|
| 10 | X000000595                | Salah,Shahira   | 10/01/1992<br>33/Female    | 47 Alexander Road<br>Birmingham, B27 6ER<br>000000000000      |             |                      |
| 8  | X000000769                | SalahOP,Shahira | 10/01/1992<br>33/Female    | 47 Alexander Rd<br>Birmingham, West Midlan...<br>078000000000 |             |                      |

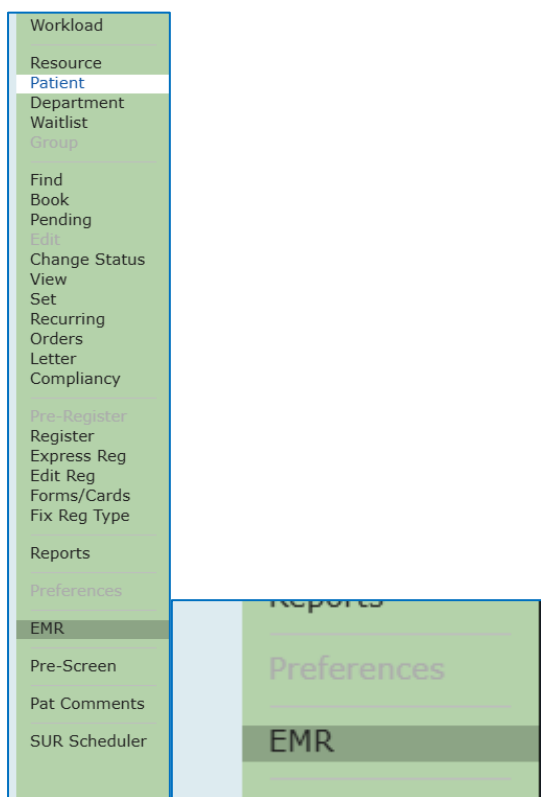
**NB:** Please note that for any international patients who has a surname such as “AL-XXXX” Please enter the surname as it reads; **do not**, change their surname so its “XXX-AL”

**NB:** All patients who have previously been entered as “XXX-AL” will need to be changed to its correct formation. (This will completed be as Patient Access or the medical secretary come across these patients

**NB:** Please note there is a character limitation in Expanse.

If the patients name exceeds 30 characters, please complete their surname and then the initial of their first name.

From the **CWS Scheduler Desktop**, you can then access the patient's chart by choosing the **EMR** – “Electronic Medical Record” function from the **Function Menu**.





## Introduction to EMR - “Electronic Medical Record”

Once you have clicked **EMR** on any patient record, you will be taken to the below:

This contains several subcategories of the patients EMR including:

Next, The **Search Patient Chart** feature functions like a personal search engine within the patient’s chart to locate specific results or reports.

The **Accordion** or **Expand** button allows users to **collapse** or **expand all widgets** to either **view** or **hide content**. This button is available in both the **Summary** tab and the **Reference** panel for easy navigation and improved workflow efficiency.

- **Summary** - This is a general overview of the patient including:
  - Patient Demographics
  - Current Medications
  - Allergies

- Orders (Including a searchable patient chart function)
- Visits (Initial, Past, Most Recent & Future)
- Nursing Assessments
- **Activity:** The **Activity** tab displays the **current events of the visit in reverse chronological order**, with timestamps for each intervention. The **Activity Log** on the right allows filtering of events, and additional filters can be applied by clicking the **Filter** button, selecting criteria, and clicking **Apply**.

| DATE       | DESCRIPTION   | LOCATION               | VISIT PROBLEM | STATUS | BY |
|------------|---------------|------------------------|---------------|--------|----|
| > 05/03/25 | Inpatient     | COCWH - WH S 2nd Floor | ACL repair    |        |    |
| > 25/02/25 | Daycase       | EH 2nd Floor           |               |        |    |
| > 16/09/24 | Recurring     | SD Physiotherapy       |               |        |    |
| > 16/09/24 | Inpatient     | COCEH - EH 2nd Floor   | Surgery       |        |    |
| > 16/09/24 | Clinical      | EH Pre-Assessment      | Pre-surgical  |        |    |
| > 16/09/24 | SD Outpatient |                        |               |        |    |

- **Flowsheets:** Use the Flowsheets page to review patient data, such as assessments, medication administrations, and reports (Pathology or external medical reports) for a patient's visit.
- **Health Management:** The ongoing clinical management of the patient
- **History & Problems:** Use the History and Problems page to view a patient's active, current, and past problems.
- **Administrative:** This tab you can find additional registration information for the patient, insurance details contact details, any Advance Directives and clinical trials. The appointment section displays past and future appointments for the patient. These will include appointment type, date, location, and the clinician.
- **Other Clinical:** This contains relevant clinical data not included in the **Summary** tab, including allergies and special indicators. You can review these from here by clicking **Edit** or you can review them from the **Reference panel**. **Personal Notes** can be added here by clicking the **Edit** button.
- **Workload Items:** The Workload Items tab displays the workload items that were entered for the selected patient from a clinical setting.
- **Medications:** Use this page to view a patient's medications.

- **Nurse/Allied Health:**

| DATE           | DESCRIPTION                     | AUTHOR                     | TYPE            |
|----------------|---------------------------------|----------------------------|-----------------|
| 05/03/25 15:36 | Nursing pre-discharge checklist | Filipe, Helder             | Nursing         |
| 05/03/25 14:26 | Therapies Hx Sheet              | Template, Registered Nurse | Joint PT and OT |
|                | Recorded: 05/03/25 14:27        |                            |                 |
| 05/03/25 14:24 | NEWS2 (Standard)                | Template, Registered Nurse | Nursing         |
|                |                                 | Template, Registered       |                 |

The Nurse/Allied Health tab displays Nursing and Allied Health Professional (AHP) documentation. Potentially helpful for physio reports and what else?

Use the Filter button to refine results by specialty, category, or time frame.

Click Show All Visits to expand the view and include previous visits.

To view assessments, click on the assessment entry or the Document icon as shown in the screenshot below.

- **Provider Notes:**

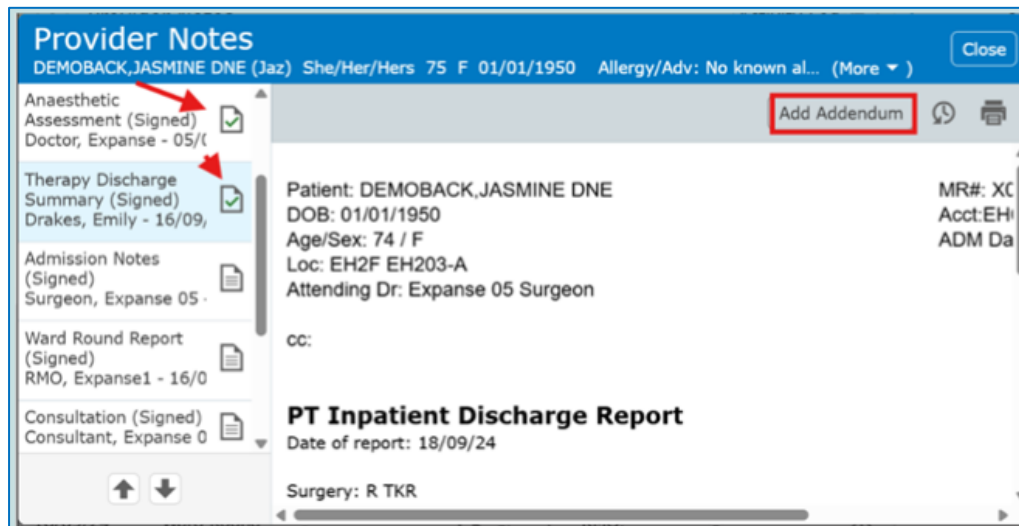
| ACTIVITY DATE                          | DOCUMENT                   | PROBLEM                   | STATUS | BY                  | SPECIALTY   | Hx |
|--|----------------------------|---------------------------|--------|---------------------|-------------|----|
| Today 12:29                            | Gynaecology Inpatient Note | Polyp of corpus uteri (+) | Signed | Surgeon, Expanse 03 | Obstetrics  |    |
| Today 12:25                            | Gynaecology Operation Note | Polyp of corpus uteri (+) | Signed | Surgeon, Expanse 03 | Obstetrics  |    |
| Today 12:13                            | Gynaecology Operation Note | Polyp of corpus uteri (+) | Draft  | Surgeon, Expanse 03 | Obstetrics  |    |
| 24/03/25 - Selected Visit Registration |                            |                           |        |                     |             |    |
| 04/03/25 13:22                         | Gynaecology Operation Note |                           | Signed | Surgeon, Expanse 02 | Gynaecology |    |

The **Provider Notes** tab contains clinician-entered patient documentation, including **notes and letters for inpatients**.

It displays details such as **activity date, document type, problem, status, and author**. Notes may have statuses like **Viewable, Signed, Draft or Cancelled**, with icons which if you click will display the document.

Clicking the **document icon** opens an overlay where the document can be viewed in full.

**Documents with Addendums:** Once an addendum has been added to a signed-off note, the system will indicate this change (including dates and descriptions). After the addendum is signed, users can return to the Provider Notes tab and view the original document; the Addendum will be clearly displayed at the top of that document.



- **Diagnostics:** Diagnostics is where all diagnostic exam and test results, including:
  - **Laboratory, (Microbiology, Pathology, Blood Bank,)**
  - **Imaging Reports**
  - **Cardiovascular Reports**
  - **Other Speciality.**

| Diagnostics   | Provider Notes  | Nurse/Allied Health |
|---|---|---------------------|
| History & Problems                                    | Administrative  | Other Clinical      |
| Summary   | Activity  | Flowsheets          |
| <div> <div>⊕</div> <div>Diagnostics</div> </div>      |   |                     |
| Selected Care Settings : All Time : All Subcategories |   |                     |
| ACTIVITY DATE   | TYPE  | STATUS              |
| 10/10/25 10:38  | Mammography Preliminary Report                          | Signed              |
| 10/10/25 10:19  | Radiology Report  | Draft               |
| 08/10/25 22:09  | Sodium  | Completed           |
| 08/10/25 22:09  | Potassium   | Completed           |
| 24/09/25 14:55  | External Medical Report (s)                             |                     |
| 23/09/25 - Selected Visit Registration                |   |                     |
| 16/09/25 08:14  | Oncology RD Note (ecm)                                  |                     |
| 16/09/25 08:14  | Cardiology Fysicon Report (ecm)<br>Date: 09/09/25 10:00 |                     |
| 16/09/25 08:14  | ECG Report (s)<br>Date: 25/09/25 08:10                  |                     |
| 08/09/25 13:03  | Head/Cervical Spine MRI                                 | Signed              |

| Diagnostics   |   |           |                            |    | Activity Log |
|---|---|-----------|----------------------------|----|--------------|
| Selected Care Settings : All Time : All Subcategories |   |           |                            |    | Filter       |
| ACTIVITY DATE   | TYPE  | STATUS    | BY                         | Hx |              |
| 09/06/25 12:43  | Electrocardiogram   | Signed    | Mt,Meditech                |    |              |
| 09/06/25 12:42  | Ankle X-Ray   | Signed    | Mt,Meditech                |    |              |
| 09/06/25 12:26  | Cardiology Doctor Review                                    | Signed    | Template,Chief Med Officer |    |              |
| 09/06/25 12:22  | Cardiology Admission Clerking                               | Signed    | Template,Chief Med Officer |    |              |
| 22/05/25 12:10  | Medicine Admission Clerking<br>Service Date: 20/05/25 08:56 | Signed    | Template,Chief Med Officer |    |              |
| 20/05/25 11:23  | Chest X-Ray   | Signed    | Mt,Meditech                |    |              |
| 20/05/25 10:58  | ● Full Blood Count  | Completed |                            |    |              |
| 20/05/25 10:58  | Renal Profile (U&E)   | Completed |                            |    |              |
| 20/05/25 10:58  | ● C-Reactive Protein (Crp)                                  | Completed |                            |    |              |
| 07/05/25 16:26  | Abdomen MRI   | Signed    | Mt,Meditech                |    |              |
| 08/04/25 11:55  | Airway Management Plan<br>Service Date: 06/04/25 21:13      | Signed    | Doctor,Expanse2            |    |              |

| Diagnostics        | Provider Notes | Nurse/Allied Health | Medications    |
|--------------------|----------------|---------------------|----------------|
| History & Problems | Administrative | Other Clinical      | Workload Items |
| Summary            | Activity       | Flowsheets          | Health Mgmt    |

| Diagnostics   |   |           |                            |    | Activity Log |
|---|---|-----------|----------------------------|----|--------------|
| Selected Care Settings : All Time : All Subcategories |   |           |                            |    | Filter       |
| ACTIVITY DATE   | TYPE                                    | STATUS    | BY                         | Hx |              |
| 08/10/25 12:55  | Respiratory Admission Clerking          | Signed    | Kon,Onn (+)                |    |              |
| 07/10/25 08:42  | PICU Admission Clerking                 | Signed    | Template,Chief Med Officer |    |              |
| 01/10/25 08:19  | Haematology Oncology Admission Clerking | Signed    | Flynn,Michael John (+)     |    |              |
| 02/09/25 18:58  | ● Full Blood Count                      | Completed |                            |    |              |
| 02/09/25 18:47  | ● Full Blood Count                      | Completed |                            |    |              |
| 02/09/25 18:43  | ● Full Blood Count                      | Completed |                            |    |              |
| 17/07/25 09:56  | Antenatal Booking                       | Signed    | Consultant,Expanse 01      |    |              |
| 11/06/25 14:34  | Abdomen Ultrasound                      | Signed    | Mt,Meditech                |    |              |
| 23/05/25 09:25  | Obstetrics Postnatal Review             | Signed    | Template,Resident Doctor   |    |              |

- **White and grey shading** indicate normal results,
- **Yellow dots** represent abnormal values,
- **Red dots** represent critically abnormal results.
- **H and L** denote **High and Low** values.

Use the **left panel** to navigate between **Haematology, Coagulation, Chemistry, Toxicology, and Serology**.

For example: To review the results of a **Full Blood Count** - You can find the full blood count in the list under the **Diagnostics** tab, and by clicking on the **document icon**, the report will open.

| Diagnostics   |   |           |    |    | Activity Log |
|---|---|-----------|----|----|--------------|
| Selected Care Settings : All Time : All Subcategories |   |           |    |    | Filter       |
| ACTIVITY DATE   | TYPE  | STATUS    | BY | Hx |              |
| 09/06/25 13:10  | Magnesium   | Completed |    |    |              |
| 09/06/25 13:10  | Thyroid Profile   | Completed |    |    |              |
| 09/06/25 13:10  | Liver Function Test (Lft)                                   | Completed |    |    |              |
| 09/06/25 13:10  | C-Reactive Protein (Crp)                                    | Completed |    |    |              |
| 09/06/25 13:09  | Full Blood Count  | Completed |    |    |              |
| 09/06/25 12:43  | Electrocardiogram   | Signed    |    |    |              |
| 09/06/25 12:42  | Ankle X-Ray   | Signed    |    |    |              |
| 09/06/25 12:26  | Cardiology Doctor Review                                    | Signed    |    |    |              |
| 09/06/25 12:22  | Cardiology Admission Clerking                               | Signed    |    |    |              |
| 22/05/25 12:10  | Medicine Admission Clerking<br>Service Date: 20/05/25 08:56 | Signed    |    |    |              |
| 20/05/25 11:23  | Chest X-Ray   | Signed    |    |    |              |
| 20/05/25 10:58  | ● Full Blood Count  | Completed |    |    |              |

To review the results of any report, click on the **document icon**, which will open the report.

### Diagnostics Reports

TIME TEST:ABR18 (ABR18) 25 F 01/01/2000 Allergy/Adv: Penicillins, Fish oil, Other - latex

Q1 Biopsy Extra Pot

- Initial Concurrent Clinical Review (Signed) Template,Case Manager - 11/08/25
- Initial Concurrent Clinical Review (Signed) Template,Case Manager - 08/08/25
- Group And Screen (Results) 30/07/25
- Blood Bank Tests & Blood Product Summary Specimen (Results) 30/07/25
- Initial Concurrent Clinical Review (Signed) Isagholimen,Paul (+) - 25/07/25
- Initial Concurrent Clinical Review (Signed) Template,Case Manager - 08/07/25
- Initial Concurrent Clinical Review (Signed) Template,Case Manager - 08/07/25
- Initial Concurrent Clinical Review (Signed) Isagholimen,Paul - 08/07/25
- Group And Screen (Completed) 02/07/25
- Group And Screen (Results) 27/06/25
- Ysh (Completed) 26/06/25
- Group And Screen (Results) 26/06/25
- Blood Bank Tests & Blood Product Summary Specimen (Results) 26/06/25

Run Date: 22/10/25  
Run Time: 1727

PATIENT: DNE TEST,ABR18  
REG DR: Tarek El Shamy

ACCT: 000000213611 LOC: 0000001000  
AGE/SEX: 25/F ROOM: 1 JANAU REG: 02/05/25  
DOB: 03/03/2000 BED: A DES: 25/06/25  
STATUS: OIS IN TLOC:

SPEC #: 2006:00000048 COLL: 26/06/25-1156 STATUS: RES REQ #: 00000200  
RECD: 26/06/25-1156 SUBM DR: Gemma Pellis

ENTERED: 26/06/25-1157 OTHER DR:  
DND PRODS: RC\_ADULT  
DND TESTS: op & Screen, Crossmatch  
QUERIES: Special blood product requirement? None  
- None  
Date/Time product required? 26/06/25

**ADULT RED CELLS (220-100ml)**

| Unit #  | Bld Type            | Product | Status        | Date       | Issue Time User | Revd |
|---------|---------------------|---------|---------------|------------|-----------------|------|
| 4567890 | O Positive RC_ADULT | ISSUED  | 26/06/25 1200 | Z.LAB.BH58 |                 |      |

| Test                | Result                           | Flag | Reference |
|---------------------|----------------------------------|------|-----------|
| BLOOD BANK          |                                  |      |           |
| ABO Rh              | 0 Positive                       |      |           |
| Antibody Screen     | NEGATIVE                         |      |           |
| Crossmatch RC_ADULT | 4567890 O Positive Compatible? Y |      |           |

| TYPE                           | STATUS    |
|--------------------------------|-----------|
| Mammography Preliminary Report | Signed    |
| Radiology Report               | Draft     |
| Sodium                         | Completed |
| Potassium                      | Completed |

You can keep scrolling down the list of the report on the left to view other results.

### Diagnostics Reports

DNE TEST,ABBIE18 (ABBIE18) 25 F 03/03/2000 Allergy/Adv:

15/06/25

GI Biopsy Extra Pot

Initial Concurrent Clinical Review (Signed)  
Template,Case Manager - 11/08/25

Initial Concurrent Clinical Review (Signed)  
Template,Case Manager - 08/08/25

Group And Screen (Results)  
30/07/25

Blood Bank Tests & Blood Product Summary Specimen  
(Results)  
30/07/25

Initial Concurrent Clinical Review (Signed)  
Iseghohimen,Paul (+) - 25/07/25

Initial Concurrent Clinical Review (Signed)  
Template,Case Manager - 08/07/25

Initial Concurrent Clinical Review (Signed)  
Template,Case Manager - 08/07/25

Initial Concurrent Clinical Review (Signed)  
Iseghohimen,Paul - 08/07/25

**Filter**

**Hx**

Group And Screen (Results)  
26/06/25

Blood Bank Tests & Blood Product Summary Specimen  
(Results)  
26/06/25

|   |                                  |
|---|----------------------------------|
| <input checked="" type="checkbox"/> Inpatient       | <input type="radio"/> 3 Years    |
| <input checked="" type="checkbox"/> Hosp Outpatient | <input type="radio"/> 5 Years    |
|   | <input type="radio"/> Go to Date |

You can also **Filter** the **Diagnostics** to see  
**“Care Settings”, “Time Frame” &  
 “Subcategory”**

Activity Log

Filter

STATUS BY Hx

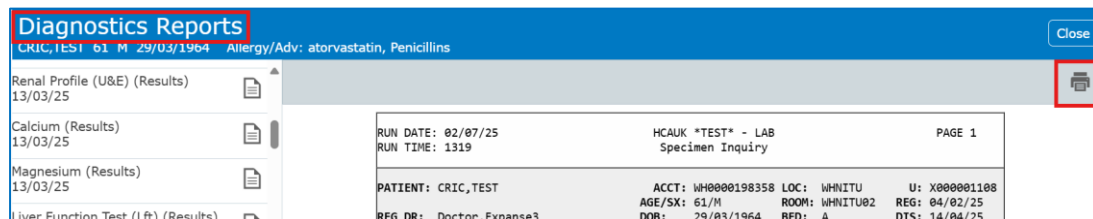
Cancel Apply

| SUBCATEGORY                                      | TYPE |
|--|------|
| <input checked="" type="checkbox"/> Select All   |      |
| <input checked="" type="checkbox"/> Departmental |      |
| <input checked="" type="checkbox"/> Imaging      |      |
| <input checked="" type="checkbox"/> Laboratory   |      |

Tick the options you desire under each section (**“Care Settings”, “Time Frame” &  
 “Subcategory”**) and then click **Apply**

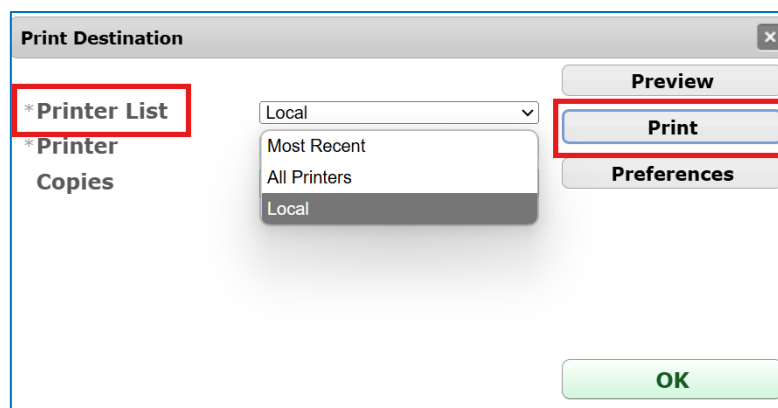
## How to Print & Download Diagnostic Reports

You can print the report using the Diagnostics Reports **overlay** by clicking the **Printer button** located at the top right corner of the window.



Now that the **Print Destination** window is displayed:


- **To print the document:**
  - Click the **print** button,
  - Then select the **desired printer**,
  - Click how many copies required
  - and **OK** to print the report.



- **To download the document (for it to be saved and then uploaded to a practice management system or emailed):**
  - You can click on **Preview**
  - Then **OK** to open a downloadable PDF



1 / 1
91%
🔍 🔄 📄 📁
📄 📁



1

RUN DATE: 22/10/25  
RUN TIME: 1739
HCAUK \*TEST\* - LAB  
Specimen Inquiry
PAGE 1

**PATIENT:** DNE TEST,ABBIE18  
**REG DR:** Tarek El Shamy

**ACCT:** WH0000213611  
**AGE/SX:** 25/F  
**DOB:** 03/03/2000  
**STATUS:** DIS IN

**LOC:** WHAAU  
**ROOM:** T.WHAAU  
**BED:** A  
**TLOC:**

**U:** X000001889  
**REG:** 02/05/25  
**DIS:** 29/06/25

**SPEC #:** 2606:BB00004R  
**ENTERED:** 26/06/25-1157  
**ORD PRODS:** RC\_ADULT  
**ORD TESTS:** Gp & Screen, Crossmatch  
**QUERIES:** Special blood product requirement? None  
                  . None  
                  Date/Time product required? 26/06/25

**COLL:** 26/06/25-1156  
**RECD:** 26/06/25-1156  
**OTHER DR:**

**STATUS:** RES  
**SUBM DR:** Gemma Melisi  
**REQ #:** 00006280

| ADULT RED CELLS (220-340mL) |            |          |        |          |                 |       |
|-----------------------------|------------|----------|--------|----------|-----------------|-------|
| Unit #                      | Bld Type   | Product  | Status | Date     | Issue Time User | Rervd |
| 4567890                     | O Positive | RC_ADULT | ISSUED | 26/06/25 | 1200 Z.LAB.BMSB |       |

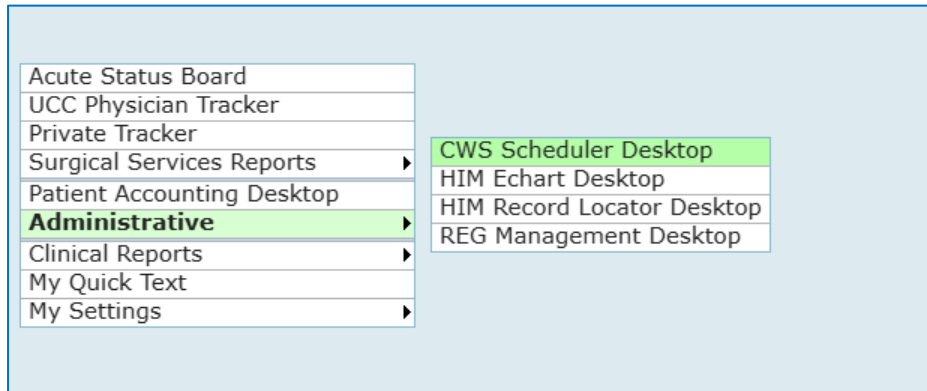
| Test            | Result     | Flag | Reference |
|-----------------|------------|------|-----------|
| BLOOD BANK      |            |      |           |
| ABO Rh          | O Positive |      |           |
| Antibody Screen | NEGATIVE   |      |           |

- Then a new box appears, where you can download using the save button in the top right hand-corner.

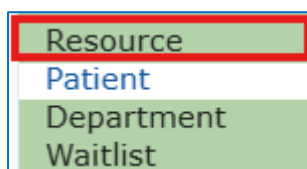
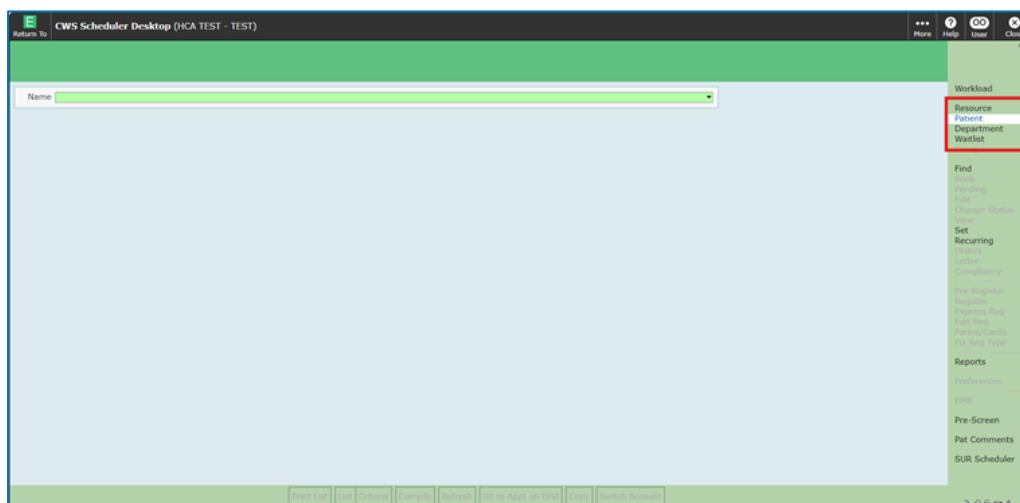


## Introduction to Resource Mode

To proceed with scheduling, go to the Main Menu, select **Administrative**, then choose **Community Wide Scheduling**, and finally click on **Scheduler Desktop**.



We've now arrived at the CWS scheduler desktop. On the Functions menu, it defaults to **"Patient"** mode, which lets you search for a specific patient and book the appointments through the patient but since you'll be looking at the consultant's diary, click on the **"Resource"** button



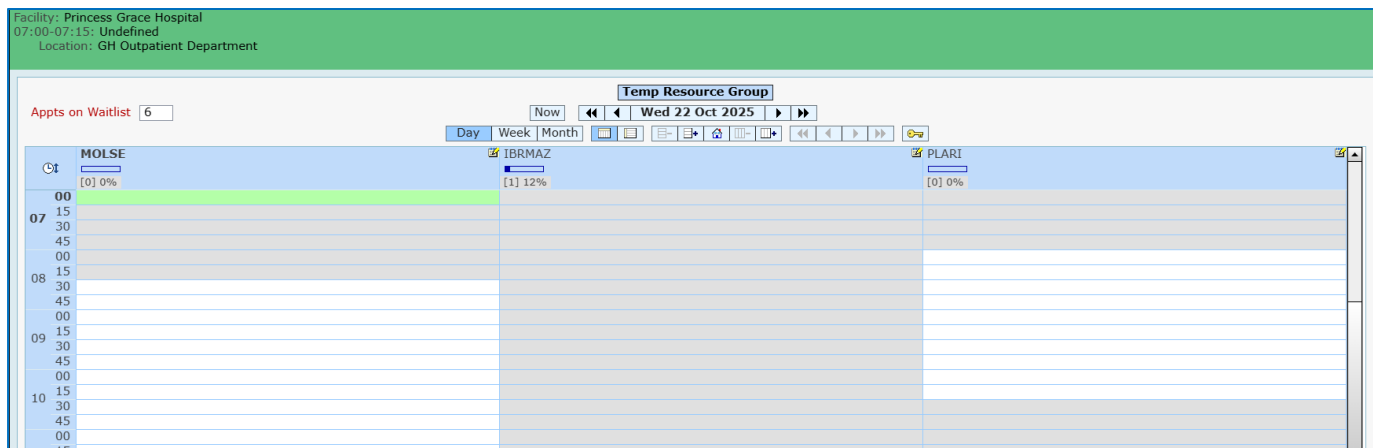
After selecting the **Resource function**, you'll be taken to the **Resource Group screen**. Currently, there isn't anything assigned to this user yet. Each user can customize and define what they would like to display.

For example, to find Sean Molloy in the **Resources box**, simply type **MOLSE** into the field and click **Enter** on your keyboard.

If you manage multiple consultants, you can add several consultants which will look as below:

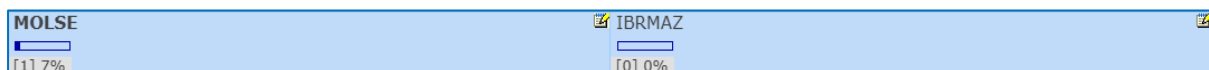
Click **OK**.

**This will take you automatically to the below screen**

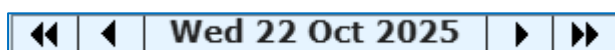


## Key Notes

- Grey shaded areas, are blocked areas and unable to be booked into (without editing the session, locally).
- White areas are the available slots that can be booked into.
- When looking after multiple consultants - The mnemonic that is **bold**, is the consultant that you are currently focused on



- > = the next day
- >> = the next week from the date you are on.
- < = the previous day
- << = the previous week from the date you are on.



## Understanding Resource Mode Details

Temp Resource Group

Now
◀◀ ◀ ▶ ▶▶
Wed 22 Oct 2025

Day
Week
Month

📅
📅
🏠
📅
📅

◀◀
◀
▶
▶▶
🔑

The above shows the date, and you can view the **diary** in either a **day, weekly or monthly** view.

Temp Resource Group

Appts on Waitlist 4
Now
◀◀ ◀ ▶ ▶▶
Sun 22 Jun 2025

Day
Week
Month

📅
📅
🏠
📅
📅

◀◀
◀
▶
▶▶
🔑

🕒
Molloy,S
📅

[0] 0%

|       |  |
|-------|--|
| 00    |  |
| 07 15 |  |
| 30    |  |
| 45    |  |
| 00    |  |
| 08 15 |  |
| 30    |  |
| 45    |  |
| 00    |  |
| 09 15 |  |
| 30    |  |
| 45    |  |
| 00    |  |
| 10 15 |  |
| 30    |  |
| 45    |  |
| 00    |  |
| 11 15 |  |
| 30    |  |
| 45    |  |
| 00    |  |
| 12 15 |  |
| 30    |  |
| 45    |  |
| 00    |  |
| 13 15 |  |
| 30    |  |
| 45    |  |
| 14 00 |  |

### Day View

Temp Resource Group

Appts on Waitlist 4
Now
◀◀ ◀ ▶ ▶▶
Sun 22 Jun 2025

Day
Week
Month

📅
📅
🏠
📅
📅

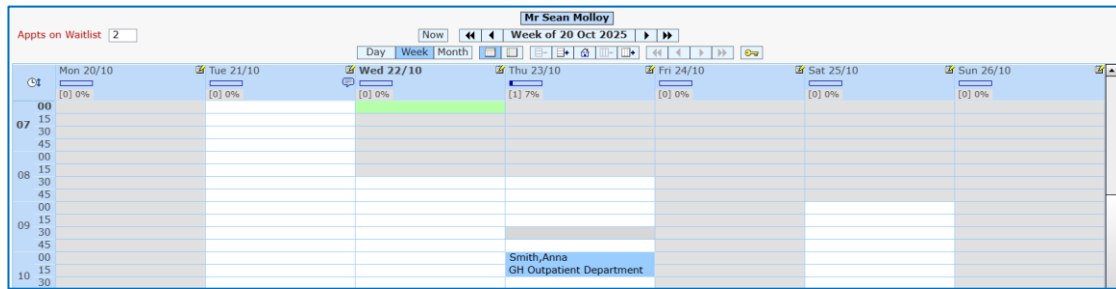
◀◀
◀
▶
▶▶
🔑

🕒
Molloy,S
📅

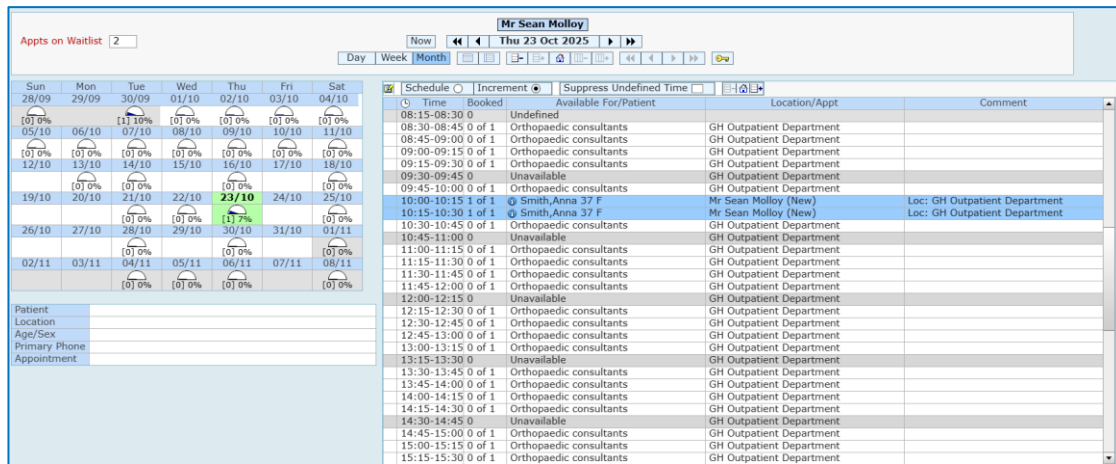
[0] 0%

|       |  |
|-------|--|
| 00    |  |
| 07 15 |  |
| 30    |  |
| 45    |  |
| 00    |  |
| 08 15 |  |
| 30    |  |
| 45    |  |

## Week View



**Month View** - Within the Month view, you'll see the percentage of the day that is filled.

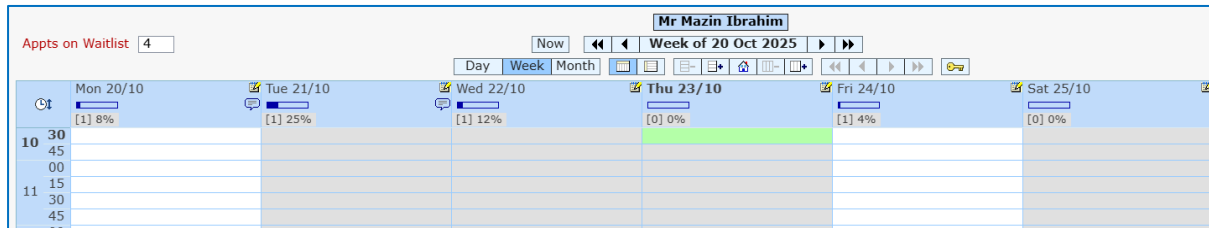


you can also see the list of available times and any booked appointments.

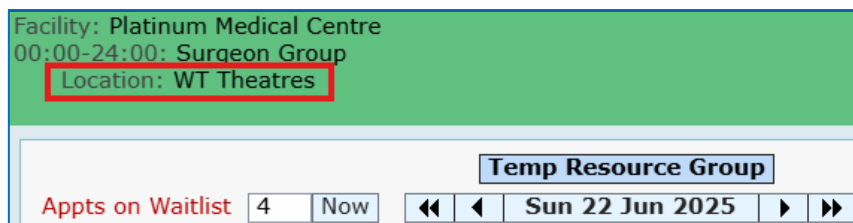
| Time               | Booked | Available For/Patient       | Location/Appt            | Comment                       |
|--------------------|--------|-----------------------------|--------------------------|-------------------------------|
| 10:30-10:45 0 of 1 |        | Orthopaedic consultants     | GD Outpatient Department |                               |
| 10:45-11:00 0 of 1 |        | Orthopaedic consultants     | GD Outpatient Department |                               |
| 11:00-11:15 0 of 1 |        | Orthopaedic consultants     | GD Outpatient Department |                               |
| 11:15-11:30 0 of 1 |        | Orthopaedic consultants     | GD Outpatient Department |                               |
| 11:30-11:45 0 of 1 |        | Orthopaedic consultants     | GD Outpatient Department |                               |
| 11:45-12:00 0 of 1 |        | Orthopaedic consultants     | GD Outpatient Department |                               |
| 12:00-12:15 0 of 1 |        | Orthopaedic consultants     | GD Outpatient Department |                               |
| 12:15-12:30 0 of 1 |        | Orthopaedic consultants     | GD Outpatient Department |                               |
| 12:30-12:45 0 of 1 |        | Orthopaedic consultants     | GD Outpatient Department |                               |
| 12:45-13:00 0 of 1 |        | Orthopaedic consultants     | GD Outpatient Department |                               |
| 13:00-13:15 0 of 1 |        | Orthopaedic consultants     | GD Outpatient Department |                               |
| 13:15-13:30 0 of 1 |        | Orthopaedic consultants     | GD Outpatient Department |                               |
| 13:30-13:45 0 of 1 |        | Orthopaedic consultants     | GD Outpatient Department |                               |
| 13:45-14:00 0 of 1 |        | Orthopaedic consultants     | GD Outpatient Department |                               |
| 14:00-14:15 1 of 1 |        | TrainMedSec18,MedSec18 34 M | Mr Mazin Ibrahim (New)   | Loc: GD Outpatient Department |
| 14:15-14:30 1 of 1 |        | TrainMedSec18,MedSec18 34 M | Mr Mazin Ibrahim (New)   | Loc: GD Outpatient Department |
| 14:30-14:45 1 of 1 |        | TrainMedSec18,MedSec18 34 M | Mr Mazin Ibrahim (New)   | Loc: GD Outpatient Department |
| 14:45-15:00 0 of 1 |        | Orthopaedic consultants     | GD Outpatient Department |                               |
| 15:00-15:15 0 of 1 |        | Orthopaedic consultants     | GD Outpatient Department |                               |
| 15:15-15:30 0 of 1 |        | Orthopaedic consultants     | GD Outpatient Department |                               |
| 15:30-15:45 0 of 1 |        | Orthopaedic consultants     | GD Outpatient Department |                               |

If you look after multiple consultants, you can only view one consultant at a time on the “**Week**” or “**Month**” view. To view the other consultants, you will need to:

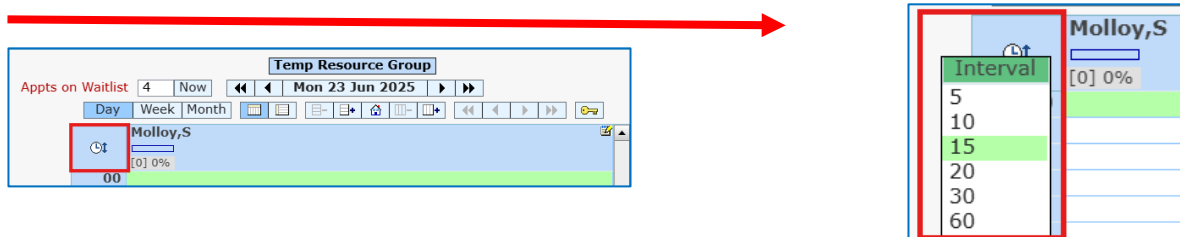
- Click back on view “**day**” view
- Then click the other consultant (either on their mnemonic or in the diary for that consultant) ensuring the focus changes to the other consultant.
- Then you can click the “**Week**” or “**Month**” view for that consultant.



From the diary, we can also see which **facility** the doctor will be at – **at the top left of the screen.**



You can filter the schedule to show appointments at specific intervals, such as every 15 minutes - By clicking on the **clock with the up and down arrow** on the left side of the schedule.



- NB. Viewing the appointments in intervals of “5 minutes” will allow you to see all the patient details that have been booked into the diary

Temp Resource Group

Appts on Waitlist 6

Now Mon 20 Oct 2025

Day Week Month

MOLSE [0] 0%

IBRMAZ [1] 8%

30 35 40 45 50 55 00 05 10 15 20 25 30 35 40 45 50 55 00 05 10 15 20 25 30 35

TrainMedSec18, MedSec18  
GD Outpatient Department  
34 M  
9123456806  
Mr Mazin Ibrahim (New)

On the main resource mode, you will have a key icon – which will identify the colour and icon keys – including their meanings:

Key

Icon Key

- Waitlisted Appointments
- Do Not Move Case
- Move Case Up
- Move Case Down
- Edit Resource Schedule
- View Resource Schedule
- Resources Overbooked
- Resource Comment
- Change Time Increment
- Special Indicators
- [V] View Only
- Meetings
- Requested via Health Portal
- Booked via Health Portal
- Health Portal - Requires Verification
- Health Portal Appointment Verified
- Exclusive Appointment
- Multiple Appointments
- More Information about Patient

Color Key

- Available
- Undefined Time
- Available Capacity Not Met
- Unavailable
- Appointment
- Restricted Appointment
- Meeting
- Overbook
- Block Time
- Available for other Resource Groups or Locations

Close

Temp Resource Group

Now Wed 22 Oct 2025

Day Week Month



## How to Open An Adhoc Clinic Session

Looking at the below diary, the shaded grey section for the mnemonic “**MOLSE**” shows the appointments are unavailable to be booked into:

To open the diary, click on the **pen and notebook icon**, in the top right-hand corner of the day you want to edit.

This will open the **Edit Resource Schedule window**.

To complete any local edit, it is compulsory that a reason is entered into the **Day Schedule Comment** field.

Click the **LookUp** arrow to input the data – Administration.

[Comments](#) | [Schedule](#) | [Block Time](#)

**Day Comments for Molloy,Sean - 23/06/2025**

Last Edit By: Background Daemon 06/06/25 07:47:10

\* Day Schedule Comment

| Reason Lookup                 |            |
|-------------------------------|------------|
| Search <input type="text"/>   |            |
| Name                          | Mnemonic   |
| Additional Clinic List        | 1ADD       |
| Administration                | 1ADMIN     |
| Alter Clinic Time             | 1ALI       |
| Annual Leave                  | 1AL        |
| Book slots first to last      | 1BOOKFIRST |
| Book slots last to first      | 1BOOKLAST  |
| Break/Lunch                   | 1BREAK     |
| Call Imaging before booking   | 1IDMBEFORE |
| Call Sec after booking        | 1SECAFTER  |
| Clinic Cancelled              | 1CCANX     |
| Equipment failure/unavailable | 1EQF       |
| Equipment/Room Service        | 1SER       |
| Meeting                       | 1MEETING   |
| Message for clinician         | 1SCHCONT   |
| No gaps in Clinic             | 1NOGAP     |
| Reserved Slot                 | 1RESV      |
| Resource Sick                 | 1SICK      |
| Sec books only                | 1SECBOOKS  |
| Theatre Session               | 1THEATRE   |
| Training/Study Leave          | 1TRAIN     |

Next, select the **Schedule** tab.

[Comments](#) | [Schedule](#) | [Block Time](#)

**Day Comments for Molloy,Sean - 23/06/2025**

Last Edit By: Background Daemon 06/06/25 07:47:10

\* Day Schedule Comment

Additional Text

In the **Edit Resource Schedule** window, you can view the resource's details.  
Additionally, there is the second grid that requires the availability information.

|          |              |
|----------|--------------|
| Resource | ACY8060      |
| Name     | Molloy, Sean |
| Date     | 23/06/25     |
| Monogram | Molloy, S    |

| * Unavailable/Available | * Start Time | * End Time | * Book Factor | * Facility              |
|-------------------------|--------------|------------|---------------|-------------------------|
| Available               | 00:00        | 24:00      | 1             | Platinum Medical Centre |
|                         |              |            |               |                         |
|                         |              |            |               |                         |
|                         |              |            |               |                         |

+ - < > X

Resource Group

Surgeon Group

Location

WT Theatres

Schedule Comment

Additional Text

- **Within the first category: Unavailable/Available field;** Use the **Lookup** arrow to choose the "Available" option.

\* Unavailable/Available

Available

Available

Unavailable

- **Start Time field;** Use the **LookUp** arrow to open the Time grille - You can now enter the time using the **24-hour format** and click **OK**.

Time

| Hour | Min |
|------|-----|
| 00   | 13  |
| 01   | 14  |
| 02   | 15  |
| 03   | 16  |
| 04   | 17  |
| 05   | 18  |
| 06   | 19  |
| 07   | 20  |
| 08   | 21  |
| 09   | 22  |
| 10   | 23  |
| 11   | 24  |
| 12   |     |

\*Time 09:00

Cancel OK

- **End Time field;** Use the **LookUp** arrow to open the Time grille - You can now enter the time using the **24-hour format** and click **OK**.

**Time**

| Hour | Min |
|------|-----|
| 00   | 13  |
| 01   | 14  |
| 02   | 15  |
| 03   | 16  |
| 04   | 17  |
| 05   | 18  |
| 06   | 19  |
| 07   | 20  |
| 08   | 21  |
| 09   | 22  |
| 10   | 23  |
| 11   | 24  |
| 12   |     |

\*Time 17:00

Cancel OK

**Note:** Book Factor is the number of appointments that can be booked per slot.

**Book factor field;** Use the **LookUp** arrow to open the **Keypad/ Calculator** grid – Enter **1** and click **OK**.

\* Book Factor

1

Keypad / Calculator

Backspace Clear

|   |   |   |
|---|---|---|
| 7 | 8 | 9 |
| 4 | 5 | 6 |
| 1 | 2 | 3 |
| 0 |   |   |

Keypad Calculator Cancel OK

**Facility field;** Use the **LookUp** arrow to open the **Facility LookUp** window and select the appropriate Facility.

| Name                           | Mnemonic | Him Dept | Acct # Prefix |
|--------------------------------|----------|----------|---------------|
| 30 Devonshire Street           | COCGD    | UKHIM    | GD            |
| 272 Kings Road Diag & Otpts    | COCTK    | UKHIM    | TK            |
| Battersea & Nine Elms Otpts    | COCTE    | UKHIM    | TE            |
| Beaufort House Outpatients     | COCWB    | UKHIM    | WB            |
| Canary Wharf Diag & Otpts      | COCCW    | UKHIM    | CW            |
| Chelsea Outpatients Centre     | COCCD    | UKHIM    | LC            |
| Chiswick Diagnostic Centre     | COCTC    | UKHIM    | TC            |
| Endoscopy @ Wellington         | COCWE    | UKHIM    | WE            |
| Endoscopy at London Bridge     | COCEE    | UKHIM    | EE            |
| Endoscopy at Princess Grace    | COGGE    | UKHIM    | GE            |
| Harley Street Clinic           | COCHS    | UKHIM    | HS            |
| HSC @ Devonshire Outpatients   | COCHV    | UKHIM    | HV            |
| Inst of Sports & Exercise Hlth | COHGS    | UKHIM    | GS            |

In this example, we would select the below facility:

| Name                        | Mnemonic | Him Dept | Acct # Prefix |
|-----------------------------|----------|----------|---------------|
| 30 Devonshire Street        | COCGD    | UKHIM    | GD            |
| 272 Kings Road Diag & Otpts | COCTK    | UKHIM    | TK            |
| Battersea & Nine Elms Otpts | COCTE    | UKHIM    | TE            |

Next, you will need to confirm **Resource Group** field;

|          |                |  |  |  |
|----------|----------------|--|--|--|
| Resource | ACY8060        |  |  |  |
| Name     | Mr Sean Molloy |  |  |  |
| Date     | 20/10/25       |  |  |  |
| Monogram | MOLSE          |  |  |  |

| * Unavailable/Available | * Start Time | * End Time | * Book Factor | * Facility           |
|-------------------------|--------------|------------|---------------|----------------------|
| Available               | 09:00        | 17:00      | 1             | 30 Devonshire Street |
|                         |              |            |               |                      |
|                         |              |            |               |                      |
|                         |              |            |               |                      |
|                         |              |            |               |                      |

\* Resource Group

Select the **Lookup** arrow, to open the **Resource Lookup**, then Fill in the **Resource** field as required: (in this example, it would be “**Orthopaedic Consultants**”)

| <input checked="" type="checkbox"/> | Name                    | Mnemonic |
|-------------------------------------|-------------------------|----------|
| <input type="checkbox"/>            | Orthopaedic consultants | 1ORTHO   |

|          |                |  |  |  |
|----------|----------------|--|--|--|
| Resource | ACY8060        |  |  |  |
| Name     | Mr Sean Molloy |  |  |  |
| Date     | 20/10/25       |  |  |  |
| Monogram | MOLSE          |  |  |  |

| * Unavailable/Available | * Start Time | * End Time | * Book Factor | * Facility           |
|-------------------------|--------------|------------|---------------|----------------------|
| Available               | 09:00        | 17:00      | 1             | 30 Devonshire Street |
|                         |              |            |               |                      |
|                         |              |            |               |                      |
|                         |              |            |               |                      |
|                         |              |            |               |                      |

Resource Group

\* Location

Next, Use the **Lookup** arrow, to open the **Location Lookup**, to choose the **location**.

|          |                |  |  |  |  |
|----------|----------------|--|--|--|--|
| Resource | ACY8060        |  |  |  |  |
| Name     | Mr Sean Molloy |  |  |  |  |
| Date     | 20/10/25       |  |  |  |  |
| Monogram | MOLSE          |  |  |  |  |

| * Unavailable/Available | * Start Time | * End Time | * Book Factor | * Facility           |
|-------------------------|--------------|------------|---------------|----------------------|
| Available               | 09:00        | 17:00      | 1             | 30 Devonshire Street |
|                         |              |            |               |                      |
|                         |              |            |               |                      |
|                         |              |            |               |                      |

Resource Group

Orthopaedic consultants

\* Location

GD Outpatient Department

GD Orthopaedics

+

x

Schedule Comment

Additional Text

\* Location

GD Outpatient Department

+

x

Click **Save**.

Cancel

Save

The schedule is now available.

Appts on Waitlist 6

Now Mon 20 Oct 2025

Day Week Month

IBRMAZ

0% 8%

30

35

40

45

50

55

00

05

10

15

20

25

30

35

40

45

50

55

00

05

10

15

20

25

30

35

TrainMedSec18, MedSec18

GD Outpatient Department

34 M

9123456806

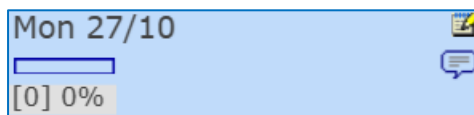
Mr Mazin Ibrahim (New)

| Temp Resource Group |        |                          |        |
|---------------------|--------|--------------------------|--------|
| Apts on Waitlist 6  |        | Now Mon 20 Oct 2025      |        |
| Day Week Month      |        |                          |        |
| ⌚                   | MOLSE  | IBRMAZ                   | PLARI  |
|                     | [0] 0% | [1] 8%                   | [0] 0% |
| 08 45               |        |                          |        |
| 09 00               |        |                          |        |
| 09 15               |        |                          |        |
| 09 30               |        |                          |        |
| 09 45               |        |                          |        |
| 10 00               |        |                          |        |
| 10 15               |        |                          |        |
| 10 30               |        |                          |        |
| 10 45               |        |                          |        |
| 11 00               |        |                          |        |
| 11 15               |        |                          |        |
| 11 30               |        |                          |        |
| 11 45               |        |                          |        |
| 12 00               |        |                          |        |
| 12 15               |        |                          |        |
| 12 30               |        |                          |        |
| 12 45               |        |                          |        |
| 13 00               |        |                          |        |
| 13 15               |        |                          |        |
| 13 30               |        |                          |        |
| 13 45               |        |                          |        |
| 14 00               |        | TrainMedSec18,MedSec18   |        |
| 14 15               |        | GD Outpatient Department |        |
| 14 30               |        | 34 M                     |        |
| 14 45               |        |                          |        |
| 15 00               |        |                          |        |
| 15 15               |        |                          |        |
| 15 30               |        |                          |        |
| 15 45               |        |                          |        |
| 16 00               |        |                          |        |
| 16 15               |        |                          |        |

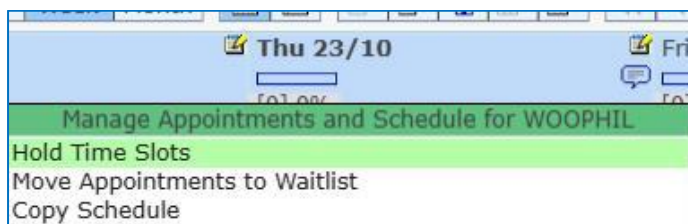
**NB: This is an example of an ad-hoc diary change, permanent changes will need to continue to be raised by Service Now tickets or via the Contact Centre Team.**

## How to Copy a Clinic Schedule to Another Day

If you need would like to copy a clinic schedule to another day **right-click** on the percentage below the date or (consultant name when you look after multiple consultants)



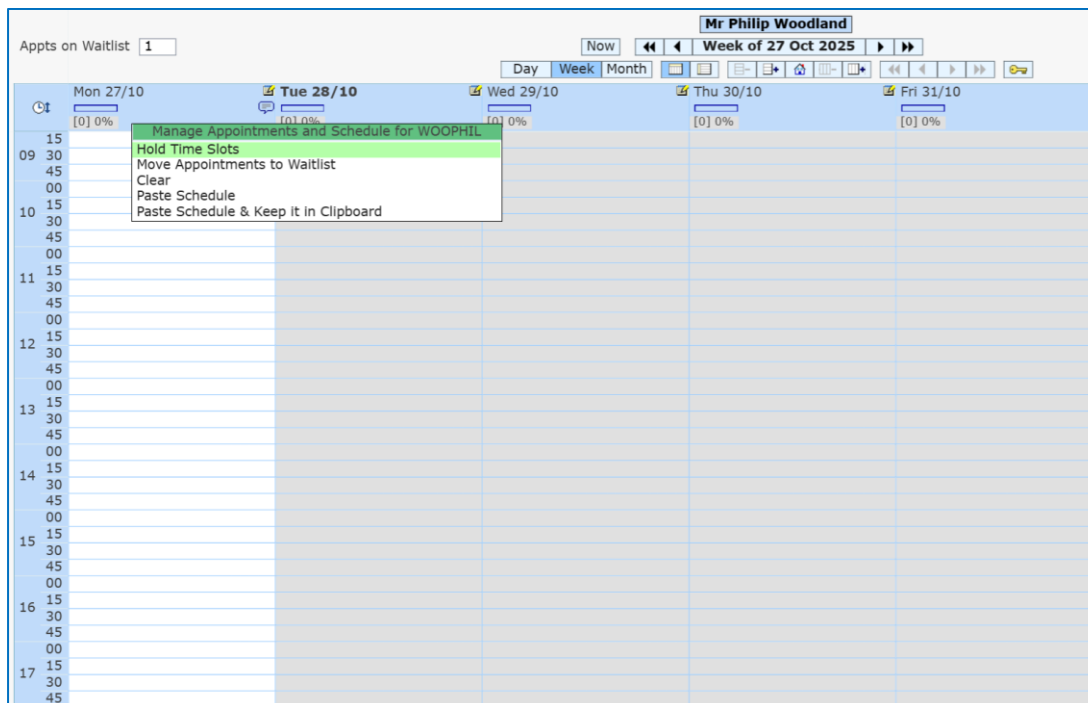
This will bring up the below box:



Click **Copy Schedule**

Then **Right click** on the **percentage** of the **next date**, you want to **Paste Schedule** to.

If you want to **Paste the Schedule** to **multiple days**, Click **Paste Schedule & Keep it in Clipboard**. You will need to keep selecting **Paste Schedule & Keep it in Clipboard** for multiple uses. **Paste Schedule** will only work once.





You can see that we have now copied the schedule to “Tuesday” in the below:

| Day   | Mon 27/10 | Tue 28/10 | Wed 29/10 | Thu 30/10 | Fri 31/10 |
|-------|-----------|-----------|-----------|-----------|-----------|
| 09:30 | [0] 0%    | [0] 0%    | [0] 0%    | [0] 0%    | [0] 0%    |
| 10:00 |           |           |           |           |           |
| 10:30 |           |           |           |           |           |
| 11:00 |           |           |           |           |           |
| 11:30 |           |           |           |           |           |
| 12:00 |           |           |           |           |           |
| 12:30 |           |           |           |           |           |
| 13:00 |           |           |           |           |           |
| 13:30 |           |           |           |           |           |
| 14:00 |           |           |           |           |           |
| 14:30 |           |           |           |           |           |
| 15:00 |           |           |           |           |           |
| 15:30 |           |           |           |           |           |
| 16:00 |           |           |           |           |           |
| 16:30 |           |           |           |           |           |
| 17:00 |           |           |           |           |           |
| 17:30 |           |           |           |           |           |
| 17:45 |           |           |           |           |           |

You can see now that the schedule has also been copied to “Wednesday”.

However, if for example this was done in error – you can right click on the **Percentage** and click **Restore Schedule**. This will take the schedule back to what it was previously

| Day   | Mon 27/10 | Tue 28/10 | Wed 29/10 | Thu 30/10 | Fri 31/10 |
|-------|-----------|-----------|-----------|-----------|-----------|
| 09:30 | [0] 0%    | [0] 0%    | [0] 0%    | [0] 0%    | [0] 0%    |
| 10:00 |           |           |           |           |           |
| 10:30 |           |           |           |           |           |
| 11:00 |           |           |           |           |           |
| 11:30 |           |           |           |           |           |
| 12:00 |           |           |           |           |           |
| 12:30 |           |           |           |           |           |
| 13:00 |           |           |           |           |           |
| 13:30 |           |           |           |           |           |
| 14:00 |           |           |           |           |           |
| 14:30 |           |           |           |           |           |
| 15:00 |           |           |           |           |           |
| 15:30 |           |           |           |           |           |
| 16:00 |           |           |           |           |           |
| 16:30 |           |           |           |           |           |
| 17:00 |           |           |           |           |           |
| 17:30 |           |           |           |           |           |
| 17:45 |           |           |           |           |           |

Next you will see the below; to **undo the schedule paste**, you will need to **enter a Day Schedule Comment**

**Click**, the **Lookup Arrow Function**, to select a **mandatory comment** and then you can enter **additional free type text** for any further information.

**Day Comments for Mr Philip Woodland - 29/10/2025**  
**Edit Resource Schedule Routine**  
 Last Edit By: Young-Rodriquez,Aaliyah 23/10/25 17:36:37

\* Day Schedule Comment

Additional Text

**Day Comments for Mr Philip Woodland - 29/10/2025**  
**Edit Resource Schedule Routine**  
 Last Edit By: Young-Rodriquez,Aaliyah 23/10/25 17:36:37

\* Day Schedule Comment

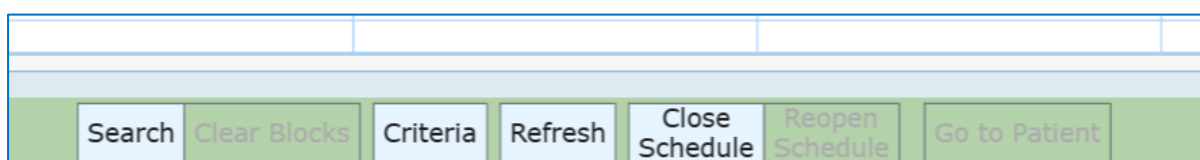
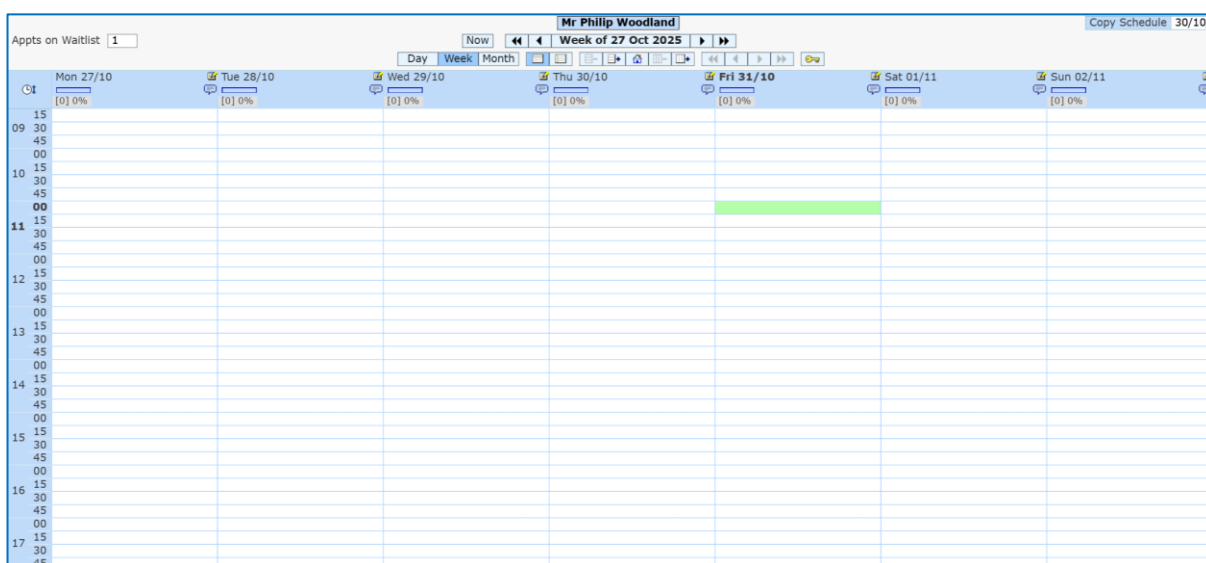
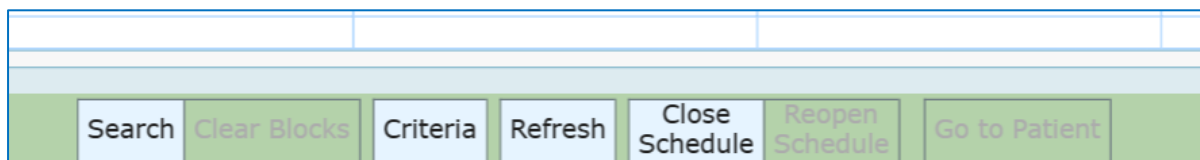
Administration

Additional Text

Error

## How to Close & Reopen a Clinic Schedule / Clinic Session

To **Close** a schedule, you will see a **Close Schedule** button at the bottom of your screen when in **Resource Mode** on your calendar, for your consultant.



Click the day that you want to close, so there is a green bar in the day. Then click **Close Schedule**.

Next you will see the below, where you will need to **enter** a **Day Schedule Comment**

Day Comments for Mr Philip Woodland - 31/10/2025  
Close Schedule Routine

Day Comments for Mr Philip Woodland - 31/10/2025  
Close Schedule Routine

\* Day Schedule Comment

Annual Leave

Additional Text

You can see that the Friday session 31<sup>st</sup> October 2025, is now closed.

If for any reason your consultant changed their mind and was no longer going to be unavailable. Select the day of the clinic and you can **Reopen Schedule**, in the same place **Close Schedule** usually is.

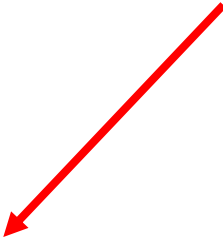
To complete this process, you will need to enter a **Day Schedule Comment**.

## How to Block Time During A

### Clinic Session

If you need to **block out a slot** for a meeting, lunch, or any other reason, you can do so by clicking the **pen and notebook icon** and then selecting "**Schedule**" from the **Edit Resource Schedule** window.

Click the **LookUp** arrow to input the data – Administration.



Comments Schedule Block Time

**Day Comments for Molloy,Sean - 23/06/2025**

Last Edit By: Background Daemon 06/06/25 07:47:10

\* Day Schedule Comment

Reason Lookup

Search 

| Name                          | Mnemonic   |
|-------------------------------|------------|
| Additional Clinic List        | 1ADD       |
| Administration                | 1ADMIN     |
| Alter Clinic Time             | 1ALI       |
| Annual Leave                  | 1AL        |
| Book slots first to last      | 1BOOKFIRST |
| Book slots last to first      | 1BOOKLAST  |
| Break/Lunch                   | 1BREAK     |
| Call Imaging before booking   | 1IDMBEFORE |
| Call Sec after booking        | 1SECAFTER  |
| Clinic Cancelled              | 1CCANX     |
| Equipment failure/unavailable | 1EQF       |
| Equipment/Room Service        | 1SER       |
| Meeting                       | 1MEETING   |
| Message for clinician         | 1SCHCONT   |
| No gaps in Clinic             | 1NOGAP     |
| Reserved Slot                 | 1RESV      |
| Resource Sick                 | 1SICK      |
| Sec books only                | 1SECBOOKS  |
| Theatre Session               | 1THEATRE   |
| Training/Study Leave          | 1TRAIN     |

Next, select the **Schedule** tab.

Comments **Schedule** Block Time

**Day Comments for Molloy,Sean - 23/06/2025**

Last Edit By: Background Daemon 06/06/25 07:47:10

\* Day Schedule Comment

Additional Text

Comments **Schedule** Block Time

**Day Comments for Molloy,Sean - 23/06/2025**

In the **Edit Resource Schedule** window, you can view the resource's details.

Additionally, the second grid requires the un-availability information:

Complete the fields in the same way we did for the schedule opening.

- **Unavailable/ Available:** Unavailable.
- **Start Time:** 13:00.
- **End Time:** 14:00.
- **Facility:** 30 Devonshire Street.

**NB. Further comments can be added to the blocked hour to give indication as to the reason for the block.**

Comments
Schedule
Block Time

Resource: ACY8060  
Name: Mr Sean Molloy  
Date: 20/10/25  
Monogram: MOLSE

| * Unavailable/Available | * Start Time | * End Time | Book Factor | * Facility           |
|-------------------------|--------------|------------|-------------|----------------------|
| Available               | 09:00        | 17:00      | 1           | 30 Devonshire Street |
| Unavailable             | 13:00        | 15:00      | 0           | 30 Devonshire Street |
|                         |              |            |             |                      |
|                         |              |            |             |                      |

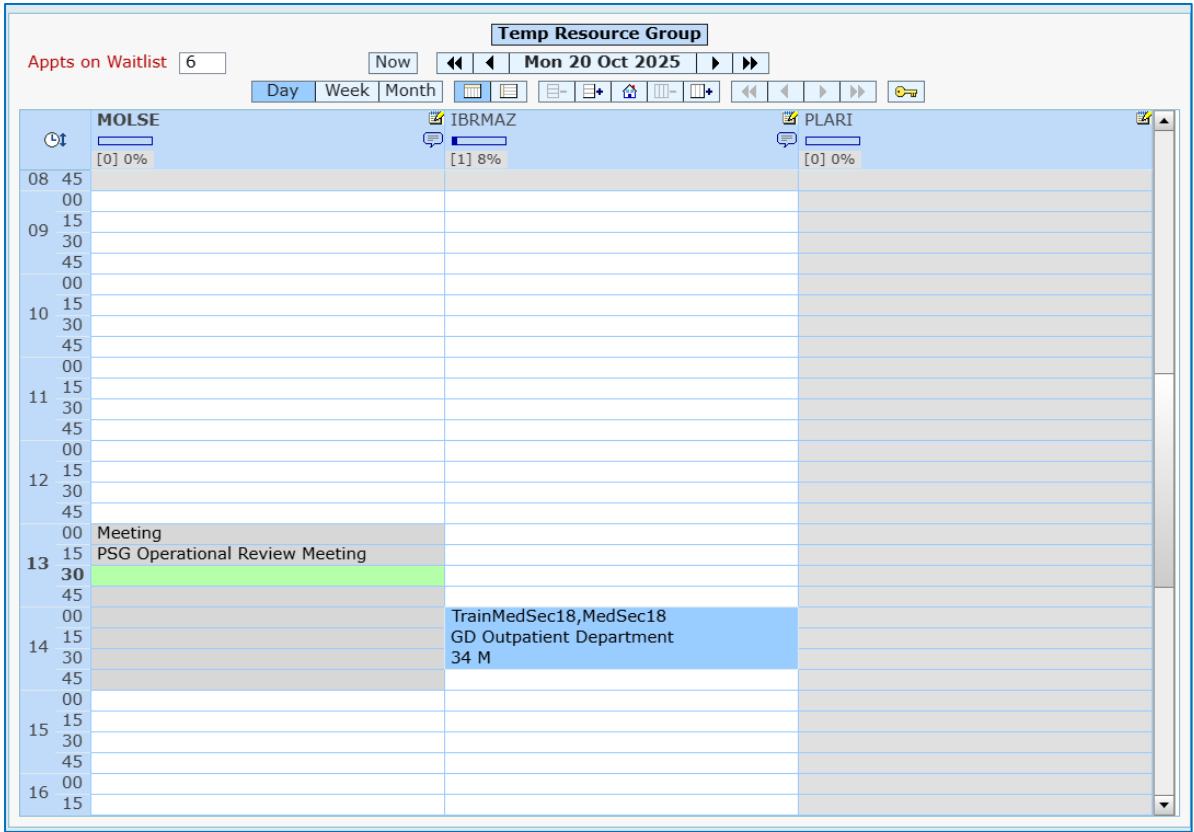
Resource Group

Schedule Comment: Meeting  
Additional Text: PSG Operational Review Meeting

Click **Save**.

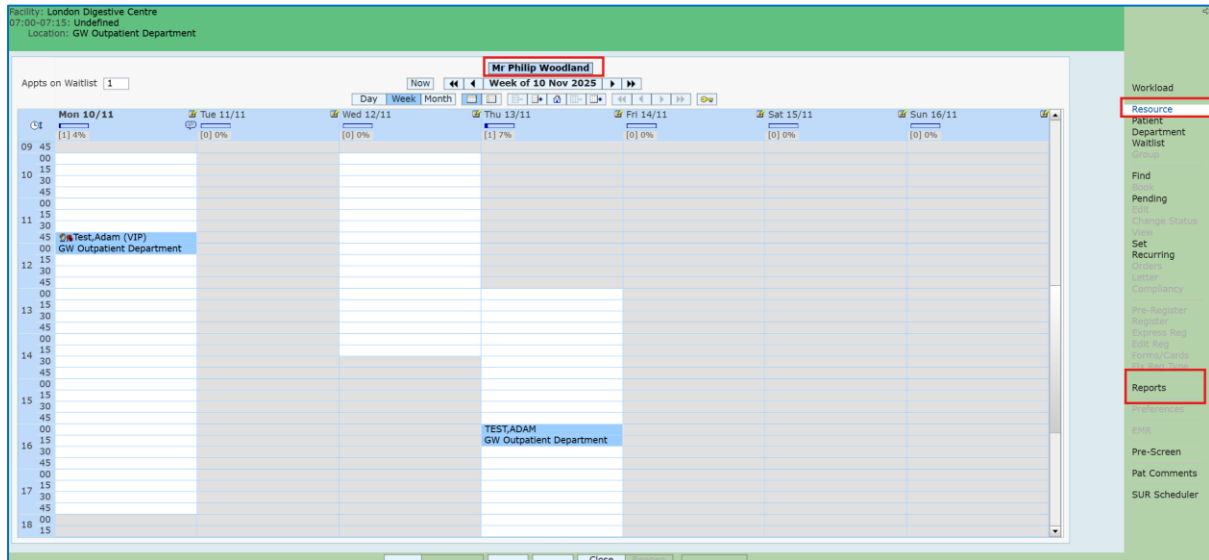
Cancel
Save

You can now see the blocked time.



## How to Print & Download Clinic Lists

If you need to print your clinic list, you can do so by clicking **Reports** when in **Resource** and you are **viewing your consultant Diary**.



Click on **Daily Appointment Schedule**

You will then see the below screen, where several fields will need to be entered

- Select **Resource** from the **List By:** Section

- Enter your

consultant's mnemonic in the resource section



| * Resource         |
|--------------------|
| Mr Philip Woodland |
|                    |
|                    |

- Enter the **dates you require** as appropriate from the **Restrict To** Section

| Restrict to: |          |
|--------------|----------|
| * From Date  | 13/11/25 |
| * Thru Date  | 13/11/25 |

- Select the **appointment Statuses** you need i.e. **Booked** to view all currently booked

appointments.

| Appointment Statuses                       |                                    |                                       |
|--|------------------------------------|---------------------------------------|
| <input checked="" type="checkbox"/> Booked | <input type="checkbox"/> Cancelled | <input type="checkbox"/> Discontinued |
| <input type="checkbox"/> Attended          | <input type="checkbox"/> No Show   | <input type="checkbox"/> Waitlisted   |

- Select **how** you would like to view the printout or download by clicking on the **sort**

by section.

| Sort by:   |  |
|------------|--|
| Sort Order | <input type="radio"/> Alphabetical <input checked="" type="radio"/> Chronological <input type="radio"/> Status <input type="radio"/> Medical Record Number |

- You can select how you would like each appointment to appear on the download or print out E.g: **Include Questions, Include reason for Visit, Include Orders, Include Comments** etc.

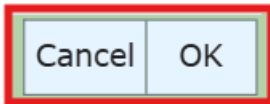
Expanse will by default select all these as NO, however you can change this as required.

| For each patient:   | Report Layout  |
|---|--|
| Include Confidential Patients <input type="radio"/> Yes <input type="radio"/> No<br>Include Allergies <input type="radio"/> Yes <input checked="" type="radio"/> No | * Report Orientation <input type="radio"/> Portrait <input checked="" type="radio"/> Landscape<br>Page Break on Resource <input type="radio"/> Yes <input checked="" type="radio"/> No<br>Page Break on Date <input type="radio"/> Yes <input checked="" type="radio"/> No |

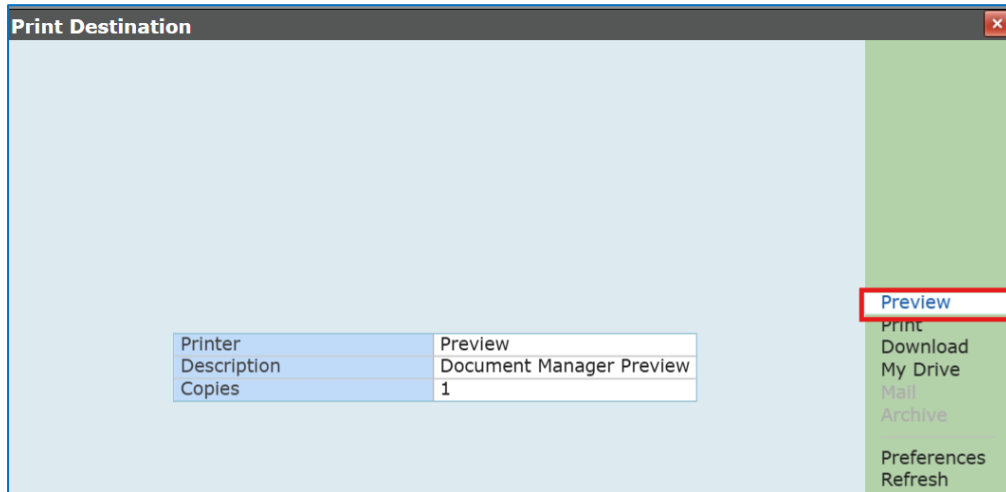
**N.B** If you are printing multiple dates, you may want to have a **Page Break**, so that the new date starts on a new page.

If you are printing multiple consultants, you may want to have a **Page Break** on **both Resource and Date** so that for each consultant, the new date starts on a new page.

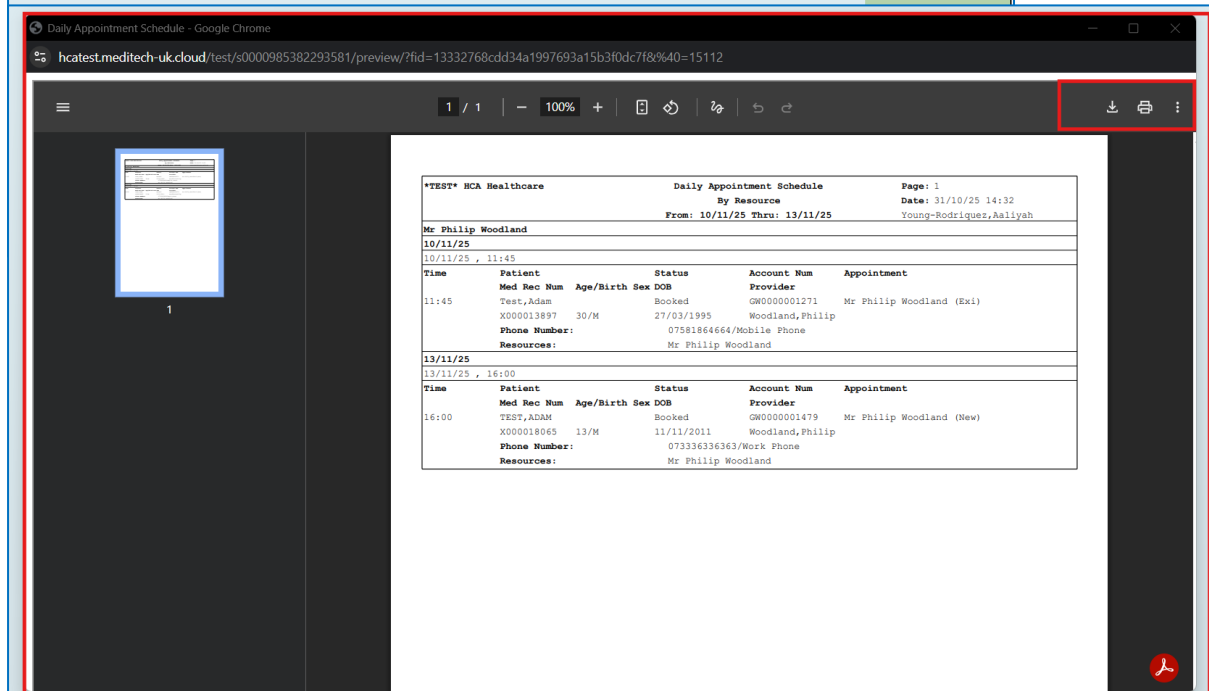
Select OK



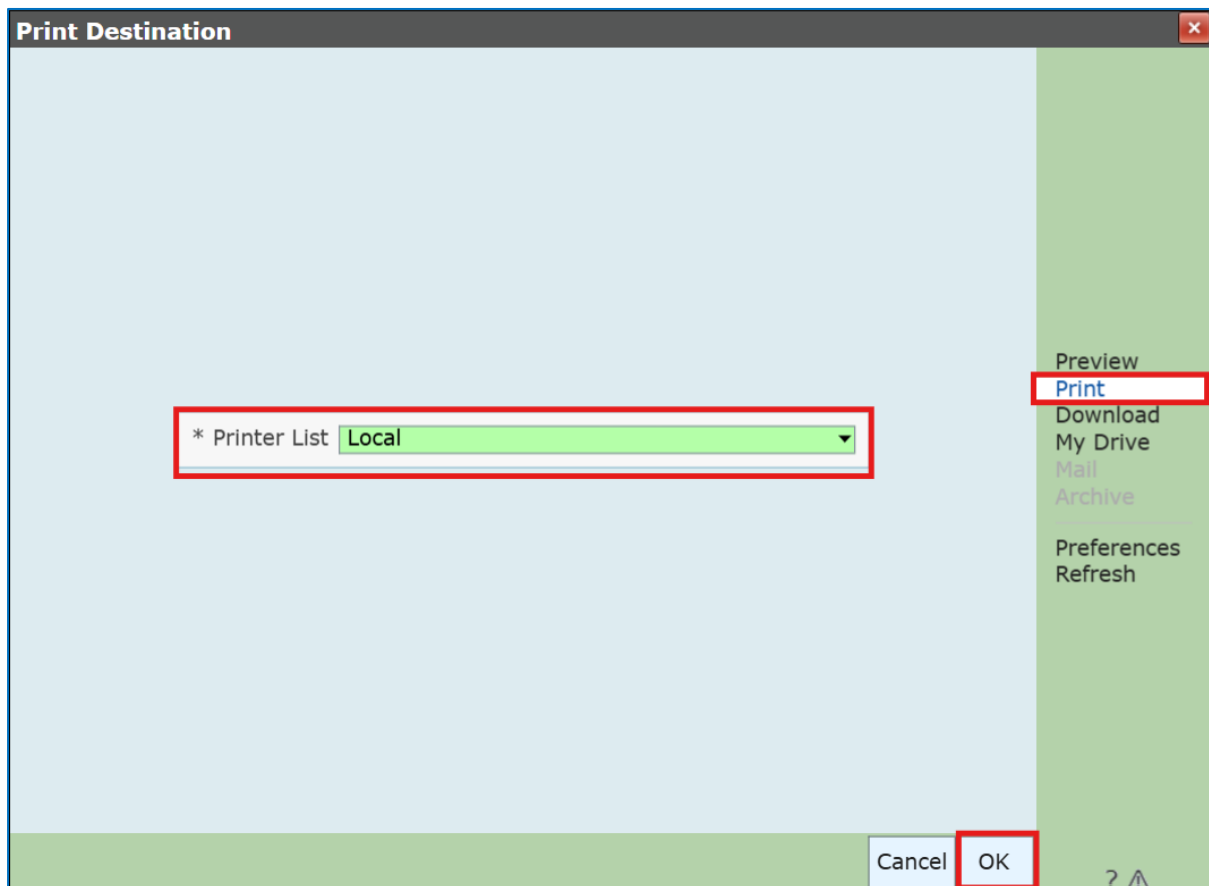
The below screen will pop up, to **download** the clinic list click **Preview** and then **OK**



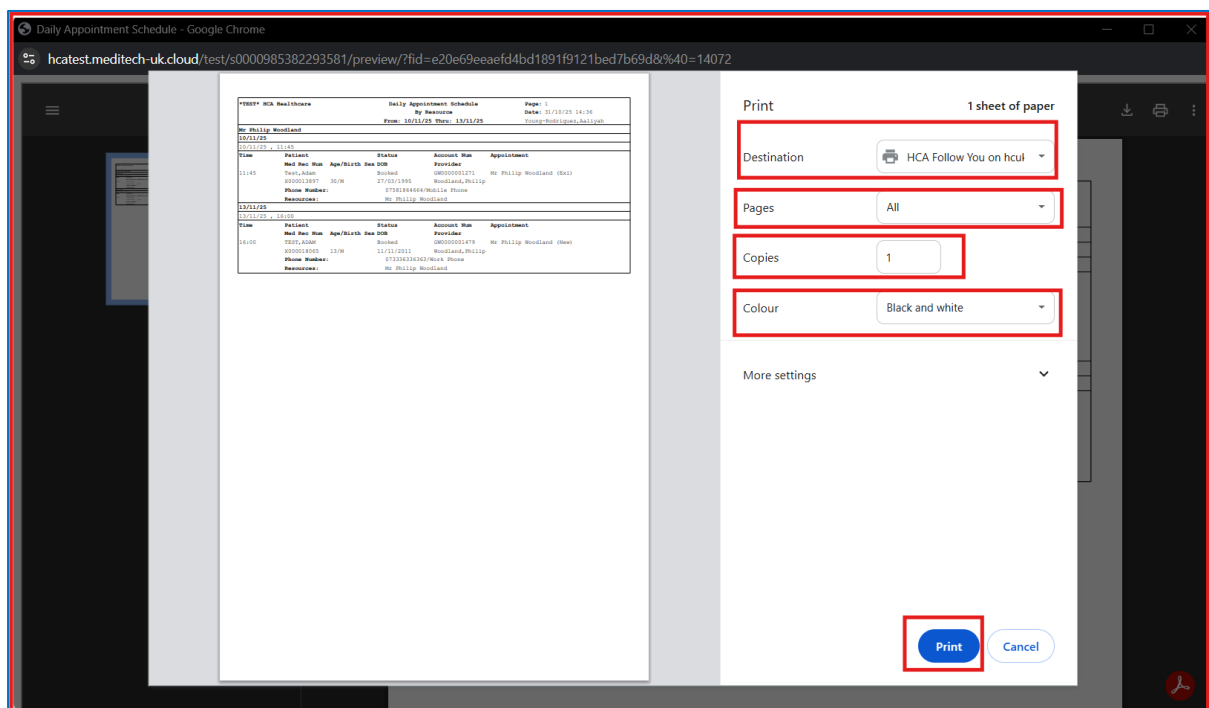
A pop-up window will appear where you can then download or also print the list as required:



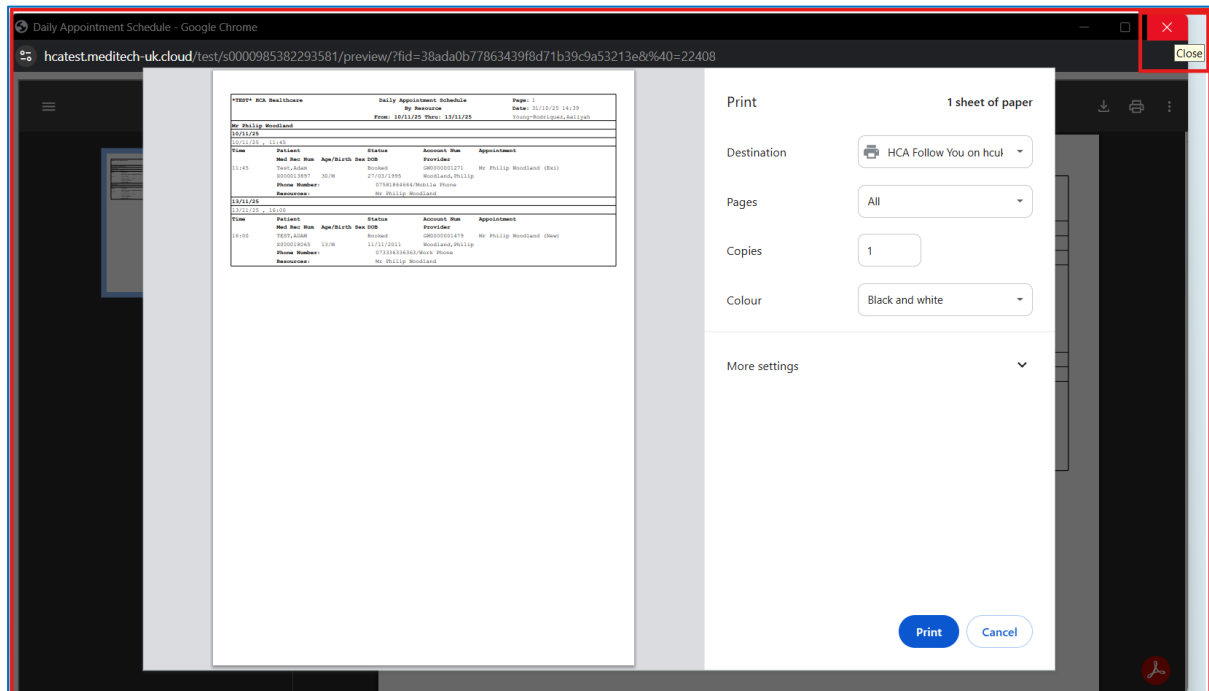
To print the list immediately, click **Print**, select **Local** and then click **OK**



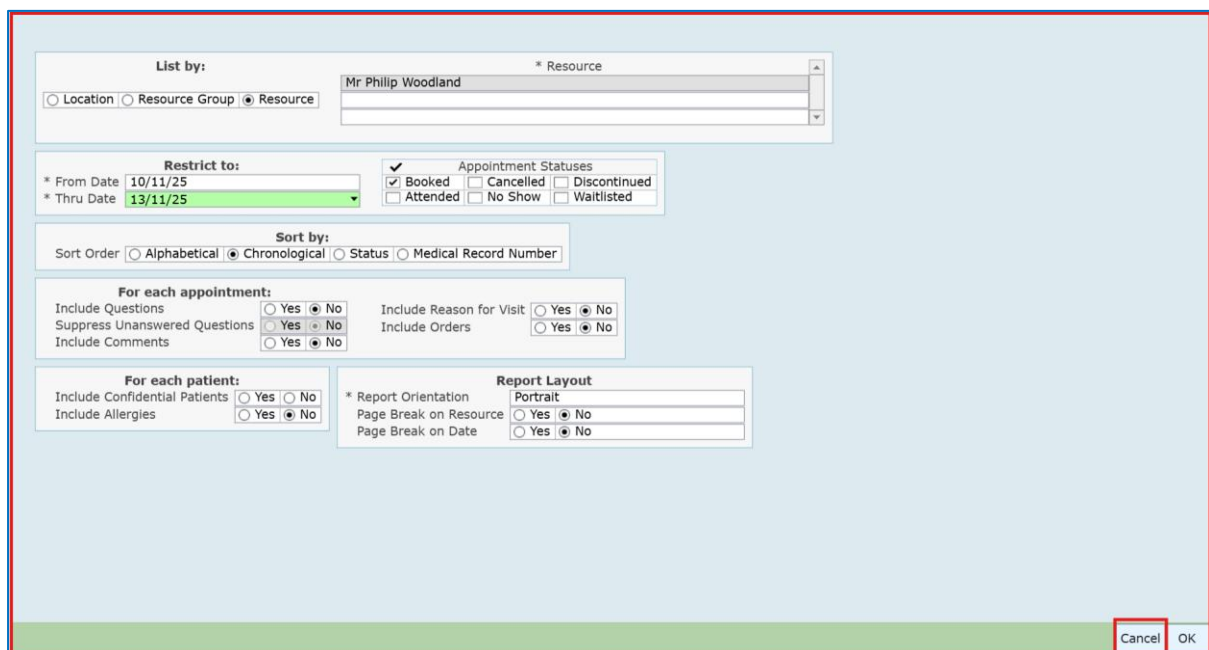
You will see the below pop-up window. **Select the Destination Printer, Pages required, Number of Copies, Colour Preferences** and then **Print**



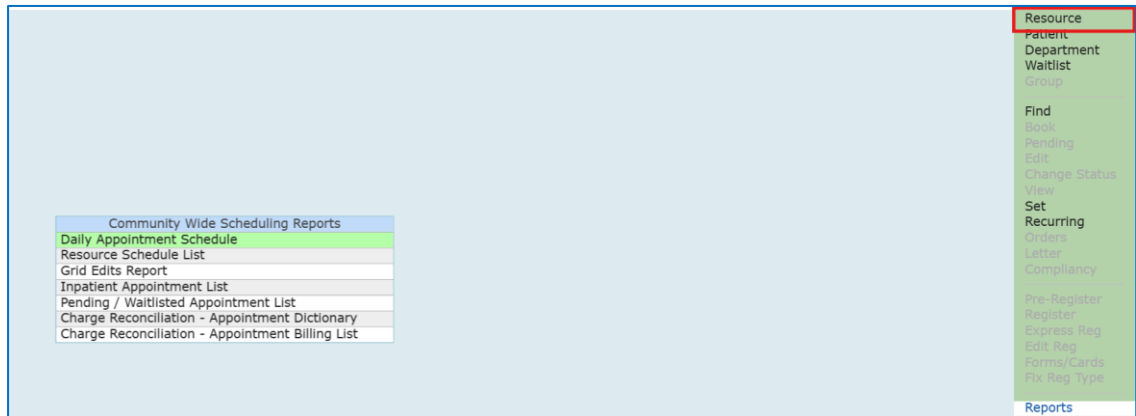
Once you have Printed or Downloaded your list, you will return to the below screen. To leave this area **click** on the **X button** at the top of the screen



You will then return to the below screen. **Click Cancel** on the below screen:

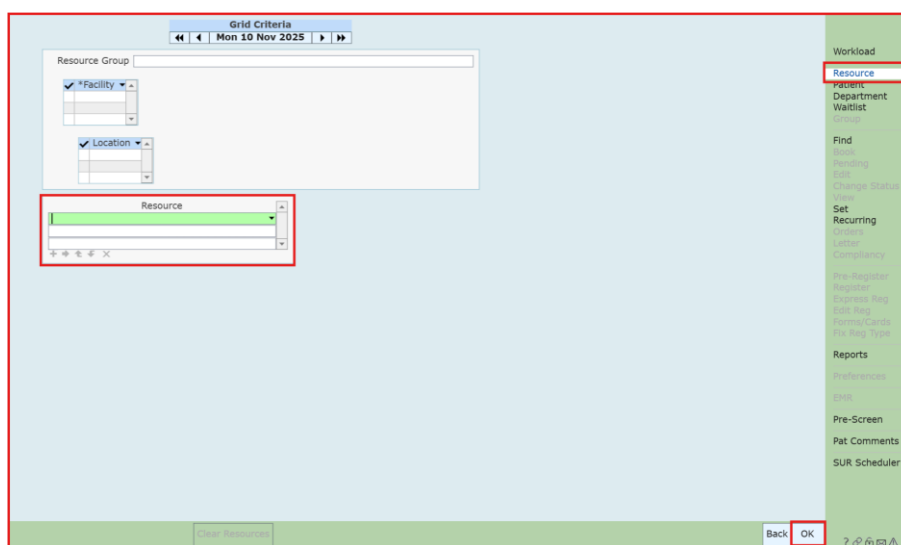


You will then see the below screen, click on Resource to go back to your consultant diary:



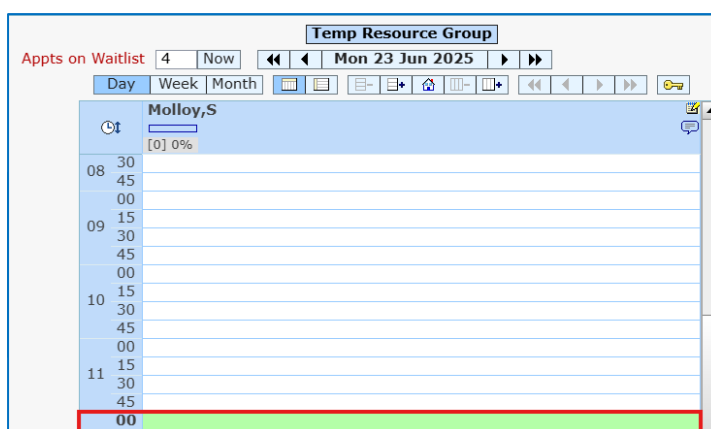
You will

then see the below screen, **Enter your consultant's mnemonic** as normal to find their diary and click **OK**:



## Consultant Appointment Scheduling via Resource Mode

To schedule a patient appointment, start with **selecting the available slot in the diary**.



Choose **Book** from the **Function** menu.

You will need to complete the fields in the grid.

Appt Demographics AMB Orders

Patient Facility Account Appointment Location Reason For Visit

30 Devonshire Street

Compliance

|           |   |
|-----------|---|
| Booked    | 0 |
| Attended  | 0 |
| Cancelled | 0 |
| No Show   | 0 |
| Edited    | 0 |

Address Insurance Policy Number Auth/Ref

Employer Primary Care Prov Language

Resource Group Start Duration Use Resource Include/Exclude

Search Time Slot Appt Date 23/06/25 12:00

Duration Reg Type Priority

Provider Comment Waitlist

Facility 30 Devonshire Street

Fill in the following details:

- **Start with finding your Patient:**
  - Enter the **Patient** into the **Patient field: (you can search by X number, surname etc)**
  - When using a **surname**, this will bring you to a **patient look up**, including all records found

**Patient Lookup**

Last Name First Name Middle Name Birthdate Age Birth Sex HCN Policy Num Email Phone Number

Best Match Records Found (Weight Range)

Best (25+) 0 Probable (16-24) 0 Possible (13-15) 0

Records Found Total 4

|    | Med Rec Num NHS Number | Name                     | Birthdate Age/Birth Sex | Address Primary Phone                           | Other Names | General Practitioner |
|----|------------------------|--------------------------|-------------------------|---|-------------|----------------------|
| 10 | X000014261             | Adam,Adjustment Approval | 01/01/1970 55/Unknown   | 1 London Bridge London, SE1 9BG 1234564789      |             | Abantao,Justine H... |
| 10 |                        | adam,Jones               | 11/01/2020 5/Male       |   |             |                      |
| 10 |                        | adam,mohamed             | 10/10/2008 17/Male      | 16 Sandhurst Road LONDON, NW9 9LR trainpas6000  |             |                      |
| 8  | X000017720             | adams,karina             | 31/08/1982 43/Unknown   | Withers & Rogers Llp, Two LONDON, SE1 9RA 00000 |             |                      |

- **Account:** The account will always pre-populate as “New”
- **Appointment:** Choose the type of appointment i.e. **New, Existing** etc
- **Booking Information:** **Enter the below fields**

**Booking information**

\* Appointment added from secretary list?

\* Named provider?

\* Referred by registered GP?

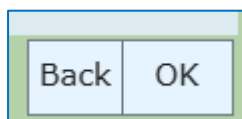
**Booking information**

\* Appointment added from secretary list? Yes

\* Named provider? No

\* Referred by registered GP? No

- Click **OK**



- **Reason for Visit:** This field is be manually typed – i.e. “spinal fracture, palpitations, 2<sup>nd</sup> opinion etc”

This section will display the resource group, which will automatically be labelled as Orthopaedics. The Duration field shows the length of the appointment, and the User Group field indicates the doctor's name.

| * Resource Group        | * Start | * Duration | Use Resource | Include/Exclude |
|-------------------------|---------|------------|--------------|-----------------|
| Orthopaedic consultants | 0       | 15         | Molloy,Sean  | Include         |
|                         |         |            |              |                 |
|                         |         |            |              |                 |

NB. Also on the **appointment tab**, the right-hand **Compliance** box displays the number of appointments the patient has booked, attended, cancelled, and currently has scheduled.

Appt

Demographics

AMB Orders

| Compliance |   |
|------------|---|
| Booked     | 0 |
| Attended   | 0 |
| Cancelled  | 0 |
| No Show    | 0 |
| Edited     | 0 |

If you need to add or update any of the patient's demographic information during the scheduling process, you can do so using the **Demographics tab**.

Appt

Demographics

AMB Orders

Patient

Address

Demo/Employer

Guarantor

Insurances

Coll Notes

Clinician

Special Indicators

Patient Information

\* Last Name

\* First Name

Middle

\* Prefix

Birthdate

Age

\* Birth Sex

Legal Sex

Pronouns

NHS Number

NHS Trace status

Hospital Number (Trust MR#)

Patient Other Name

Other Names

Type

Last

First

Middle

Prefix

Suffix

\* Type

**NB.** You will need to go through the **Insurances** tab prior to confirming the appointment. If this step is missed, the system will force you to check that the Insurances tab has been accessed.

**NB.** If the patient is insured and they provide you a claim/ pre-authorisation number, you need to do the below additional mandatory fields. **(If you do not have a claim / pre-authorisation number, you will not need to do the below! You can skip to where it says Ok and Save”**

You can do this by clicking **Policy**:

Enter the patient's **insurer** and **policy number** and then click **Manage Auth/Referrals**:

You will then see the below:

Click **New**, which is at the bottom of the screen.

You will then need to manually enter the

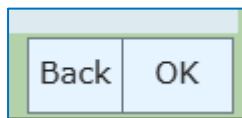
below information in the below purple fields:

The mandatory fields within the authorisation screen are:

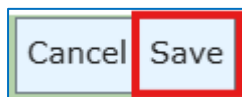
- Referral Type – This will always be **Outpatient**
- Status - This will always be **Approved**
- Status Reason – This will always be **Verified**
- Effective Date – This is the **Appointment Date**
- Expiration Date- this is also the **Appointment Date**.



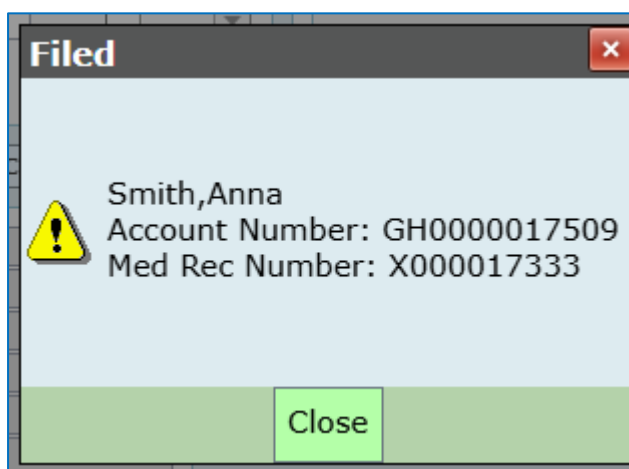
Click **OK Twice**.



Click **Save (when you finished Pre-registering)**



Once you've clicked on **Save**, you'll see a filed confirmation of the appointment.



Next you will see this below screen –

| Forms to Print                 |                                     |        |         |
|--------------------------------|-------------------------------------|--------|---------|
| Form                           | <input checked="" type="checkbox"/> | Copies | Printer |
| Registration Form Double Sided | <input type="checkbox"/>            |        |         |
| Registration Form Single Sided | <input type="checkbox"/>            |        |         |
| Reg Acct Opd Label Params      | <input type="checkbox"/>            |        |         |

| Labels to Print |                                     |        |         |
|-----------------|-------------------------------------|--------|---------|
| Label           | <input checked="" type="checkbox"/> | Copies | Printer |
| OPD ID Label    | <input type="checkbox"/>            |        |         |

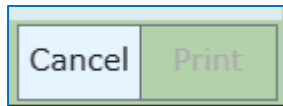
Click **Cancel**



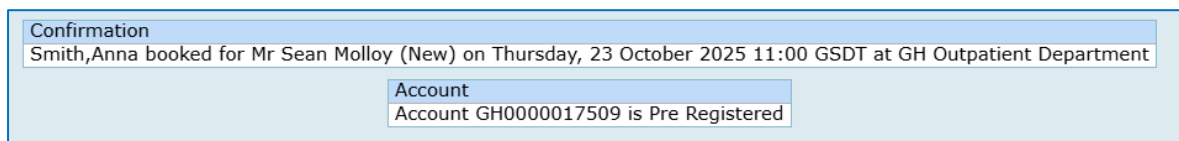
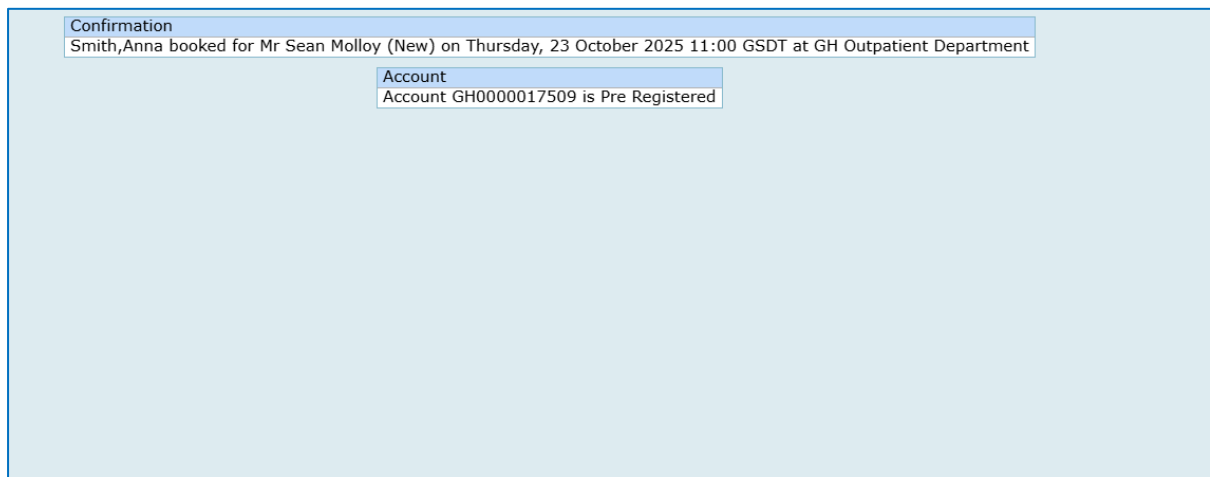
Next you will see this below scanning screen –

| Scanning                            |          |           |     |      |      |            |
|-------------------------------------|----------|-----------|-----|------|------|------------|
| <input checked="" type="checkbox"/> | Document | Insurance | Rec | User | Date | Created On |
|                                     |          |           |     |      |      |            |
|                                     |          |           |     |      |      |            |
|                                     |          |           |     |      |      |            |
|                                     |          |           |     |      |      |            |
|                                     |          |           |     |      |      |            |
|                                     |          |           |     |      |      |            |
|                                     |          |           |     |      |      |            |
|                                     |          |           |     |      |      |            |
|                                     |          |           |     |      |      |            |

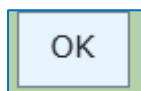
Click **Cancel**



Finally, you will see a confirmation of the appointment being booked on the schedule, including the confirmation of the pre-registration being completed.



Click **OK**.



You can now view the patient's appointment on the diary.

Appts on Waitlist

Day

| MOLSE |                          |
|-------|--------------------------|
| ⌚     |                          |
|       | [2] 14%                  |
| 07 45 |                          |
| 00    |                          |
| 08 15 |                          |
| 30    |                          |
| 45    |                          |
| 09 00 |                          |
| 15    |                          |
| 30    |                          |
| 45    |                          |
| 10 00 | Smith,Anna               |
| 15    | GH Outpatient Department |
| 30    |                          |
| 45    |                          |
| 11 00 | Smith,Anna               |
| 15    | GH Outpatient Department |
| 30    |                          |
| 45    |                          |
| 11 10 |                          |
| 15    |                          |
| 20    |                          |
| 25    |                          |
| 30    |                          |
| 35    |                          |
| 40    |                          |
| 45    |                          |
| 50    |                          |
| 55    |                          |
| 00    | Salah,Shahira            |
| 05    | GD Outpatient Department |
| 10    | Mr Pramod Achan (Exi)    |

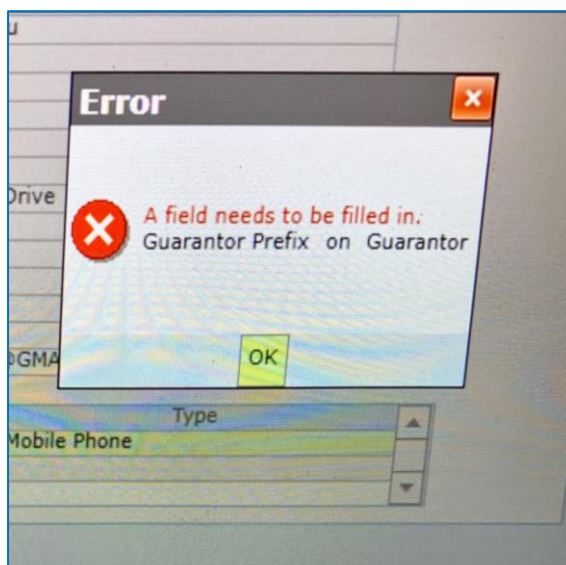
**Reminder:** If you want to reduce the increment to, say, 5 minutes, you will be able to see more details about the patient on the diary.

## Guarantor Guidance – Prefix & Updating

### Guarantor Details

When booking an appointment and you have come to the point of confirming the appointment. You may see the below error message, where the system is asking you to complete the

**Guarantor Prefix on Guarantor**



The system, will automatically take you to the demographics section of the patient, click on **Guarantor**

The screenshot shows the 'Guarantor' page in the Expanse system. The top navigation bar includes tabs for Patient, Address, Demo/Employer, Contacts, Insurances, and Guarantor (which is highlighted). Below the navigation bar, there are several sections: 'Patient Information' with fields for Last Name (Test), First Name (Agnes), Middle, Prefix (MRS), Birthdate (05/01/1977), Age (48), Birth Sex (F), Legal Sex (Female), Pronouns, NHS Number, and NHS Trace status. To the right is the 'Patient Other Name' section with a table for Other Names and a dropdown for Type. Below these are sections for 'Concierge Patient' (with fields for Concierge patient? and Concierge patient type) and 'VIP/Confidential' (with fields for VIP, VIP Comment, Confidential, and Comment).

Once on the **Guarantor** page you will see that the **Prefix** is blank. This needs to be added in, before you can confirm the appointment for the patient.

To update the **Prefix**, click on the button “**Update Guarantor Demographics**” at the bottom of the screen.

This screenshot shows the 'Guarantor' page with more detailed information. The 'Guarantor' field is set to 'TEST,ABBIE18 GN00001890' and 'Rel to Patient' is 'Civil Partner'. The 'Prefix' field is highlighted with a red box. Below the name fields are fields for Suffix, Language, Address (1 LONDON BRIDGE), Town (LONDON), County (Aberdeen), Post Code (ity SE1 1TG), Country (Aruba), and Email (abbie18@hca.uk). There is also a section for Phone (12345668989) and Work Phone. At the bottom of the page, there is a green bar with buttons: Scanning, Search for a Different Guarantor, Update Guarantor Demographics (highlighted with a red box), Remove Guarantor, and Financial Information. To the right of the main form, there is a vertical list of buttons with a green arrow pointing down. Below the main form, there is an 'Email' field with the value 'abbie18@hca.uk'.

This will take you to the below screen

Click on the **LookUp** arrow, which will provide a selection of Prefix's/salutations.

**N.B** You can change any of the details for the **Guarantor** in this section.

**Prefix Lookup**

Search

| Locator | Mnemonic |
|---------|----------|
| ADMIR   | ADMIR    |
| AMBAS   | AMBAS    |
| BARON   | BARON    |
| BAROS   | BAROS    |
| BISHO   | BISHO    |
| BRIGA   | BRIGA    |
| BROTH   | BROTH    |
| CANON   | CANON    |
| CAPTA   | CAPTA    |
| CHIEF   | CHIEF    |
| COLON   | COLON    |
| COUNC   | COUNC    |
| COUNS   | COUNS    |
| COUNT   | COUNT    |
| DAME    | DAME     |
| DR      | DR       |
| DUCHE   | DUCHE    |
| DUKE    | DUKE     |
| EARL    | EARL     |
| EMPER   | EMPER    |

Locator

Previous **Next** Cancel

**Click** on the required **Prefix** (there are multiple pages to choose from), then once selected, this will populate the field, and you can select **Save**

Guarantor: GN00001890 TEST,ABBIE18

\* Last Name: TEST  
 \* First Name: ABBIE18  
 Middle:  
 Prefix: **COUNT**  
 Suffix:  
 Legal Sex: Female  
 Language:

Address: 1 LONDON BRIDGE  
 Town: London  
 County: Aberdeen  
 Post Code: ity SE1 1TG  
 Country: Aruba

Phone: 12345668989 Work Phone: Type:  
 Email: abbie18@hca.uk

Cancel **Save**

This will take you back to the **main demographics section** on the **Guarantor** Page and you can see the Prefix is now filled in. Press **OK**

|           |            |                    |          |            |                  |
|-----------|------------|--------------------|----------|------------|------------------|
| Patient   | Address    | Demo/Employer      | Contacts | Insurances | <b>Guarantor</b> |
| Clinician | Coll Notes | Special Indicators |          |            |                  |

|                |                         |
|----------------|-------------------------|
| Guarantor      | TEST,ABBIE18 GN00001890 |
| Rel to Patient | Civil Partner           |
| Last Name      | TEST                    |
| First Name     | ABBIE18                 |
| Middle         |                         |
| <b>Prefix</b>  | <b>COUNT</b>            |
| Surfix         |                         |
| Language       |                         |
| Address        | 1 LONDON BRIDGE         |
| Town           | LONDON                  |
| County         | Aberdeen                |
| Post Code      | ity SE1 1TG             |
| Country        | Aruba                   |
| Email          | abbie18@hca.uk          |

| Phone       | Work Phone | Type |
|-------------|------------|------|
| 12345668989 |            |      |

|          |                                  |                               |                  |                       |        |           |
|----------|----------------------------------|-------------------------------|------------------|-----------------------|--------|-----------|
| Scanning | Search for a Different Guarantor | Update Guarantor Demographics | Remove Guarantor | Financial Information | Cancel | <b>OK</b> |
|----------|----------------------------------|-------------------------------|------------------|-----------------------|--------|-----------|

Once you have clicked **OK**; this will take you back to the main appointment booking screen:

|      |  |              |            |
|------|--|--------------|------------|
| Appt |  | Demographics | AMB Orders |
|------|--|--------------|------------|

|                    |                          |            |        |   |
|--------------------|--------------------------|------------|--------|---|
| Facility           | London Digestive Centre  | Compliance | Booked | 7 |
| * Account          | <New>                    | Attended   | 0      |   |
| * Appointment      | Mr Philip Woodland (New) | Cancelled  | 1      |   |
| * Location         | GW Outpatient Department | No Show    | 4      |   |
| * Reason For Visit | colonoscopy              | Edited     | 0      |   |

|                   |                |           |          |               |          |
|-------------------|----------------|-----------|----------|---------------|----------|
| Address           | 12 SW, WWW     | Insurance | Self Pay | Policy Number | Auth/Ref |
| Work Phone        | 073336336363   |           |          |               |          |
| Employer          | Asco Foods Ltd |           |          |               |          |
| Primary Care Prov | Abbas,Yusuf    |           |          |               |          |
| Language          |                |           |          |               |          |

| * Resource Group | * Start | * Duration | Use Resource | Include/Exclude |
|------------------|---------|------------|--------------|-----------------|
| Gastroenterology | 0       | 30         |              | Include         |

|          |                              |
|----------|------------------------------|
| Resource | Mr Philip Woodland [ACY6141] |
|----------|------------------------------|

|             |                |            |                       |            |                 |
|-------------|----------------|------------|-----------------------|------------|-----------------|
| Search      |                | * Duration | 30                    | * Provider | Woodland,Philip |
| Time Slot   |                | * Reg Type | Provider Office Visit | Comment    |                 |
| * Appt Date | 13/11/25 16:00 | Priority   |                       | Waitlist   |                 |

|              |              |                |                       |            |      |        |             |
|--------------|--------------|----------------|-----------------------|------------|------|--------|-------------|
| atient ments | Instructions | Appt Questions | Manage Auth/Referrals | Pre-Screen | Save | Cancel | <b>Save</b> |
|--------------|--------------|----------------|-----------------------|------------|------|--------|-------------|

Click **Save**

|  |
|--|
| <b>Confirmation</b>  |
| TEST,ADAM booked for Mr Philip Woodland (New) on Thursday, 13 November 2025 16:00 GSST at GW Outpatient Department |

The appointment is now booked.

## How to Edit & Cancel Appointments

If a patient contacts you to reschedule their appointment and needs to move it to a later time during the day, if it's for the same consultant, you can simply **select and hold** the appointment and drag it to an earlier or later time. I.e. 12:30pm from 11:00am.

|    |                          |
|----|--------------------------|
| 30 |                          |
| 45 |                          |
| 00 | Smith, Anna              |
| 15 | GH Outpatient Department |
| 30 |                          |
| 45 |                          |
| 00 |                          |
| 15 |                          |
| 30 |                          |
| 45 |                          |
| 00 |                          |
| 15 |                          |
| 30 |                          |

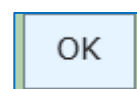
Next, enter an **Edit Reason**.  
Click the **Lookup arrow**, to view the **Edit Reasons**

\* Edit Reason

| Name                           | Mnemonic   |
|--------------------------------|------------|
| Cancelled by Consultant        | 1CBC       |
| Cancelled by department        | 1CBD       |
| Cancelled by pat less 24hrs    | 1CBP24     |
| Cancelled by patient           | 1CBP       |
| Consult/treatment not required | 1CNR       |
| Deceased                       | 1DEC       |
| Equipment failure/unavailable  | 1EQF       |
| Face to Face POA apt. required | SURF2FAPPT |
| Incorrect visit                | 1ADMINC    |
| Insufficient funds available   | 1CPIF      |
| Rescheduled by department      | 1RBD       |
| Rescheduled by patient         | 1RBP       |
| Rescheduled Consultant         | 1RBC       |
| Transferred to other facility  | 1TRANSFER  |
| Treatment complete/discharged  | 1CRCR      |

\* Edit Reason

Then select **OK**



We can now see that the appointment has been rescheduled to 12:30 PM.

|  |
|--|
| Confirmation   |
| Smith,Anna booked for Mr Sean Molloy (New) on Thursday, 23 October 2025 12:30 GSDT at GH Outpatient Department |

Then select **OK**

|    |
|----|
| OK |
|----|

The patient has now been moved in the diary from 11:00am, to 12:30pm

|    |    |                          |
|----|----|--------------------------|
| 11 | 00 |                          |
|    | 15 |                          |
|    | 30 |                          |
|    | 45 |                          |
| 12 | 00 |                          |
|    | 15 |                          |
|    | 30 | Smith,Anna               |
|    | 45 | GH Outpatient Department |
|    | 00 |                          |

If you'd like to reschedule to a **different day**, without using the drag and drop function, you can use the **Edit option in the Function Menu**.

|               |
|---------------|
| Pending       |
| Edit          |
| Change Status |
| View          |
| Set           |

The Edit function brings us to the **CWS Edit Appointment** window.

|   |                                       |
|---|---------------------------------------|
| Salah,Shahira - <b>CWS Edit Appointment</b> (HCA TEST - TEST) |                                       |
| Shahira   | 25/06/25 13:00 -                      |
| 10/01/1992  | Spec Indicators: None                 |
| HSPT  | Allergy/Adv: Not Recorded             |
| Num: 2653   |                                       |
| <div>Appt</div> <div>Demographics</div> <div>AMB Orders</div> |                                       |
| Facility  | Wellington Hospital                   |
| * Account   | WH0000216069                          |
| * Appointment   | SALT Follow Up 30m                    |
| * Location  | WH Speech Therapy                     |
| * Reason For Visit  | F/U                                   |
| Address   | 47 Alexander Road Birmingham, B27 6ER |
| Mobile Phone  | 000000000000                          |
| Employer  |                                       |
| Primary Care Prov   |                                       |
| Insurance   | SP                                    |

The appointment's date and time can be adjusted using the box located *at the bottom left corner* under **New Date**.



Savannah Hill [ACT9890]

Search

Time Slot

**New Date**

Appt Date 25 June 2025 1.00p

Use the **LookUp** function to retrieve a calendar, allowing you to select and modify the calendar as needed.

New Date

**Date / Time**

June 2025

| Sun | Mon | Tue | Wed | Thu | Fri | Sat | Hour | Min   |
|-----|-----|-----|-----|-----|-----|-----|------|-------|
| 1   | 2   | 3   | 4   | 5   | 6   | 7   | 00   | 13 00 |
| 8   | 9   | 10  | 11  | 12  | 13  | 14  | 01   | 14 05 |
| 15  | 16  | 17  | 18  | 19  | 20  | 21  | 02   | 15 10 |
| 22  | 23  | 24  | 25  | 26  | 27  | 28  | 03   | 16 15 |
| 29  | 30  |     |     |     |     |     | 04   | 17 20 |
|     |     |     |     |     |     |     | 05   | 18 25 |
|     |     |     |     |     |     |     | 06   | 19 30 |
|     |     |     |     |     |     |     | 07   | 20 35 |
|     |     |     |     |     |     |     | 08   | 21 40 |
|     |     |     |     |     |     |     | 09   | 22 45 |
|     |     |     |     |     |     |     | 10   | 23 50 |
|     |     |     |     |     |     |     | 11   | 24 55 |
|     |     |     |     |     |     |     | 12   |       |

<< < Today > >>

\*Date

\*Time

Cancel OK

If you want to reschedule the appointment for the next day at **12 PM** - To use the function within the calendar, either select the date and time or type the date and time directly into the field at the bottom of the Date/Time screen and click **OK**.

**Date / Time**

June 2025

| Sun | Mon | Tue | Wed | Thu | Fri | Sat | Hour | Min   |
|-----|-----|-----|-----|-----|-----|-----|------|-------|
| 1   | 2   | 3   | 4   | 5   | 6   | 7   | 00   | 13 00 |
| 8   | 9   | 10  | 11  | 12  | 13  | 14  | 01   | 14 05 |
| 15  | 16  | 17  | 18  | 19  | 20  | 21  | 02   | 15 10 |
| 22  | 23  | 24  | 25  | 26  | 27  | 28  | 03   | 16 15 |
| 29  | 30  |     |     |     |     |     | 04   | 17 20 |
|     |     |     |     |     |     |     | 05   | 18 25 |
|     |     |     |     |     |     |     | 06   | 19 30 |

<< < Today > >>

\*Date

\*Time

Cancel OK

Search

Time Slot

**New Date** 26/06/25 12:00

Appt Date 25 June 2025 1.00p

The updated date and time for the appointment are now displayed in the **New Date** field.

Click on the **Edit Reason** field, the **Reason Lookup** window will display, and you can **select a Reason – Incorrect Visit**.

**Reason Lookup**

Search

| Name                           | Mnemonic       |
|--------------------------------|----------------|
| Cancelled by Consultant        | 1CBC           |
| Cancelled by department        | 1CBD           |
| Cancelled by pat less 24hrs    | 1CBP24         |
| Cancelled by patient           | 1CBP           |
| Consult/treatment not required | 1CNR           |
| Deceased                       | 1DEC           |
| Equipment failure/unavailable  | 1EQF           |
| Face to Face POA apt. required | SURF2FAPPT     |
| <b>Incorrect visit</b>         | <b>1ADMINC</b> |
| Insufficient funds available   | 1CPIF          |
| Rescheduled by department      | 1RBD           |
| Rescheduled by patient         | 1RBP           |
| Rescheduled Consultant         | 1RBC           |
| Transferred to other facility  | 1TRANSFER      |
| Treatment complete/discharged  | 1CRCR          |

You can now proceed to **Save** the CWS Edit Appointment window.

A confirmation popup will appear showing the new appointment date and time. Please click **OK**.

OK

Confirmation  
Salah,Shahira booked for SALT Follow Up 30m on Thursday, 26 June 2025 12:00 GSDT at WH Speech Therapy

If you need to cancel the appointment, you can use the **Change Status** function from the **Function Menu** and click the **Cancel** button.

Edit  
**Change Status**  
View  
Set  
Recurring

**Change Status**

| Day                | Appointment           | Dur | St     |
|--------------------|-----------------------|-----|--------|
| Mon 23/06/25 12:30 | Mr Pramod Achan (Exi) | 15  | Booked |

Status

- ☐ Booked
- ☐ Attended
- ☒ **Cancelled**
- ☐ Inactive
- ☐ DNA
- ☐ Pending
- ☐ Rebook
- ☐ Waitlisted
- ☐ Discontinued

**Note:** A "Cancelled" appointment will simply cancel that specific appointment, while "Discontinued" will stop all future appointments in the series

Please now enter the reason for cancellation by using the LookUp function to select an appropriate reason.

\* Reason

| Name                           | Mnemonic   |
|--------------------------------|------------|
| Cancelled by Consultant        | 1CBC       |
| Cancelled by department        | 1CBD       |
| Cancelled by pat less 24hrs    | 1CBP24     |
| Cancelled by patient           | 1CBP       |
| Consult/treatment not required | 1CNR       |
| Deceased                       | 1DEC       |
| Equipment failure/unavailable  | 1EQF       |
| Face to Face POA apt. required | SURF2FAPPT |
| Incorrect visit                | 1ADMINC    |
| Insufficient funds available   | 1CPIF      |
| Rescheduled by department      | 1RBD       |
| Rescheduled by patient         | 1RBP       |
| Rescheduled Consultant         | 1RBC       |
| Transferred to other facility  | 1TRANSFER  |
| Treatment complete/discharged  | 1CRCR      |

Click the **Save** button.

Cancel Save

Click **Yes** on the confirmation window.

**Confirmation**

? There are no appointments or cases remaining on account number GD0000001438. Cancel?

Yes No

The appointment is now cancelled.

Temp Resource Group

Appts on Waitlist 4 Now Mon 23 Jun 2025

Day Week Month

Molloy, S

[0] 0%

05

10

15

20

25

12 30

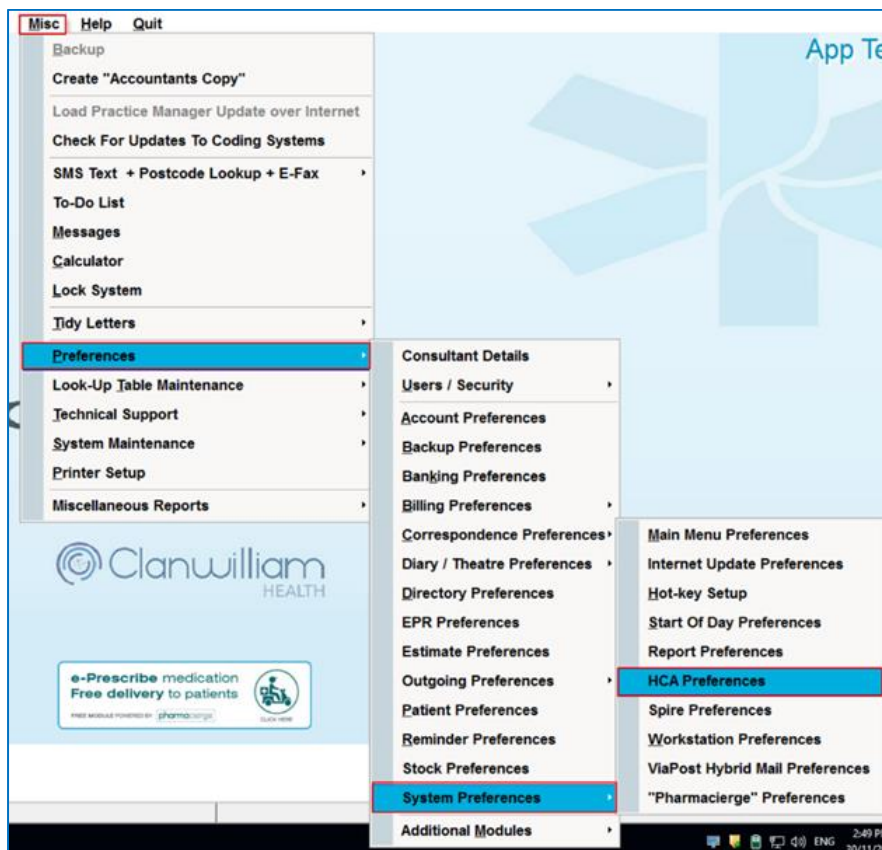
35

40

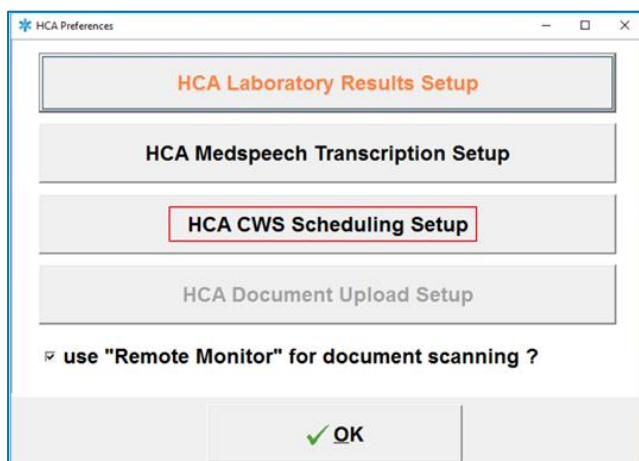
## How to Filter Out Unwanted Appointments on HCA / Citrix DGL

1. From the DGL home screen (after logging into Practice Manager) follow the below:

- Click “Misc”
- Then “Preferences”
- Then “HCA Preferences”



Next, a new window will appear, click “HCA CWS Scheduling Setup”



2. Locate the “Appointment Type Mapping” section of this screen and then locate the appointment(s) you would like to filter out of the clinic list(s):
  - Select the appointment in the “CWS Appointment Type” column and then click the same row in the “DGL Appointment Type” column
  - Click the drop down option to the right of the column to view the list of actions
  - To filter out the specific appointment, select “DELETE”
  - Do this for all appointments desired to be excluded from the clinic list(s)

**HCA CWS Scheduling Setup**

**Diary Mapping**

| HCA Mnemonic | Consultant No | Diary Name | Radiology | Send Message                        | Message To               |
|--------------|---------------|------------|-----------|-------------------------------------|--------------------------|
| ABC          | 2             | Al-Rubeyi  |           | <input checked="" type="checkbox"/> | BECKY;KINGS;PETER        |
| ALRBU        | 2             |            |           | <input type="checkbox"/>            | APPTTEST;BECKY;HAYLEY;KI |
| HAMMA20      | 2             | DrHammond  |           | <input type="checkbox"/>            |                          |
| Z.DGLPM      | 2             |            |           | <input checked="" type="checkbox"/> | KELLY                    |

**Appointment Type Mapping**

| CWS Appointment Type           | DGL Appointment Type |
|--------------------------------|----------------------|
| Consultation FU 15^Shard       | Follow Up            |
| Consultation GP                | Injection            |
| Consultation New 30^Shard      | New Patient          |
| Mr Paul Jairaj 544 New Pat 30m | DELETE               |
| Mr TEST DGL 649 New Pat 30m    | DELETE               |
|                                | AVAILABLE            |
|                                | Change Of IUD        |
|                                | Choose Book          |
|                                | Consent              |
|                                | Consultation FU 15   |
|                                | Consultation New 30  |

**Appointment Location Mapping**

| CWS Appt Location        | DGL Appt Location           |
|--------------------------|-----------------------------|
| 0                        |                             |
| 387                      | London Clinic (Non HCA)     |
| 388                      | Highgate Hospital (Non HCA) |
| Room 1^shard@HCA.sandbox | Portland Hospital           |
| Shard Outpatients        |                             |

NOTE: sr types the

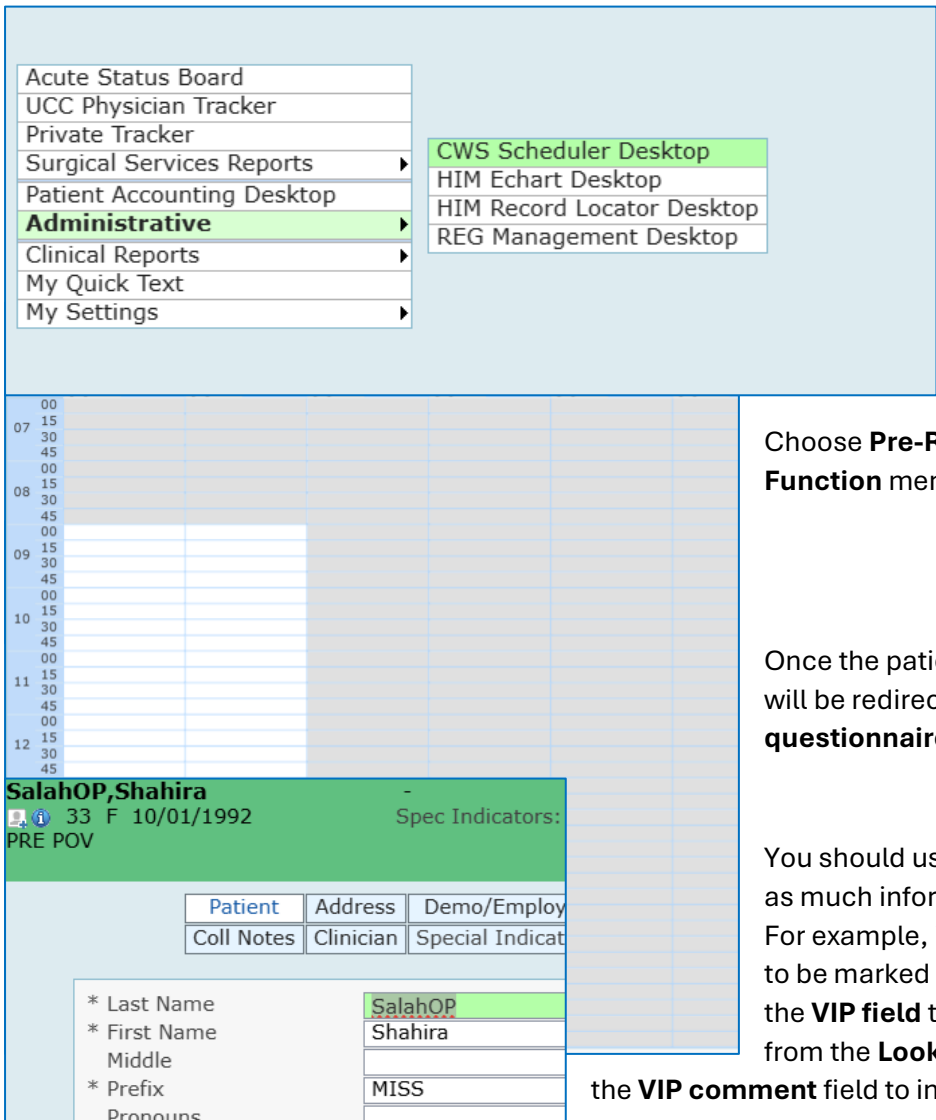
OK

- Once all desired changes have been made, click “OK”. This will close the dialogue box, and all newly imported appointments of that type will be automatically removed for the clinic list(s).

## Patient Registration

**Note:** 99% of the patients will already have been pre-registered.

To access the registration desktop, select **Administrative**, then **Community Wide Scheduling**, and finally click on the Scheduler **desktop**.



The screenshot shows the Expanse software interface. At the top, there is a navigation menu with the following items: Acute Status Board, UCC Physician Tracker, Private Tracker, Surgical Services Reports, Patient Accounting Desktop, **Administrative** (highlighted in green), Clinical Reports, My Quick Text, and My Settings. To the right of the menu, a sub-menu is visible with the following items: CWS Scheduler Desktop (highlighted in green), HIM Echart Desktop, HIM Record Locator Desktop, and REG Management Desktop. Below the menu, there is a large grid representing a schedule. The grid has columns for time slots (00, 15, 30, 45) and rows for dates (07, 08, 09, 10, 11, 12). The patient's name, SalahOP, Shahira, is displayed at the bottom of the grid. Below the grid, there is a form for patient information. The form has tabs for Patient, Address, Demo/Employ, Coll Notes, Clinician, and Special Indicat. The Patient tab is selected, and the form contains the following fields: Last Name (SalahOP), First Name (Shahira), Middle, Prefix (MISS), and Pronouns.

Select the required patient by clicking on their name in the schedule

Choose **Pre-Register** from the **Function** menu.

Once the patient is selected, you will be redirected to the **Patient questionnaire window**.

You should use this screen to input as much information as possible. For example, if the patient needs to be marked as **VIP**, you can use the **VIP field** to input **Yes or No** from the **LookUp** function and use the **VIP comment** field to input any information -

Please keep in mind that this status will be visible in the patient's future visits.

|               |            |           |  |                    |  |         |  |           |  |            |  |
|---------------|------------|-----------|--|--------------------|--|---------|--|-----------|--|------------|--|
| Patient       |            | Address   |  | Demo/Employer      |  | Contact |  | Guarantor |  | Insurances |  |
| Coll Notes    |            | Clinician |  | Special Indicators |  |         |  |           |  |            |  |
| * Last Name   | SalahOP    |           |  |                    |  |         |  |           |  |            |  |
| * First Name  | Shahira    |           |  |                    |  |         |  |           |  |            |  |
| Middle        |            |           |  |                    |  |         |  |           |  |            |  |
| * Prefix      | MISS       |           |  |                    |  |         |  |           |  |            |  |
| Pronouns      |            |           |  |                    |  |         |  |           |  |            |  |
| * Birthdate   | 10/01/1992 |           |  |                    |  |         |  |           |  |            |  |
| Age           | 33         |           |  |                    |  |         |  |           |  |            |  |
| * Birth Sex   | F          |           |  |                    |  |         |  |           |  |            |  |
| NHS Number    |            |           |  |                    |  |         |  |           |  |            |  |
| VIP           |            |           |  |                    |  |         |  |           |  |            |  |
| VIP Comment   | Yes        |           |  |                    |  |         |  |           |  |            |  |
| * Account Num | No         |           |  |                    |  |         |  |           |  |            |  |
| * Location    |            |           |  |                    |  |         |  |           |  |            |  |

**Note:** Ensure to go through all the tabs to verify that all mandatory fields are completed.

The **Coll Notes (collection notes)** tab can be used for any

notes.

|            |  |           |  |                    |  |
|------------|--|-----------|--|--------------------|--|
| Patient    |  | Address   |  | Demo/Employer      |  |
| Coll Notes |  | Clinician |  | Special Indicators |  |

The Clinician tab is used to fill in GP details.

|            |  |           |  |
|------------|--|-----------|--|
| Patient    |  | Address   |  |
| Coll Notes |  | Clinician |  |

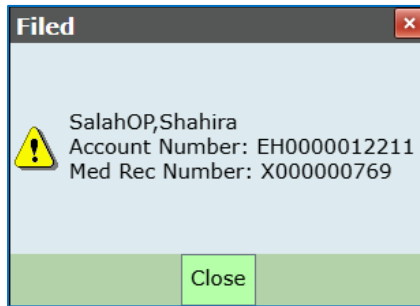
The Special Indicators tab is used to input **Safeguarding** data.

|  |  |           |  |                    |  |
|--|--|-----------|--|--------------------|--|
| Patient  |  | Address   |  | Demo/Employer      |  |
| Coll Notes   |  | Clinician |  | Special Indicators |  |
| Special Indicator  |  |           |  |                    |  |
| <div> <div>Aggressive/Violent</div> <div>Antibiotic Resistant Disease</div> <div>Autism</div> <div>Bleeding risk</div> <div>CMV negative</div> <div>Cytotoxic precautions</div> <div>Delirium</div> </div> |  |           |  |                    |  |

Click **Save**.

|        |      |
|--------|------|
| Cancel | Save |
|--------|------|

The confirmation of pre-registration is now displayed.



Once pre-Registered the OLR (Online Registration) will automatically send a link to the patient for online registration.

## Troubleshooting

### **Common Issues and Solutions:**

- System logs out unexpectedly: Always use the in-system refresh, not browser refresh.
- Cannot see a consultant diary: Check your Resource Group permissions or refresh your session.
- Patient not appearing: Ensure correct spelling or use MRN search.
- Printing fails: Confirm default printer setup or use 'Preview' to save as PDF.
- Results not visible: Ensure the correct visit is selected in the Account Number overlay.

## Quick Reference Cheat Sheet

- Login Path: HCA Email + Windows Password → Launch New Session
- CWS Access: Administrative → Community Wide Scheduling → Scheduler Desktop
- Book Appointment: Function Menu → Book
- Edit/Cancel Appointment: Function Menu → Edit or Change Status
- Patient Record: EMR – Electronic Medical Record → Patient Tabs

## Glossary

- CWS: Community Wide Scheduling – used to manage appointments and consultant diaries.
- EMR: Electronic Medical Record



- Subscriber: This is the policyholder
- OLR: Online Registration – automatic link sent to patients for registration details.
- Resource Group: A defined set of consultants or clinics viewable in CWS.
- Function Menu: Menu in Expanse containing core administrative actions (Book, Edit, Cancel).
- Diagnostics Tab: Area of the patient chart containing laboratory, imaging, and test results.

## Version Control

| Version | Date            | Changes         |
|---------|-----------------|-----------------|
| 1.0     | 21 October 2025 | Initial Release |
| 1.1     | 24 October 2025 | Second Release  |
| 1.2     | 31 October      | Third Release   |
| 1.3     | 14 November     | Fourth Release  |