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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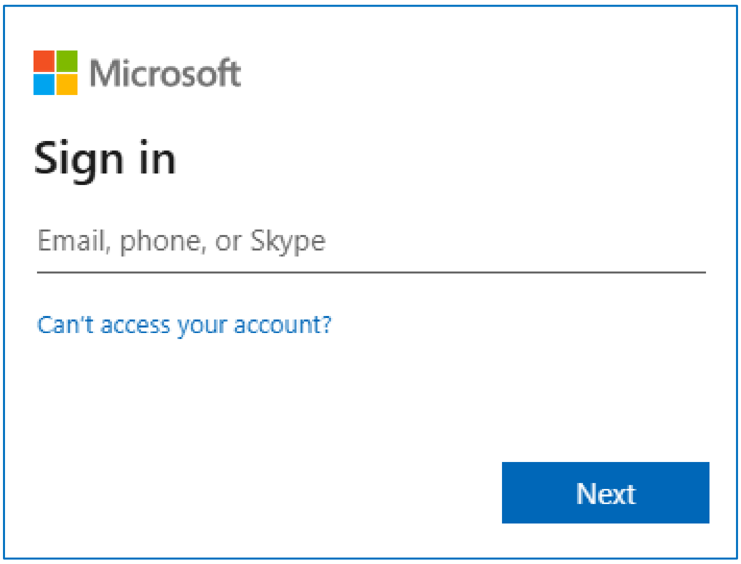
Logging into Expanse

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

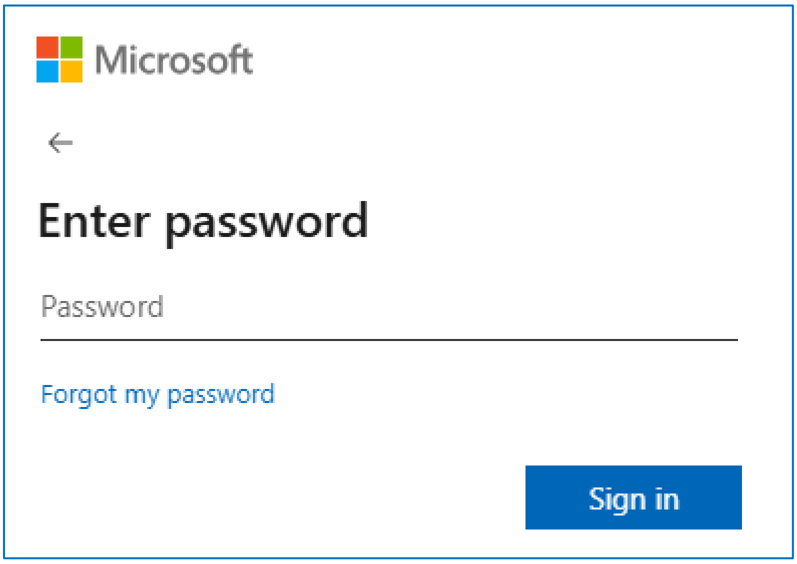
(don't click the link directly)

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

Your username: It will be your HCA email address

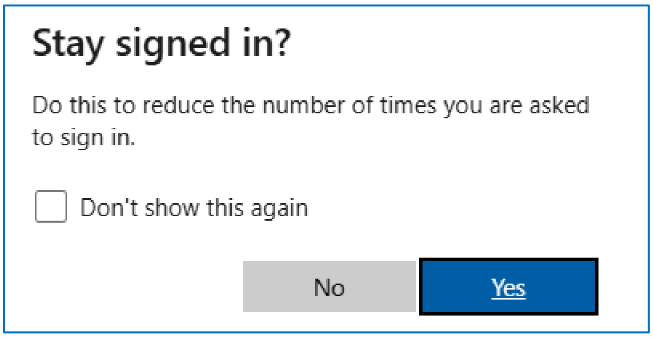


Your password: It will be the same as your Windows login.



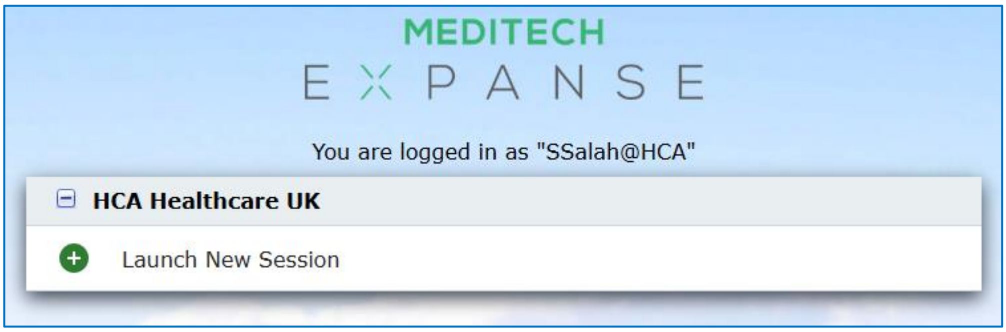
After you sign in, the "Stay signed in?" window will appear.

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



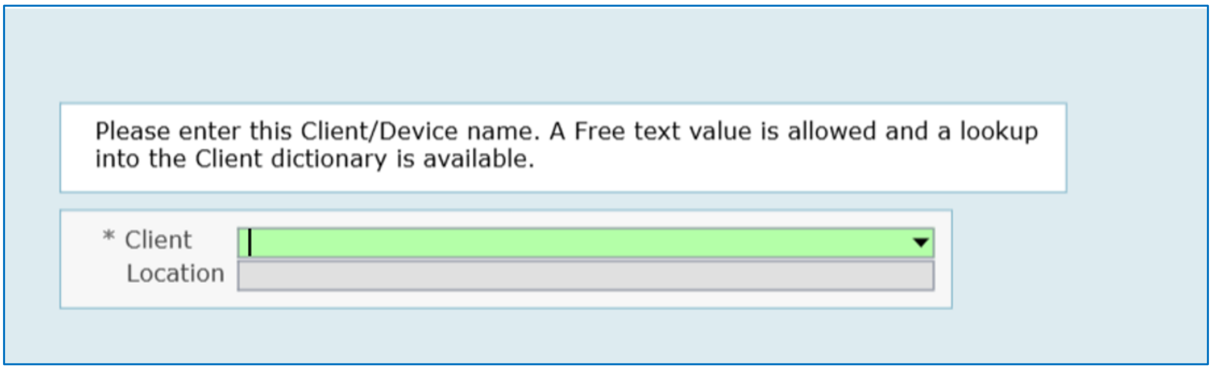
When signing in, you'll first see the Microsoft sign-in window.
Use your HCA email address as your username, and your password will be the same one you use to log in to Windows.

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.

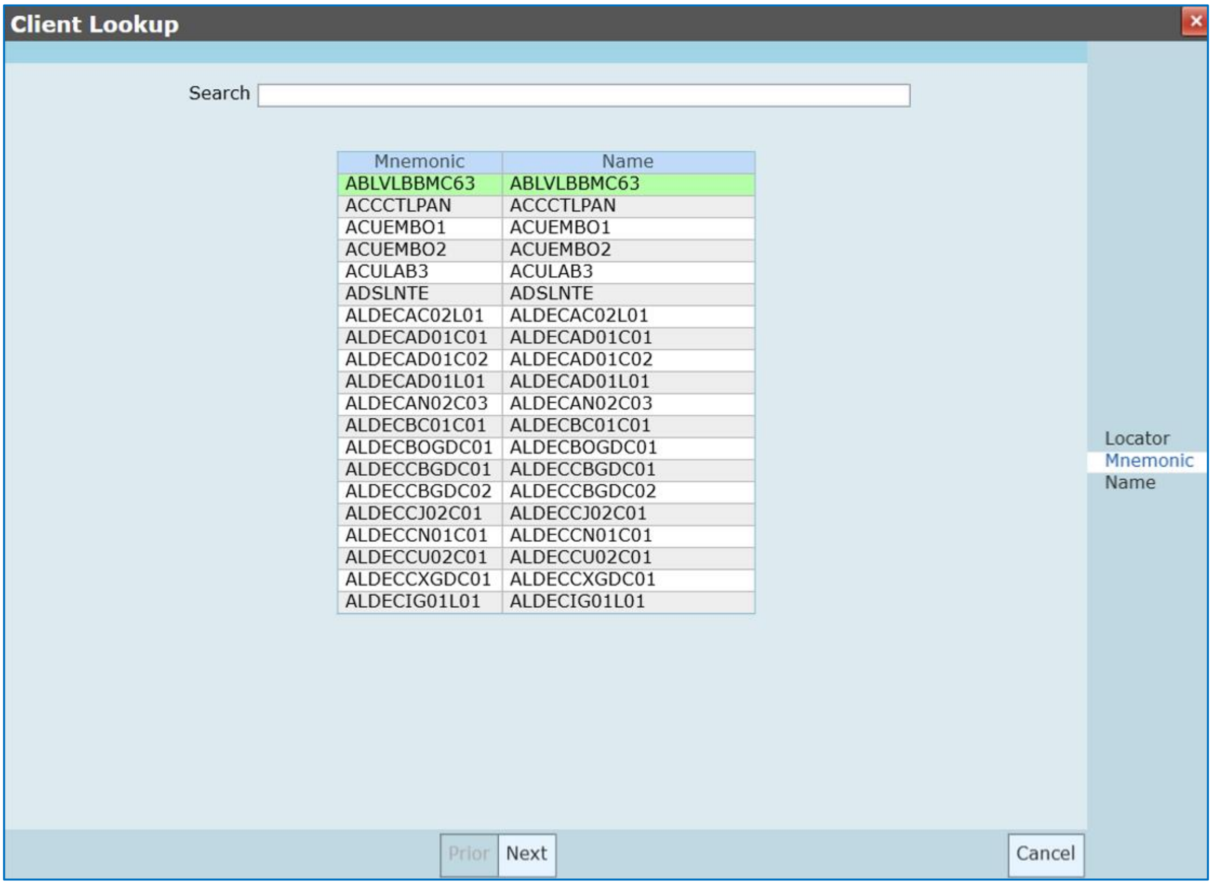


N.B As part of security, staff that use Expanse will be prompted to create a PIN number. This is planned to initially be "1234" at which point, when entered the system will prompt you to create your own 4-digit PIN number.

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: **ABLVLBBMC63** WITHIN **Client (you do not need to select a location)**

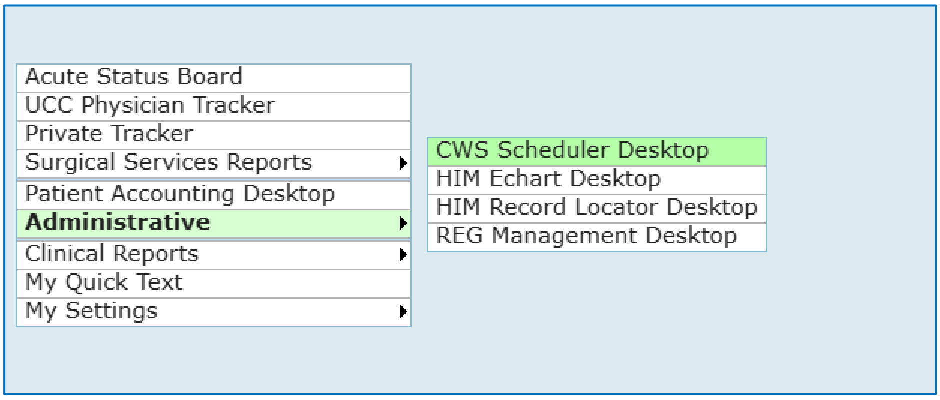


Then click **OK/Save**

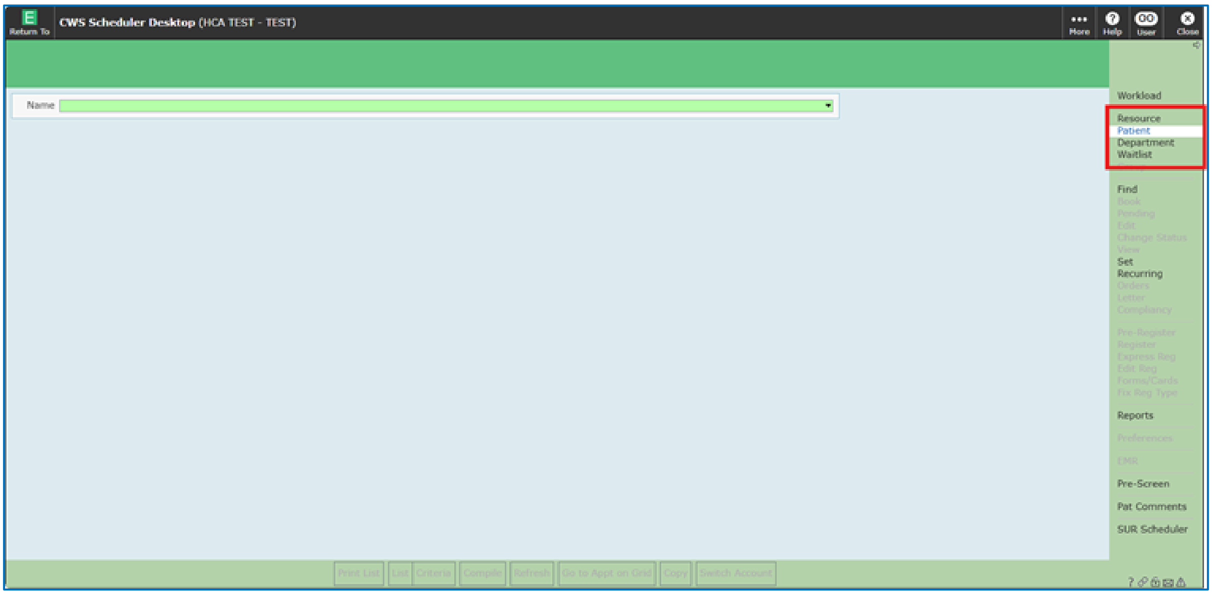
Introduction of the CWS Scheduler Desktop

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.**

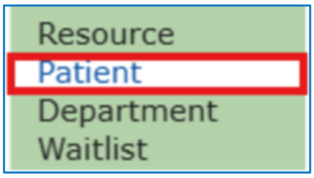


Next, the **CWS Scheduler Desktop** will open, where you'll notice a **Name** field located in the center of the screen.



The available modes will have different menu options when selected

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

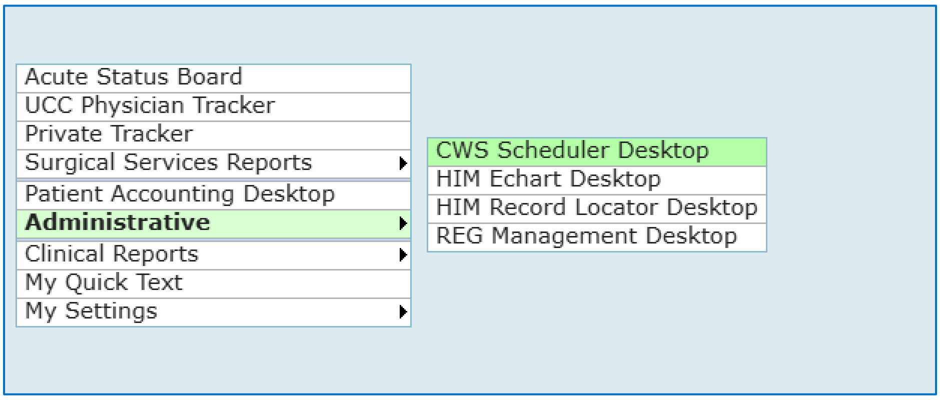


On the Functions menu, it defaults to Patient mode, which lets us search for a specific patient and book the appointments through the patient, however you must already know what date and time you want to book the patient in for as you cannot see the diary and availability through this way.

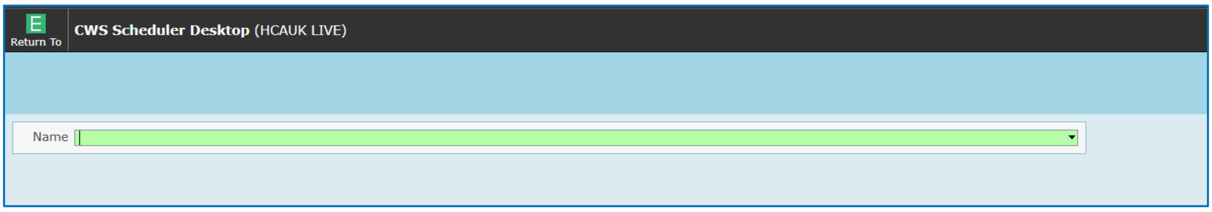
The more user-friendly option is to use the **Resource function**.

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

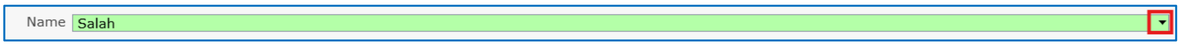
To find and view patient test results, go to the Main Menu, select **Administrative**, then choose **Community Wide Scheduling**, and finally click on **Scheduler Desktop**.



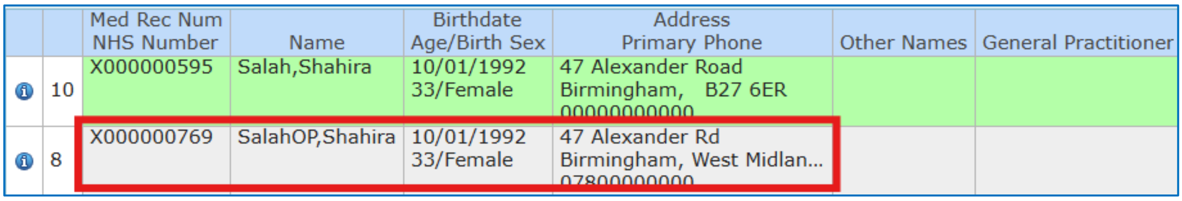
Next, you can open the **CWS Scheduler Desktop**, where you'll notice a **Name** field located in the centre of the screen.



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**.



***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"*

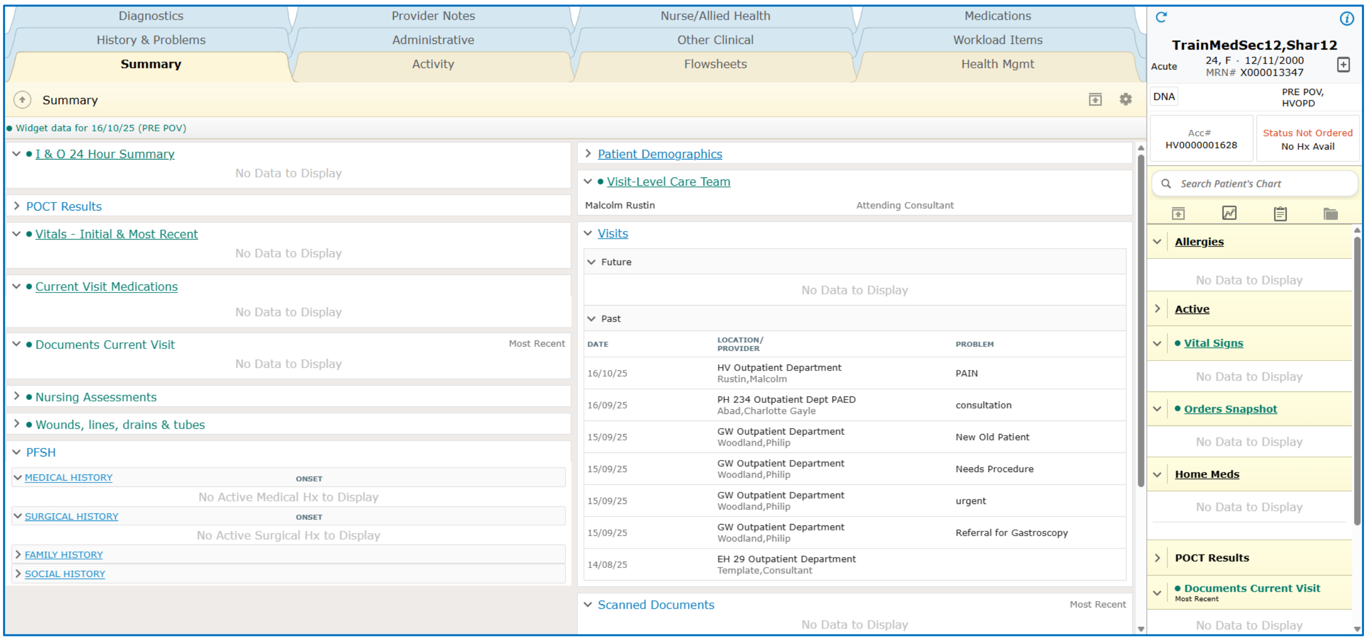
***NB:** All patients who have previously been entered as "XXX-Al" will need to be changed to its correct formation. (This will completed be as Patient Access or the medical secretary come across these patients*

***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.

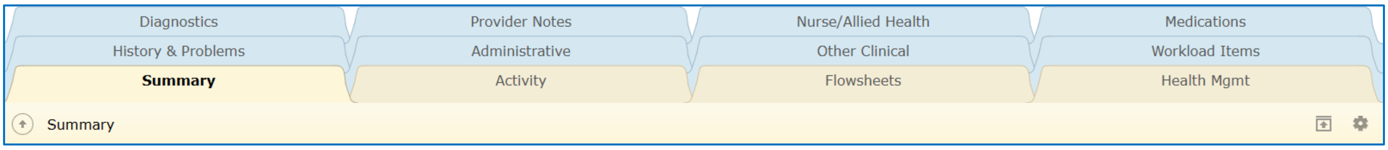
From the **CWS Scheduler Desktop**, you can then access the patient's chart by choosing the **EMR** – “Electronic Medical Record” function from the **Function Menu**.

Introduction to EMR - "Electronic Medical Record"

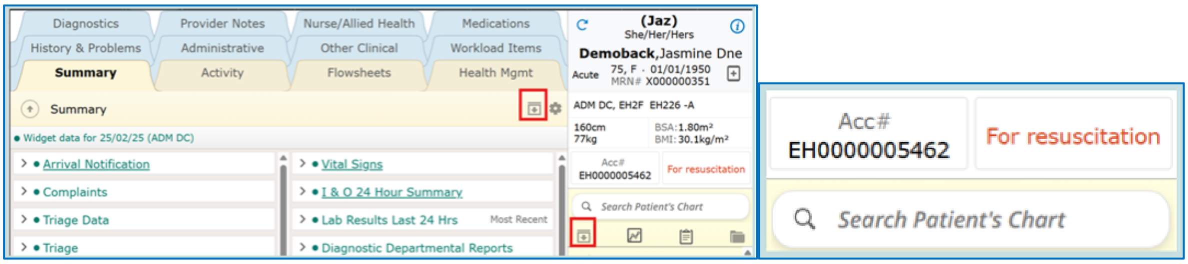
Once you have clicked **EMR** on any patient record, you will be taken to the below:



This contains several subcategories of the patients EMR including:



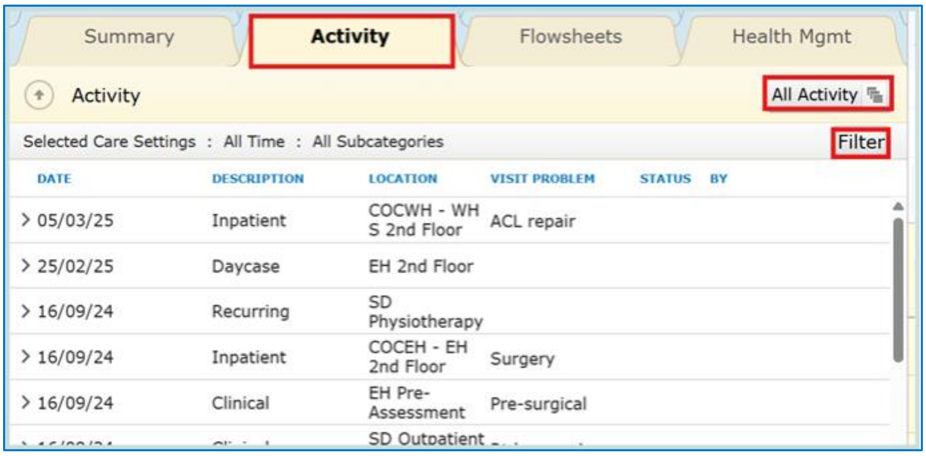
Next, The **Search Patient Chart** feature functions like a personal search engine within the patient's chart to locate specific results or reports.
The **Accordion** or **Expand button** allows users to **collapse** or **expand all widgets** to either **view** or **hide content**. This button is available 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**.



- **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

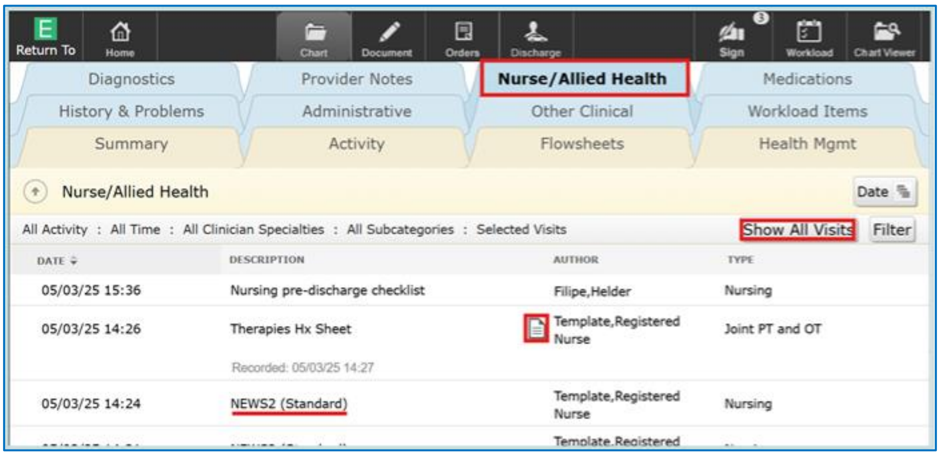
- **History & Problems:** Use the History and Problems page to view a patient's active, current, and past problems.

- **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.

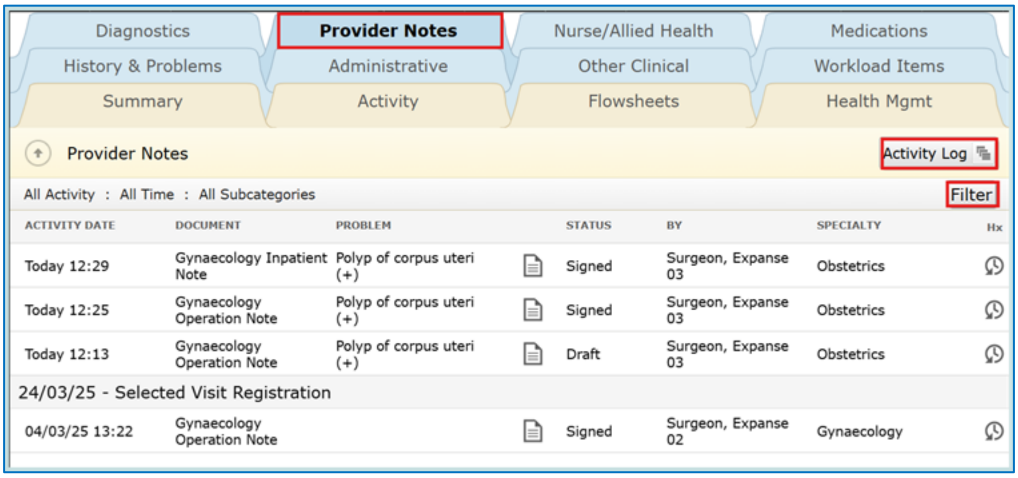
- **Medications**: Use this page to view a patient's medications.

- **Nurse/Allied Health:**



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:**

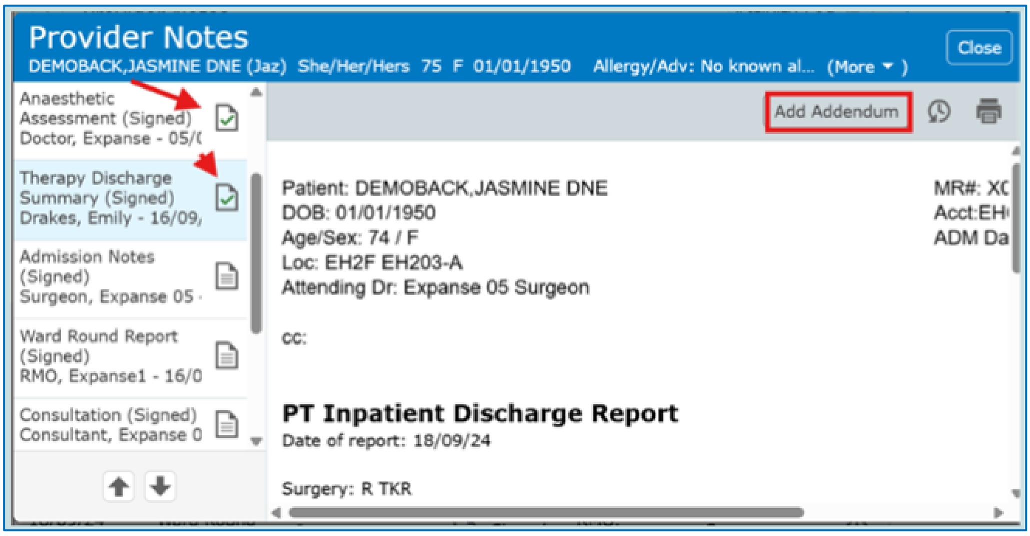


The **Provider Notes tab** contains clinician-entered patient documentation, including **notes and letters for inpatients.**

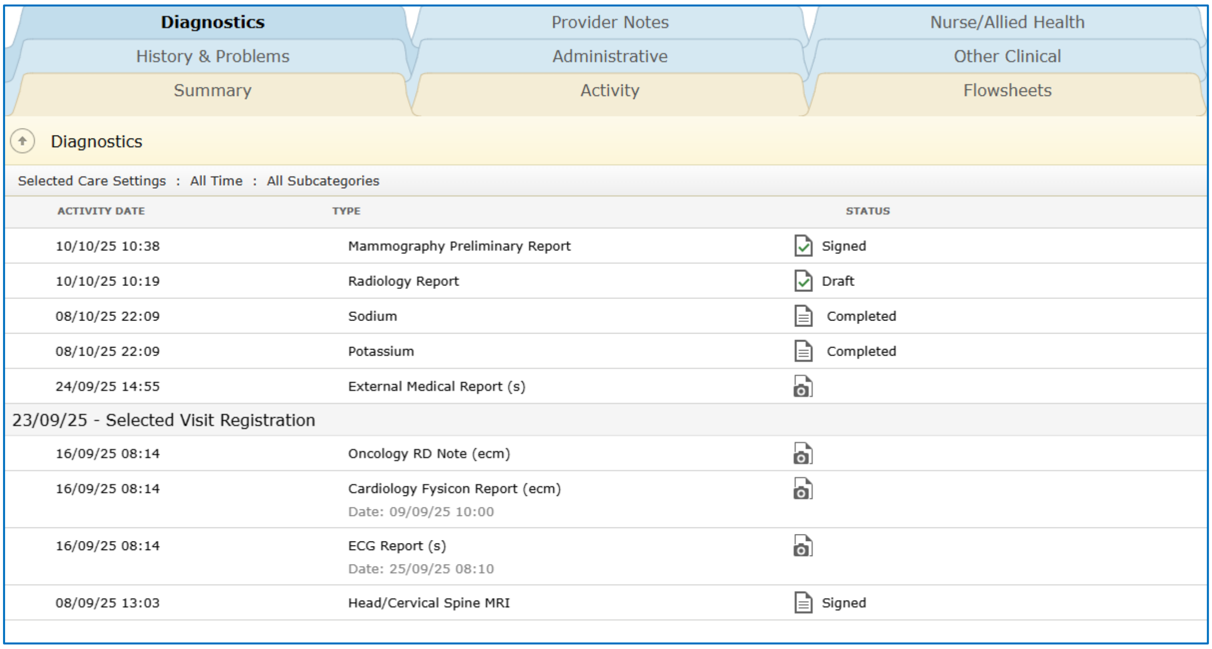
It displays details such as **activity date, document type, problem, status, and author**. Notes may have statuses like **Viewable, Signed, Draft or Cancelled**, with icons which if you click will display the document.

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

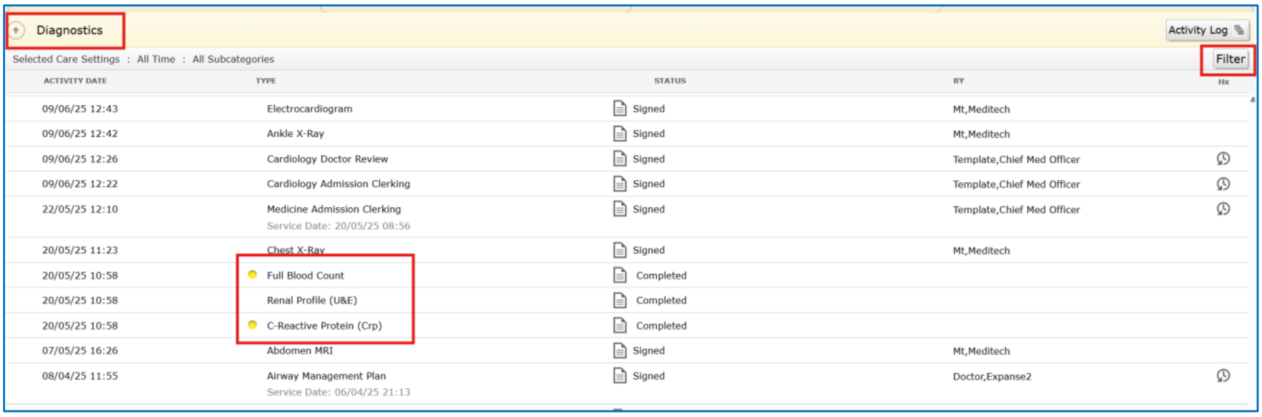
Documents with Addendums: Once an addendum has been added to a signed-off note, the system will indicate this change (including dates and descriptions). After the addendum is signed, users can return to the Provider Notes tab and view the original document; the Addendum will be clearly displayed at the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



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) Date: 09/09/25 10:00	
16/09/25 08:14	ECG Report (s) Date: 25/09/25 08:10	
08/09/25 13:03	Head/Cervical Spine MRI	Signed



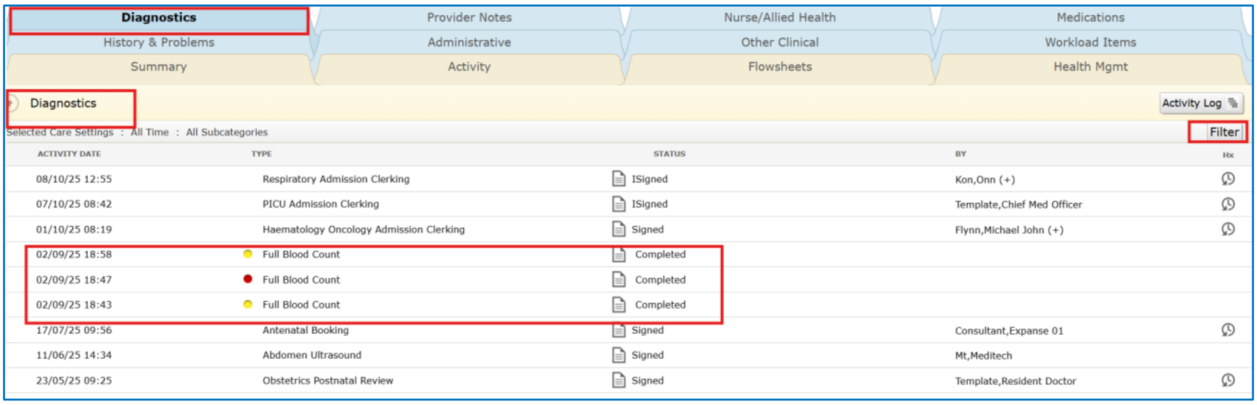
Diagnostics

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 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 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

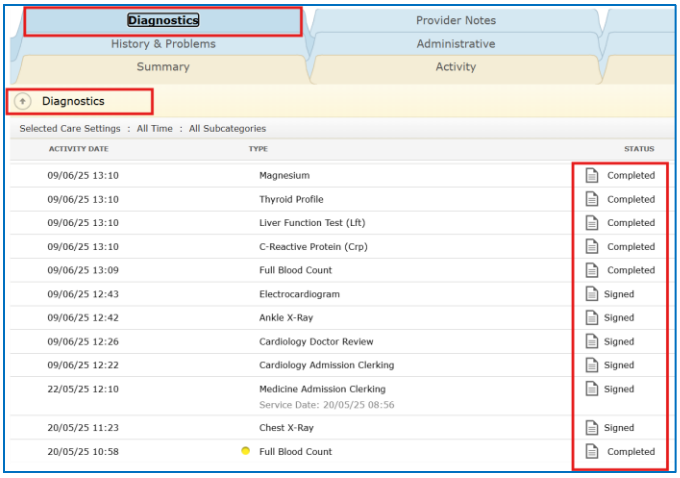
Filter

ACTIVITY DATE	TYPE	STATUS	BY	Hx
08/10/25 12:55	Respiratory Admission Clerking	ISigned	Kon,Onn (+)	
07/10/25 08:42	PICU Admission Clerking	ISigned	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.



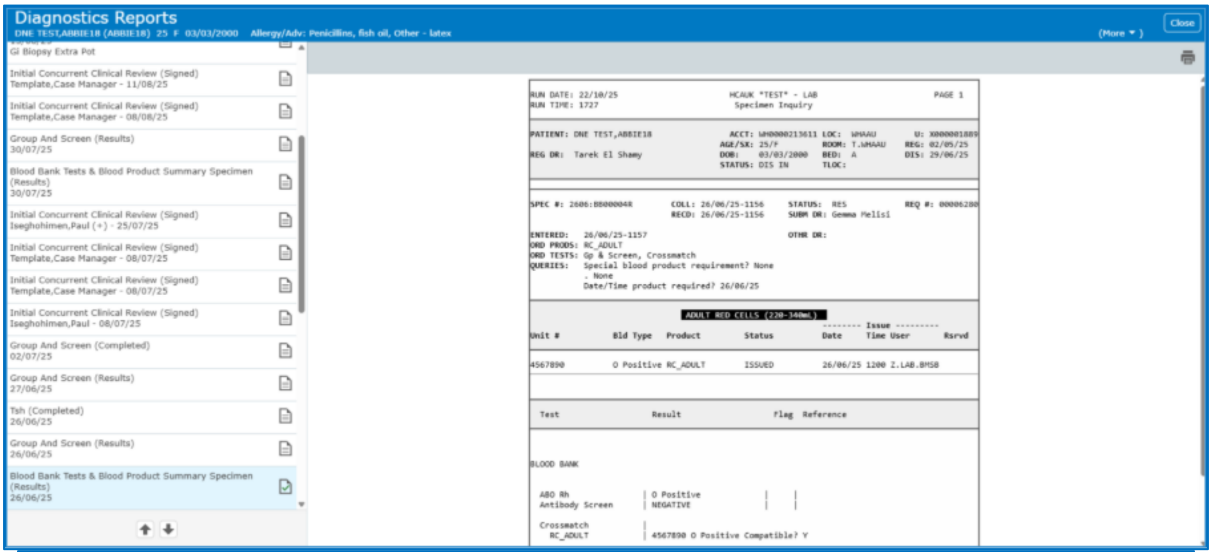
Diagnostics | Provider Notes
History & Problems | Administrative
Summary | Activity

Diagnostics

Selected Care Settings : All Time : All Subcategories

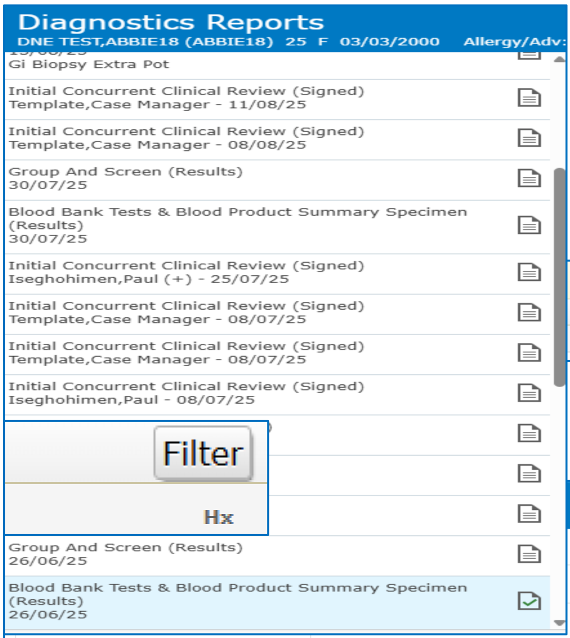
ACTIVITY DATE	TYPE	STATUS
09/06/25 13:10	Magnesium	Completed
09/06/25 13:10	Thyroid Profile	Completed
09/06/25 13:10	Liver Function Test (Lft)	Completed
09/06/25 13:10	C-Reactive Protein (Crp)	Completed
09/06/25 13:09	Full Blood Count	Completed
09/06/25 12:43	Electrocardiogram	Signed
09/06/25 12:42	Ankle 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 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.

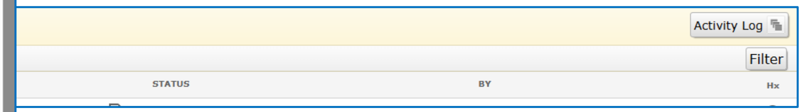


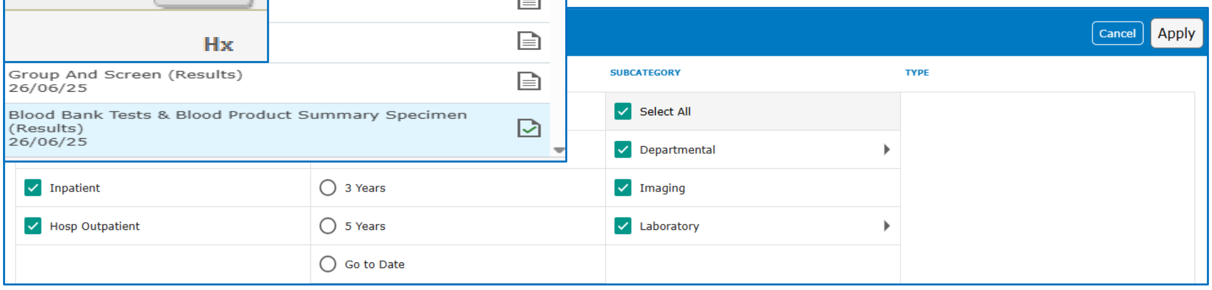
TYPE	STATUS
Mammography Preliminary Report	Signed
Radiology Report	Draft
Sodium	Completed
Potassium	Completed

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



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

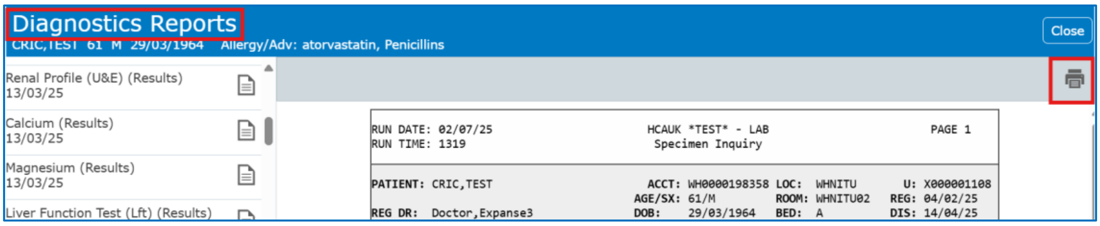




Tick the options you desire under each section (**"Care Settings", "Time Frame" & "Subcategory")** and then click **Apply**

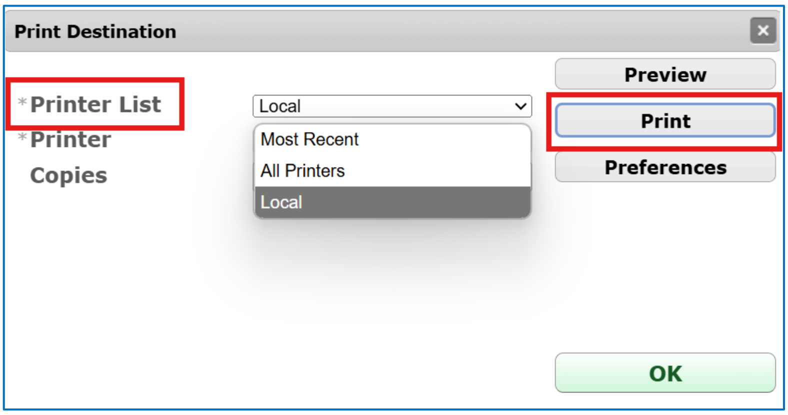
How to Print & Download Diagnostic Reports

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

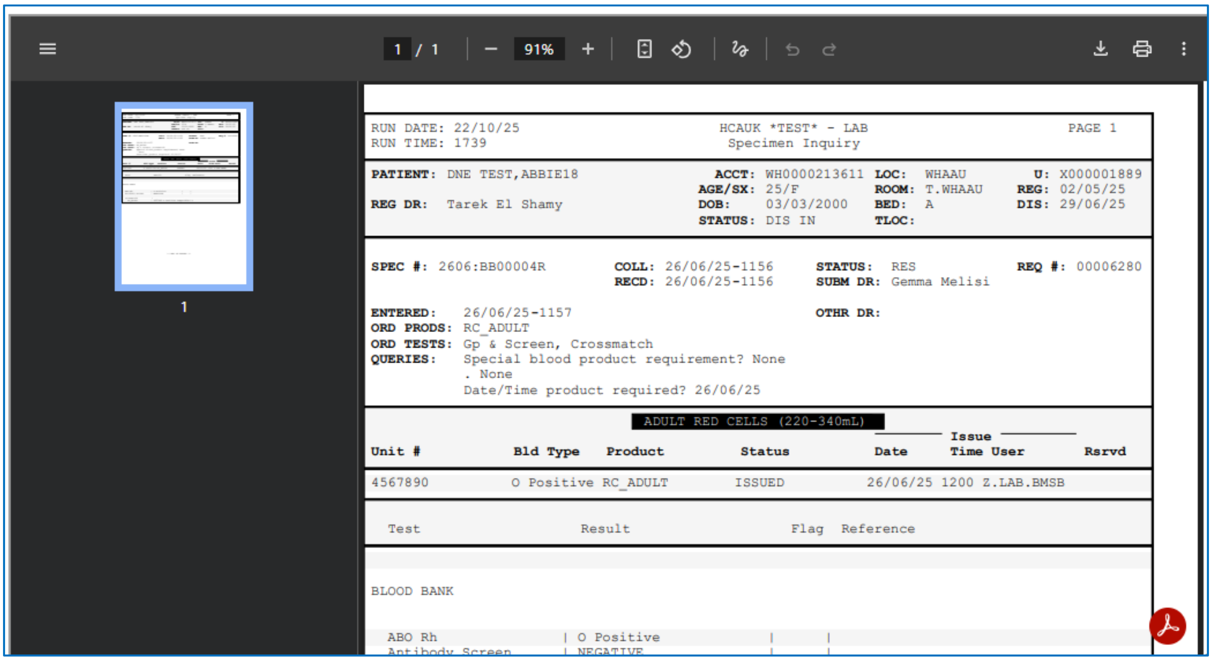


Now that the **Print Destination** window is displayed:

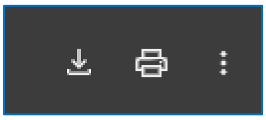
- **To print the document:**
    - Click the **print** button,
    - Then select the **desired printer,**
    - Click how many copies required
    - and **OK** to print the report.



- **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

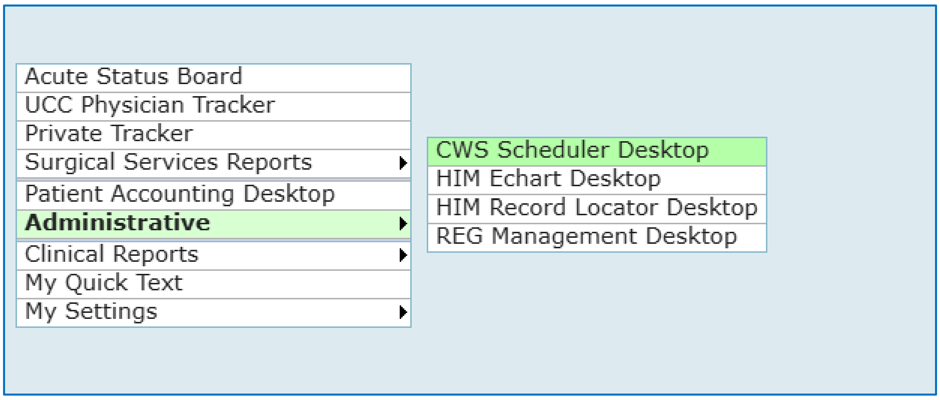


- Then a new box appears, where you can download using the save button in the top right hand-corner.

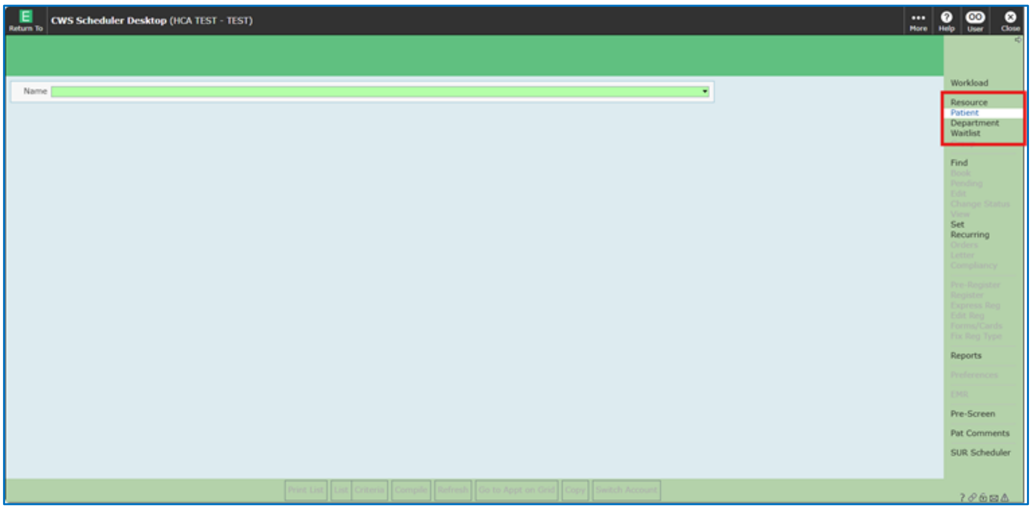


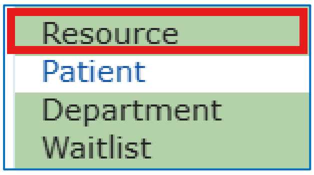
Introduction to Resource Mode

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

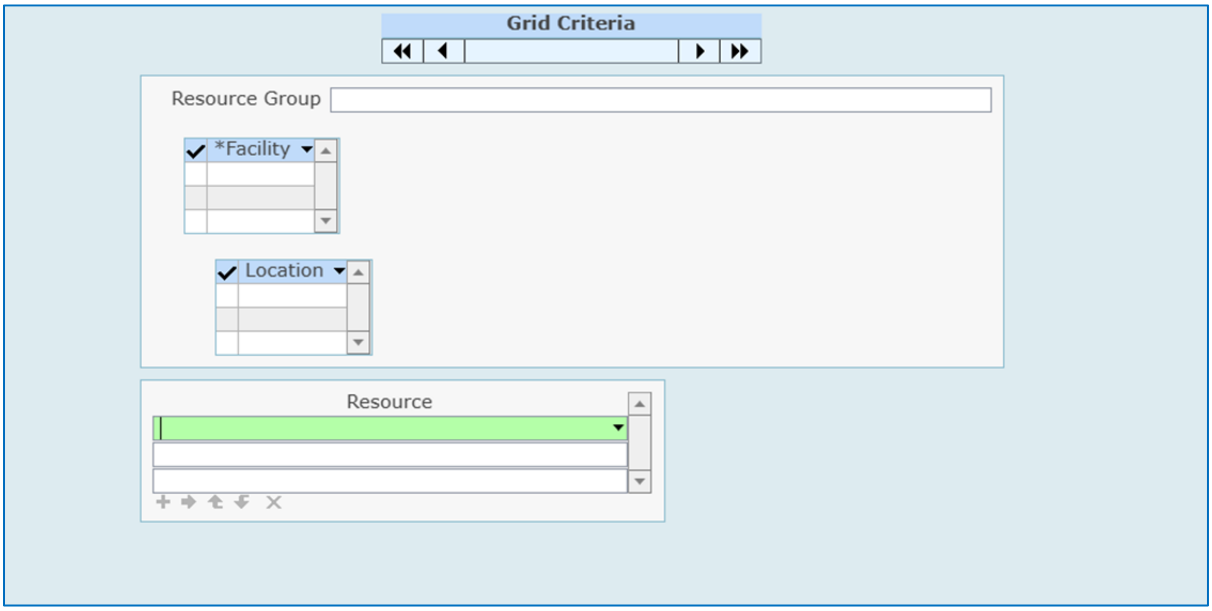


We've now arrived at the CWS scheduler desktop. On the Functions menu, it defaults to "**Patient**" mode, which lets you search for a specific patient and book the appointments through the patient but since you'll be looking at the consultant's diary, click on the "**Resource"** button

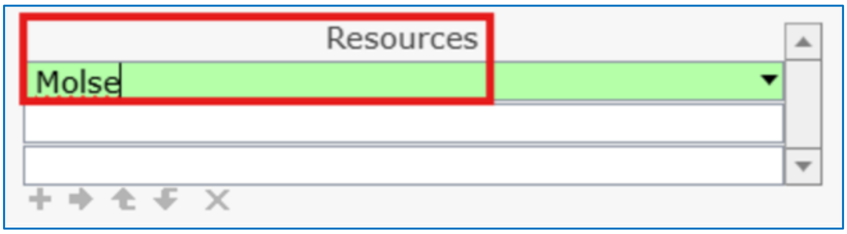




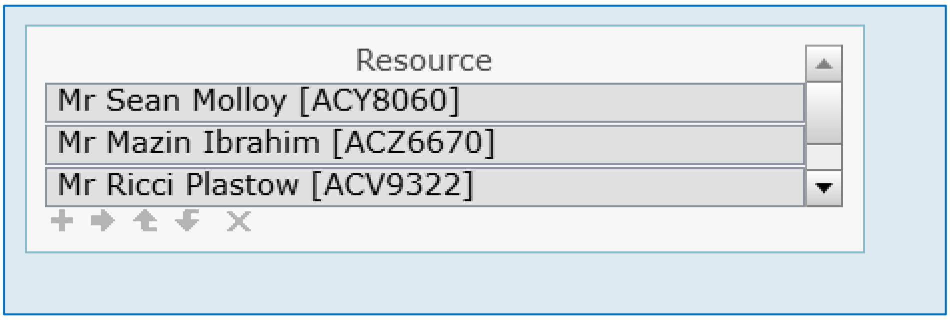
After selecting the **Resource function**, you'll be taken to the **Resource Group screen**. Currently, there isn't anything assigned to this user yet. Each user can customize and define what they would like to display.



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

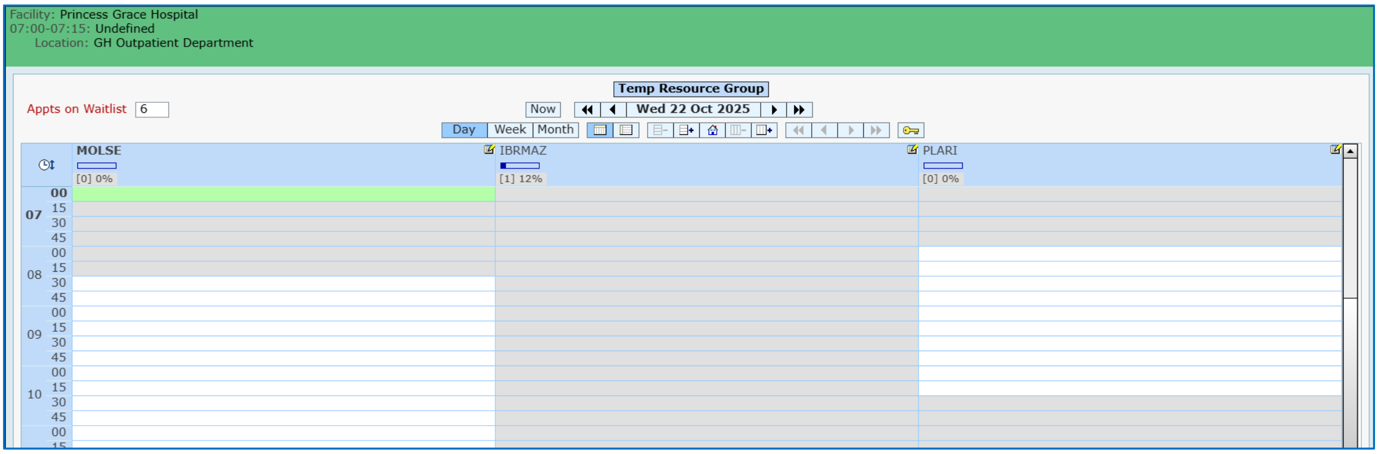


If you manage multiple consultants, you can add several consultants which will look as below:



Click **OK.**

This will take you automatically to the below screen

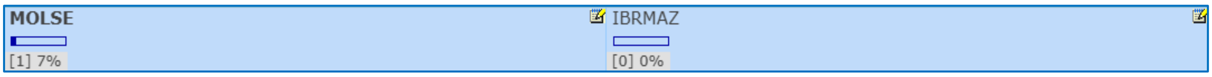


Key Notes

- Grey shaded areas, are blocked areas and unable to be booked into (without editing the session, locally).

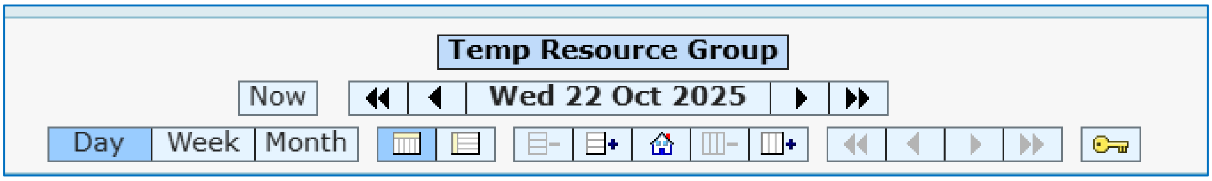
- White areas are the available slots that can be booked into.

- When looking after multiple consultants - The mnemonic that is **bold,** is the consultant that you are currently focused on

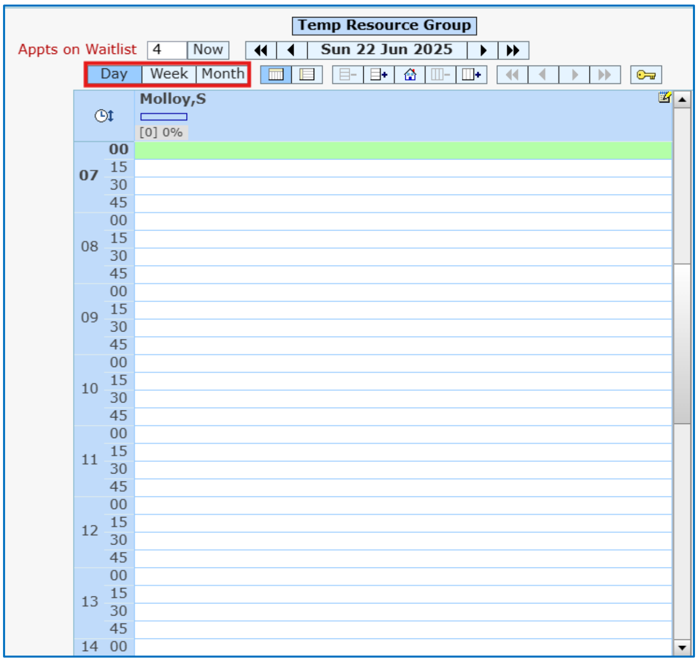


- > = the next day
- >> = the next week from the date you are on.
- < = the previous day
- <<= the previous week from the date you are on.

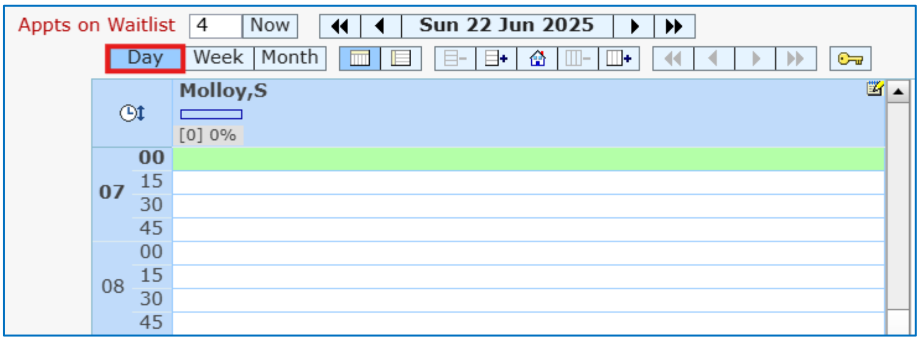
Understanding Resource Mode Details



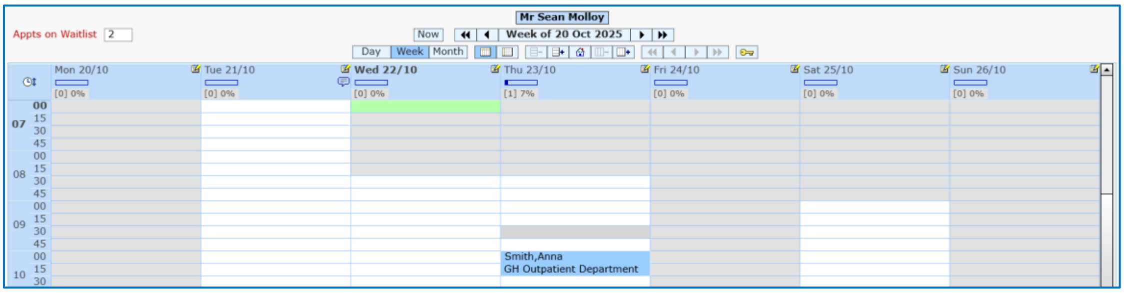
The above shows the date, and you can view the **diary** in either a **day, weekly or monthly** view.



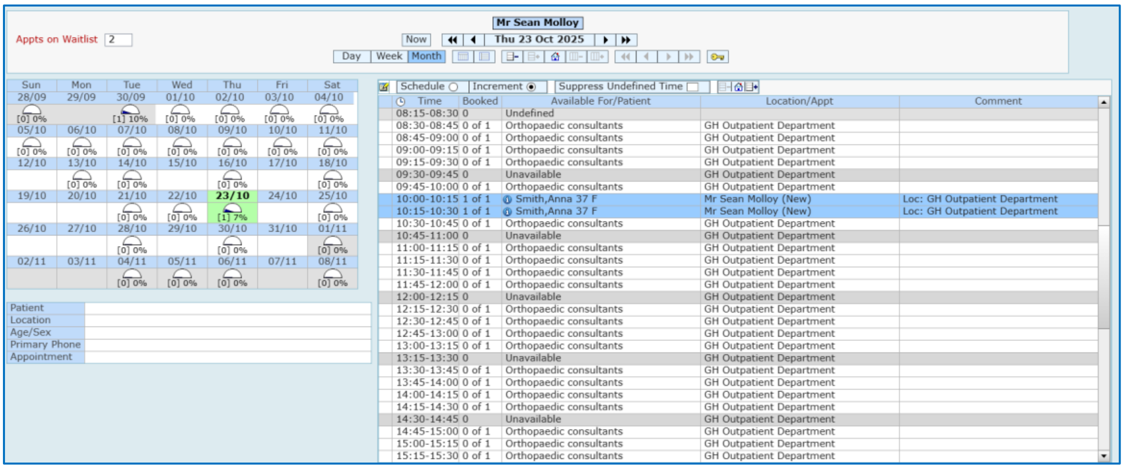
Day View



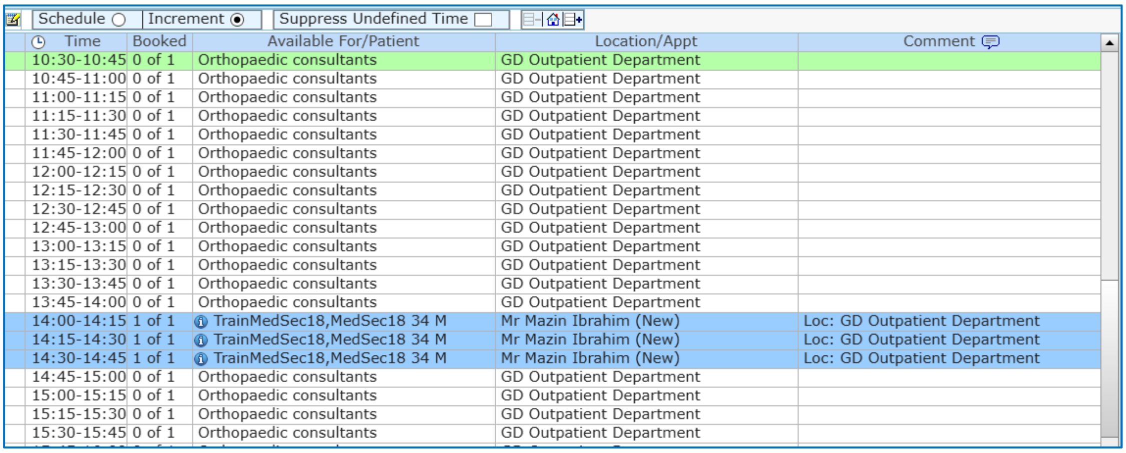
Week View



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



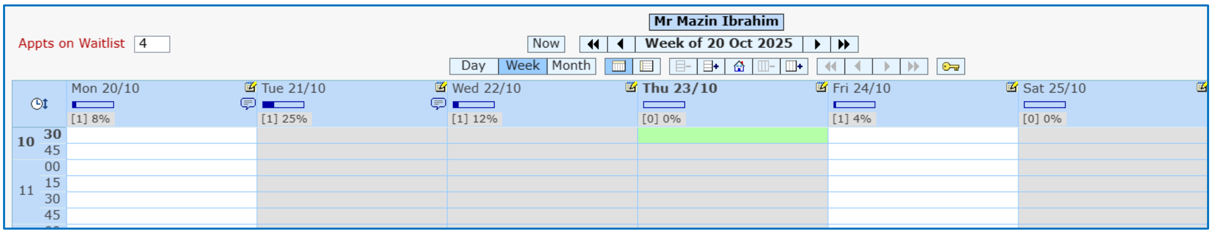
you can also see the list of available times and any booked appointments.



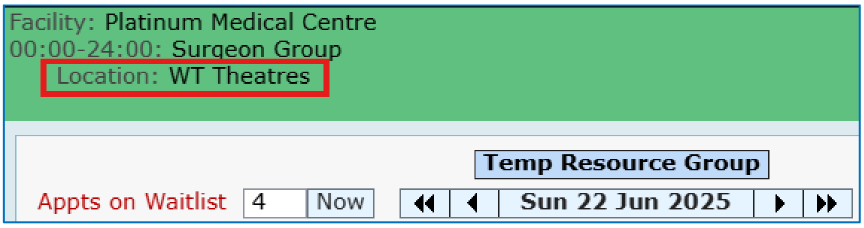
Time	Booked	Available For/Patient	Location/Appt	Comment
10:30-10:45	0 of 1	Orthopaedic consultants	GD Outpatient Department	
10:45-11:00	0 of 1	Orthopaedic consultants	GD Outpatient Department	
11:00-11:15	0 of 1	Orthopaedic consultants	GD Outpatient Department	
11:15-11:30	0 of 1	Orthopaedic consultants	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:

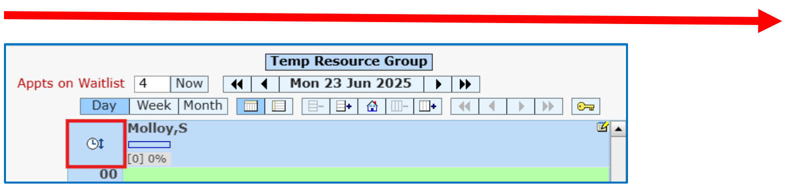
- Click back on view **"day"** view
- Then click the other consultant (either on their mnemonic or in the diary for that consultant) ensuring the focus changes to the other consultant.
- Then you can click the **"Week"** or **"Month"** view for that consultant.

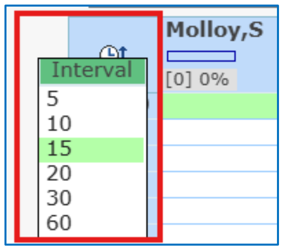


From the diary, we can also see which **facility** the doctor will be at – ***at the top left of the screen.***

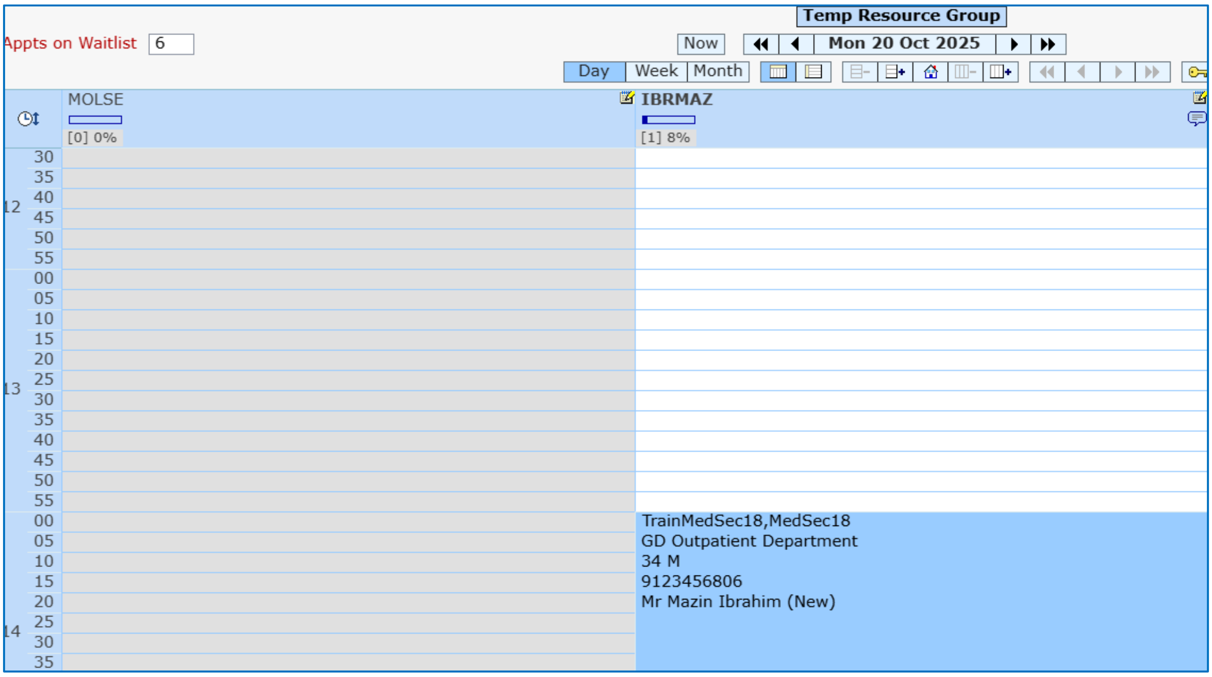


You can filter the schedule to show appointments at specific intervals, such as every 15 minutes - By clicking on the **clock with the up and down arrow** on the left side of the schedule.

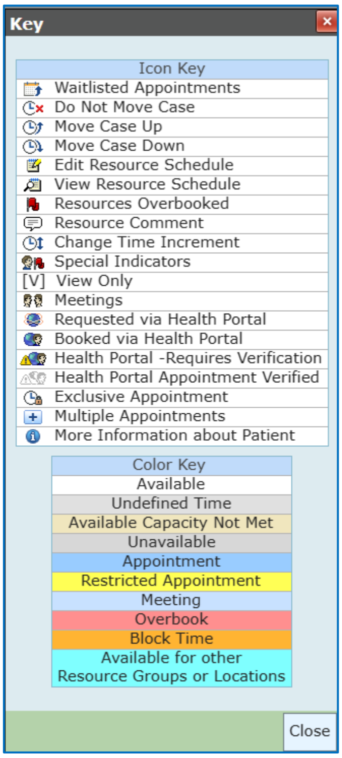


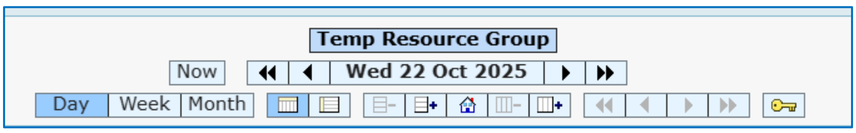


- NB. Viewing the appointments in intervals of “5 minutes” will allow you to see all the patient details that have been booked into the diary



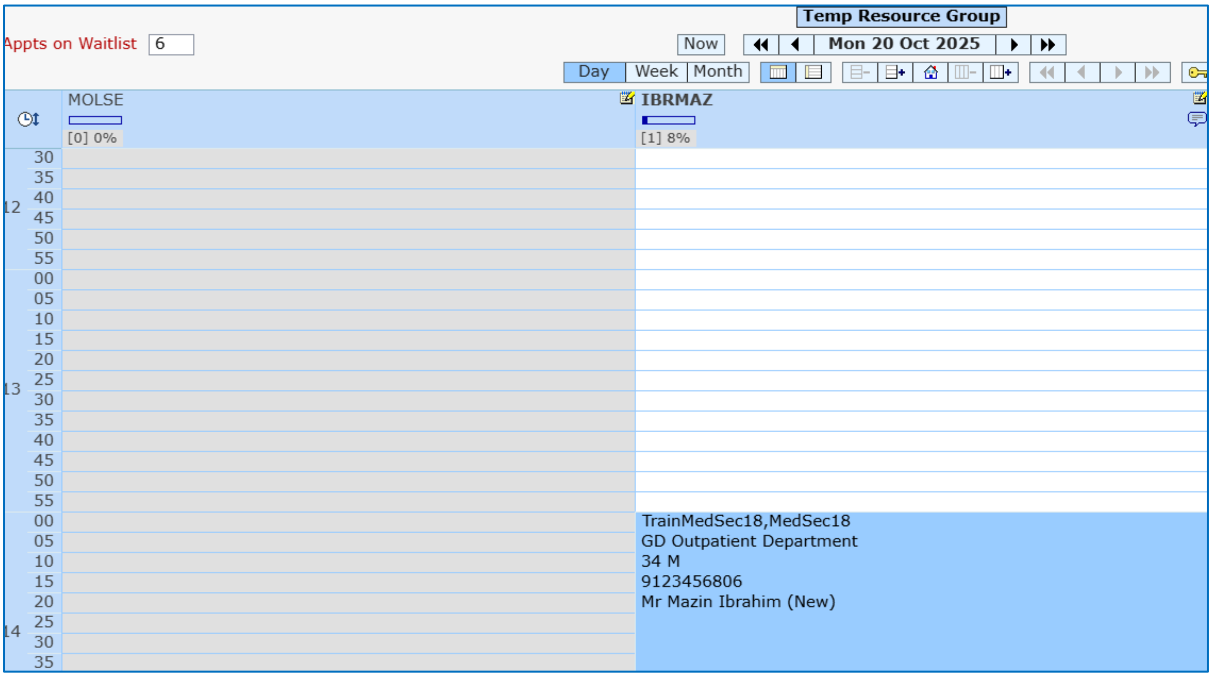
On the main resource mode, you will have a key icon – which will identify the colour and icon keys – including their meanings:



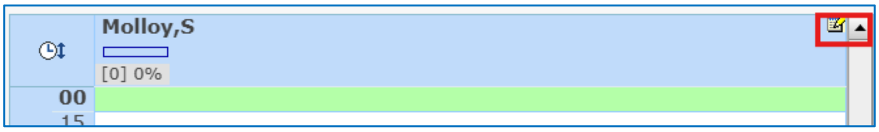


How to Open An Adhoc Clinic Session

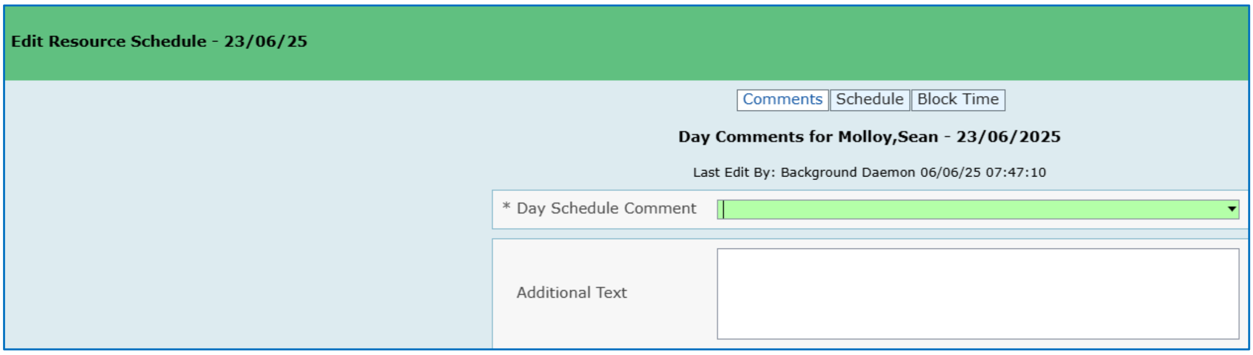
Looking at the below diary, the shaded grey section for the mnemonic "**MOLSE**" shows the appointments are unavailable to be booked into:



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

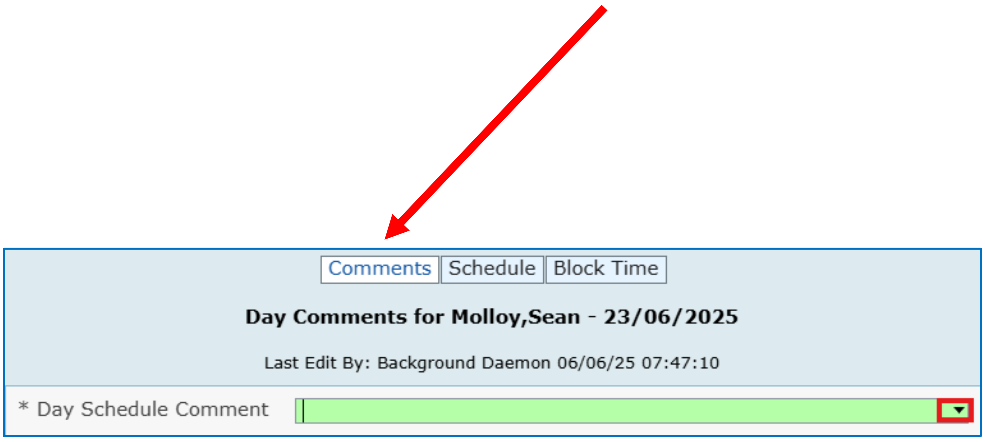


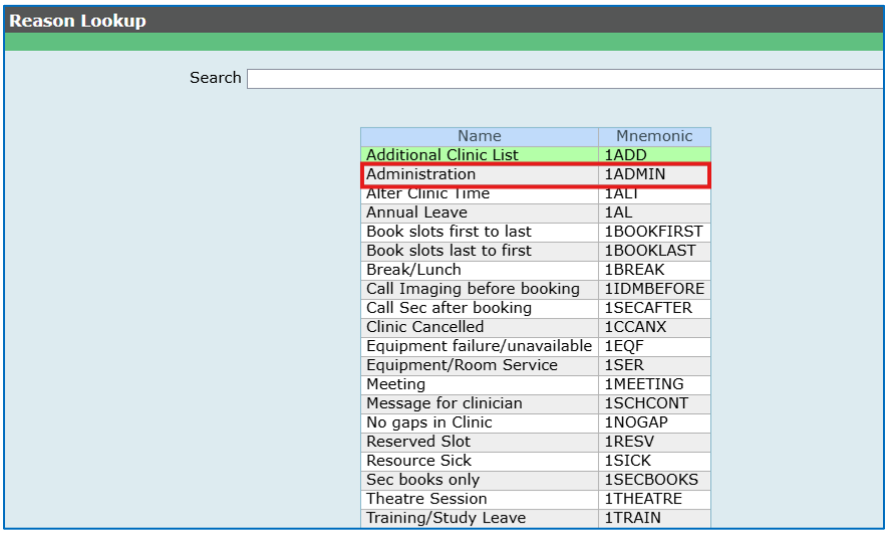
This will open the **Edit Resource Schedule window**.



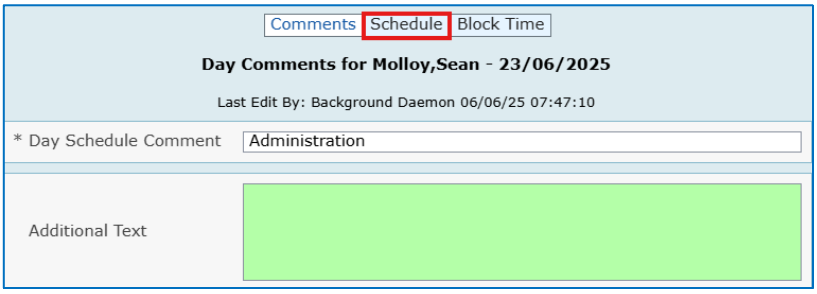
To complete any local edit, it is compulsory that a reason is entered into the **Day Schedule Comment** field.

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



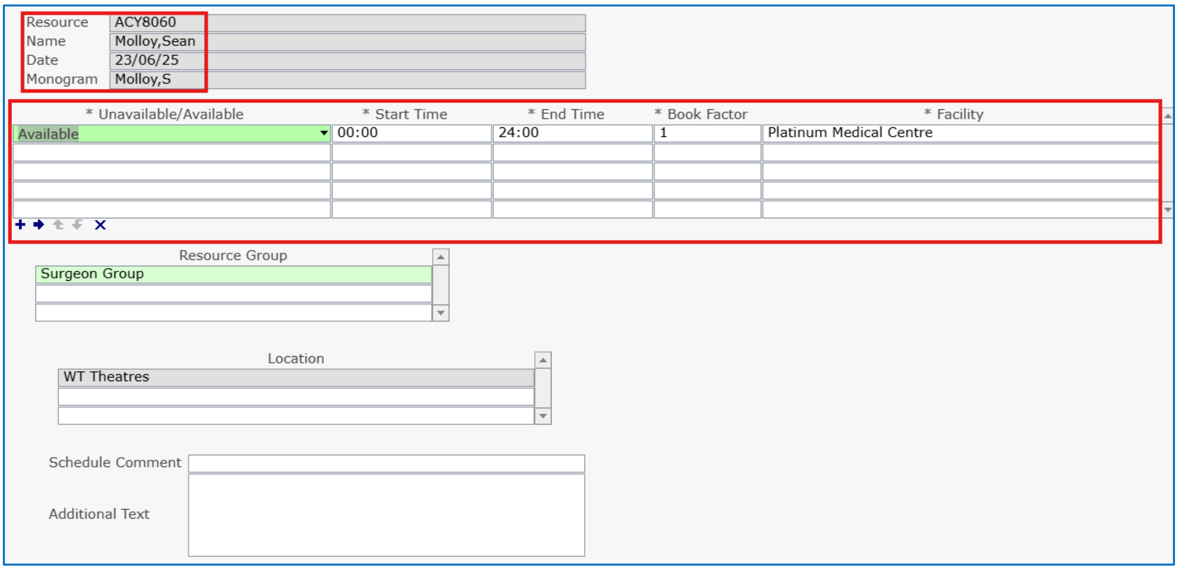


Next, select the **Schedule** tab.

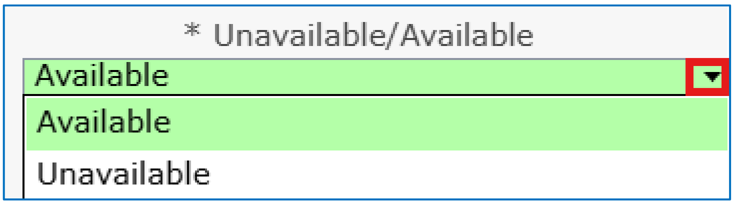


In the **Edit Resource Schedule** window, you can view the resource's details.

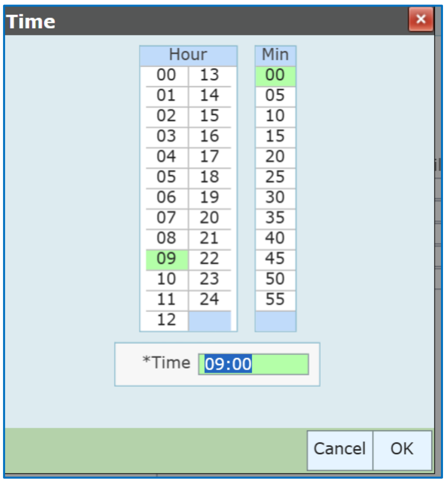
Additionally, there is the second grid that requires the availability information.



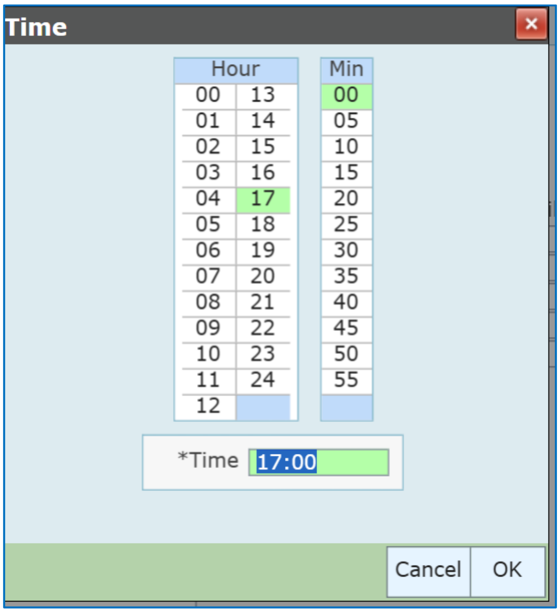
- **Within the first category: Unavailable/Available field**; Use the **Lookup** arrow to choose the "**Available**" option.



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

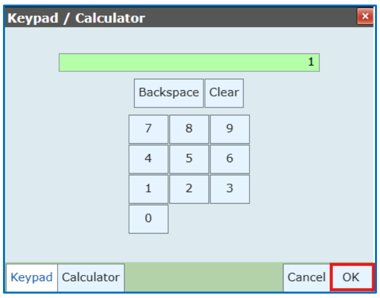


- **End Time field**; Use the **LookUp** arrow to open the Time gride - You can now enter the time using the **24-hour format** and click **OK**.



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** gride – Enter **1** and click **OK**.



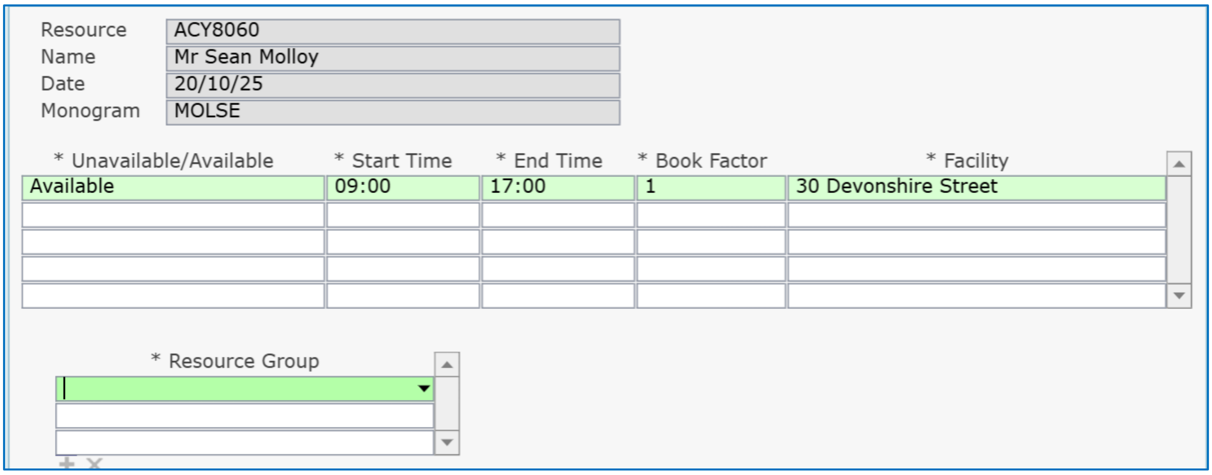
Facility field; Use **the Lookup** arrow to open the **Facility LookUp** window and select the appropriate Facility.

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	COCGE	UKHIM	GE
Harley Street Clinic	COCHS	UKHIM	HS
HSC @ Devonshire Outpatients	COCHV	UKHIM	HV
Inst of Sports & Exercise Hlth	COHGS	UKHIM	GS

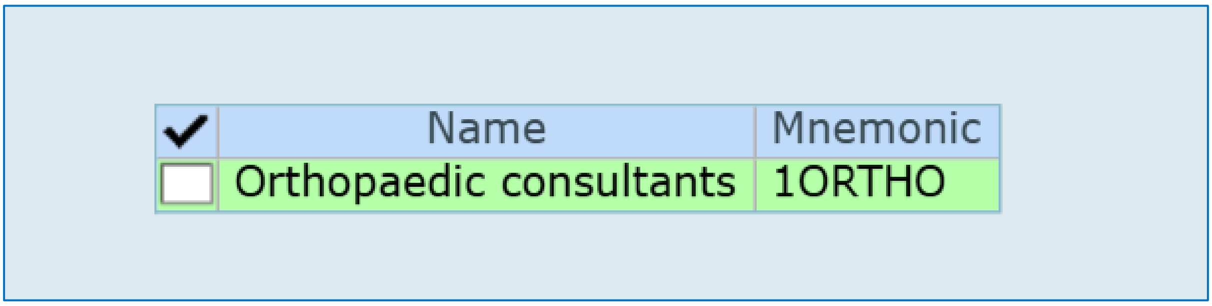
In this example, we would select the below facility:

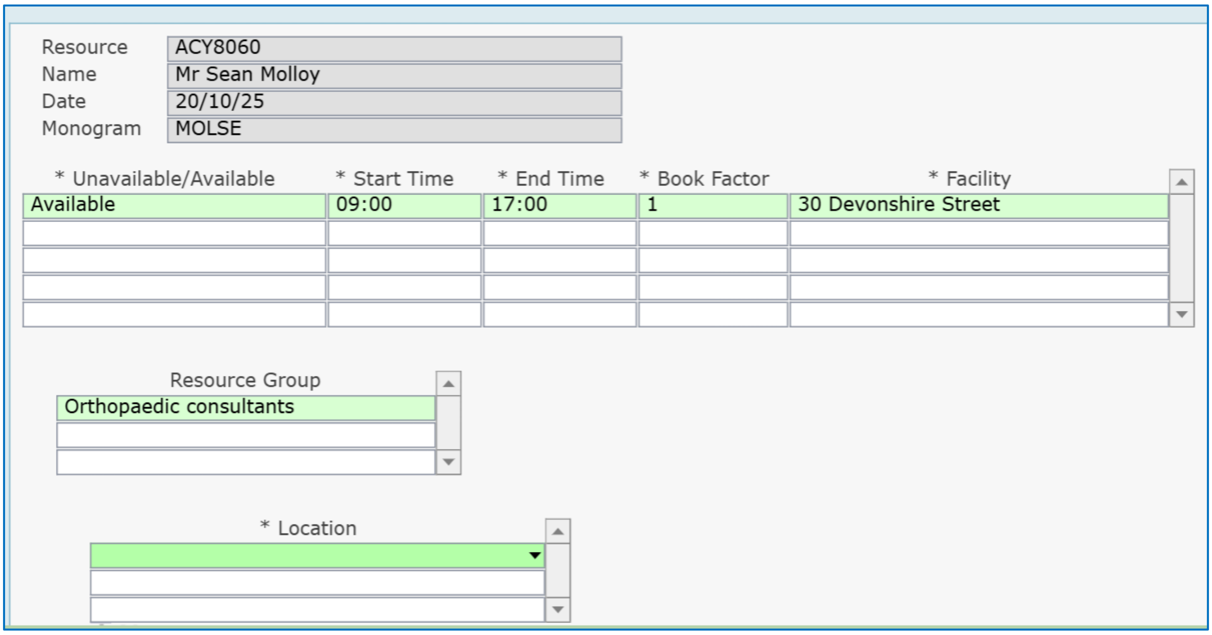
Name	Mnemonic	Him Dept	Acct # Prefix
30 Devonshire Street	COCGD	UKHIM	GD
272 Kings Road Diag & Otpts	COCTK	UKHIM	TK
Battersea & Nine Elms Otpts	COCTE	UKHIM	TE

Next, you will need to confirm Resource Group field;

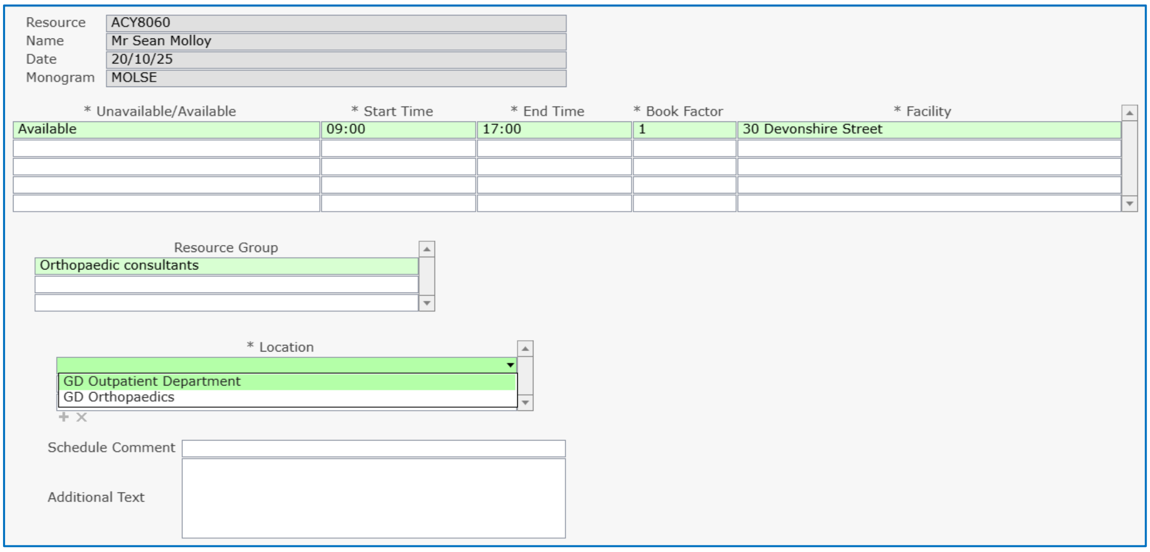


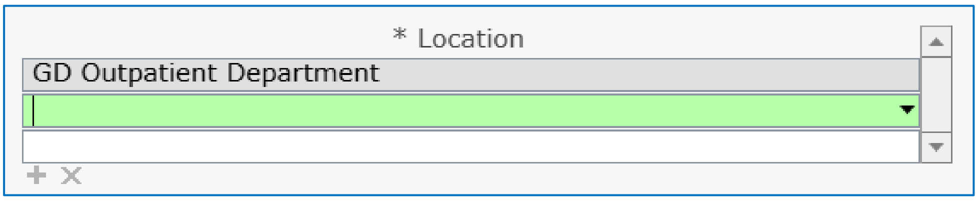
Select the **Lookup** arrow, to open the **Resource Lookup**, then Fill in the **Resource field** as required: (in this example, it would be “**Orthopaedic Consultants**”)



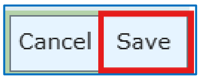


Next, Use the **Lookup** arrow, to open the **Location Lookup**, to choose the **location**.

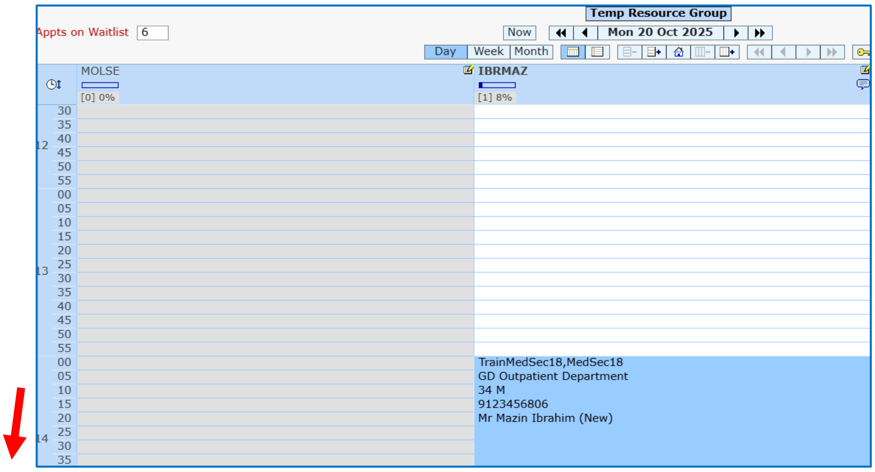


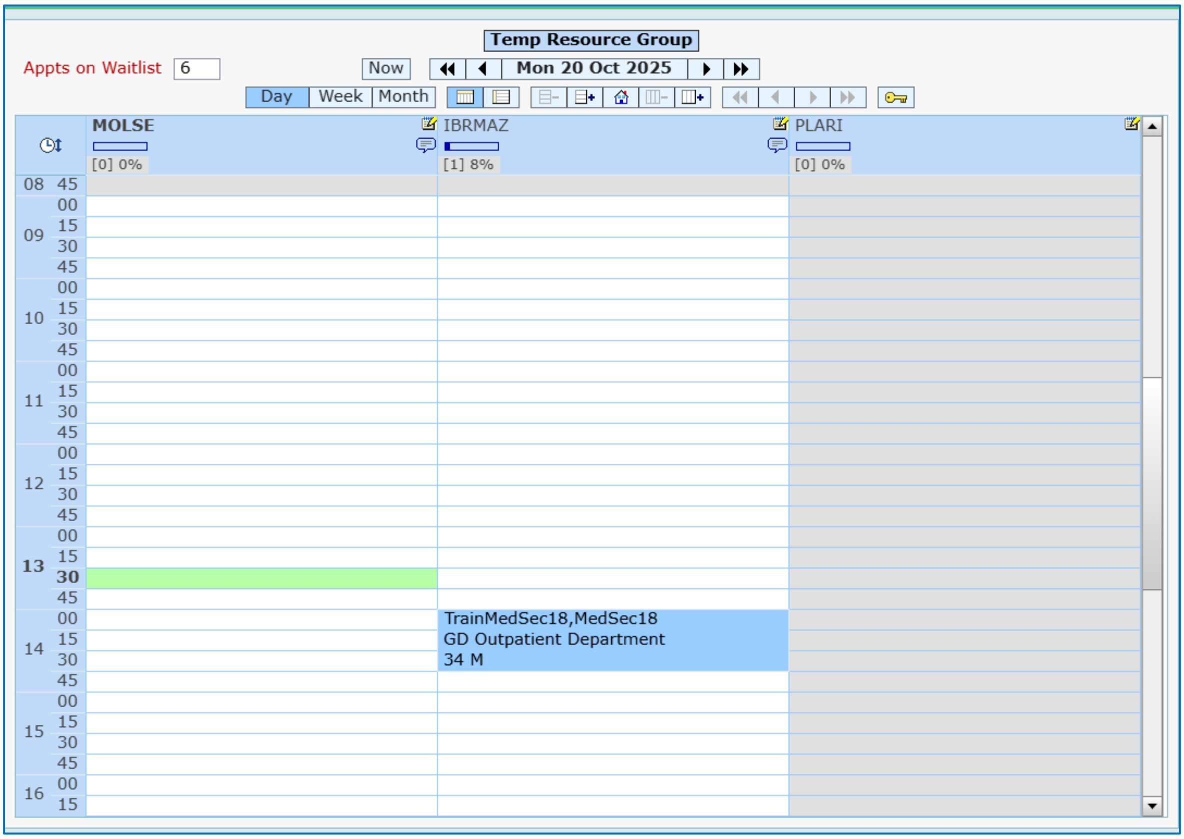


Click **Save**.



The schedule is now available.



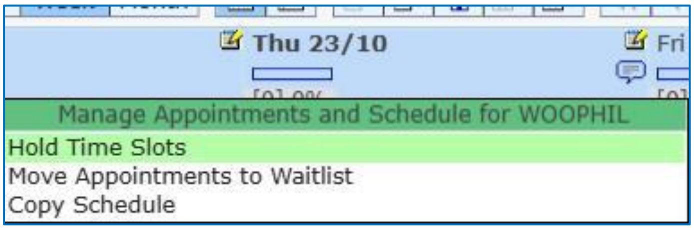


NB: This is an example of an ad-hoc diary change, permanent changes will need to continue to be raised by Service Now tickets or via the Contact Centre Team.

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)

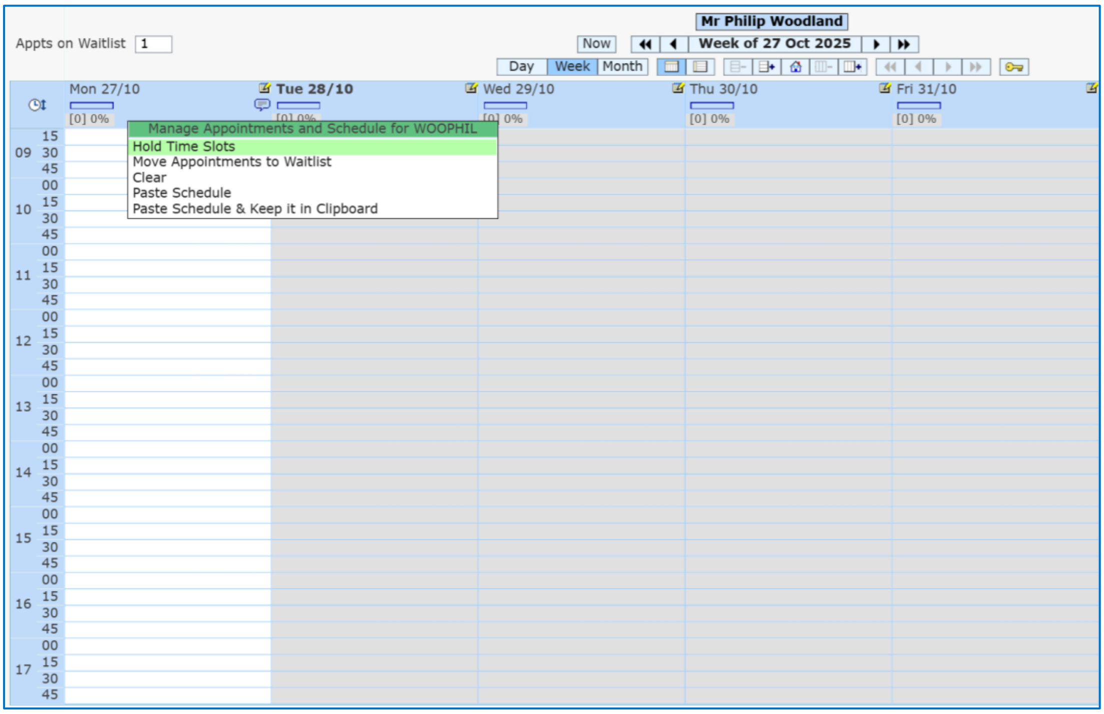
This will bring up the below box:



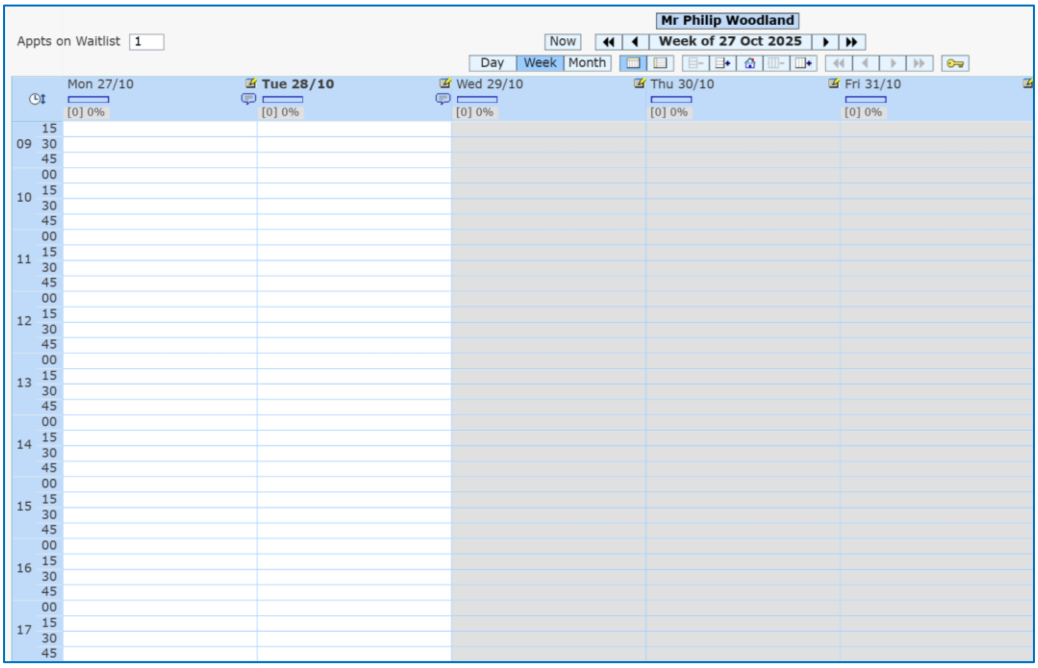
Click **Copy Schedule**

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.

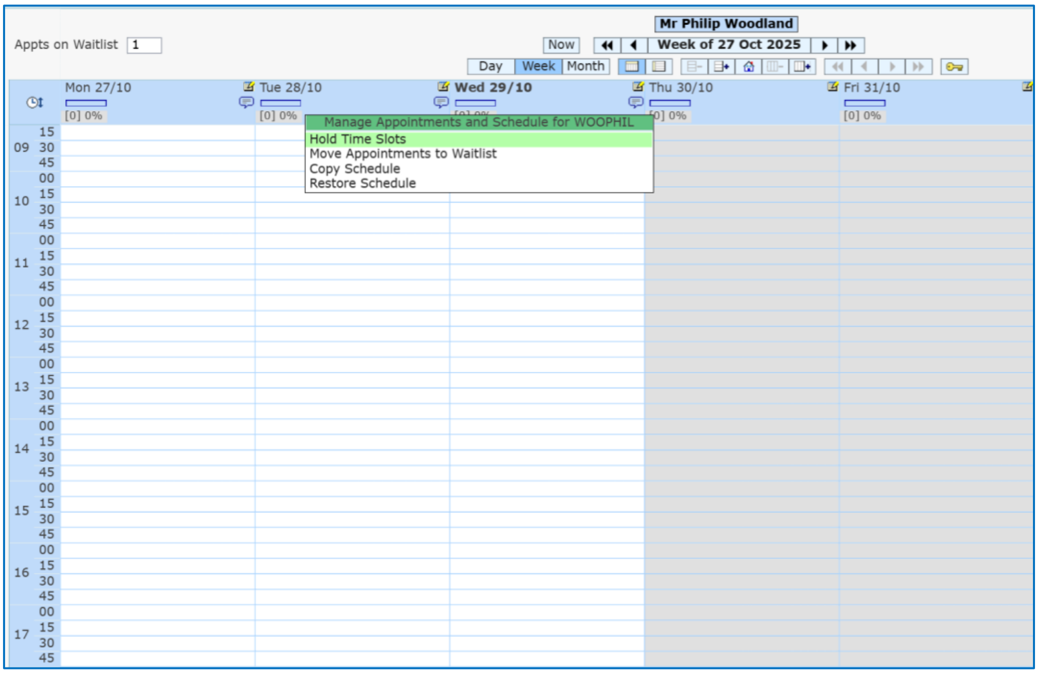


You can see that we have now copied the schedule to “Tuesday” in the below:



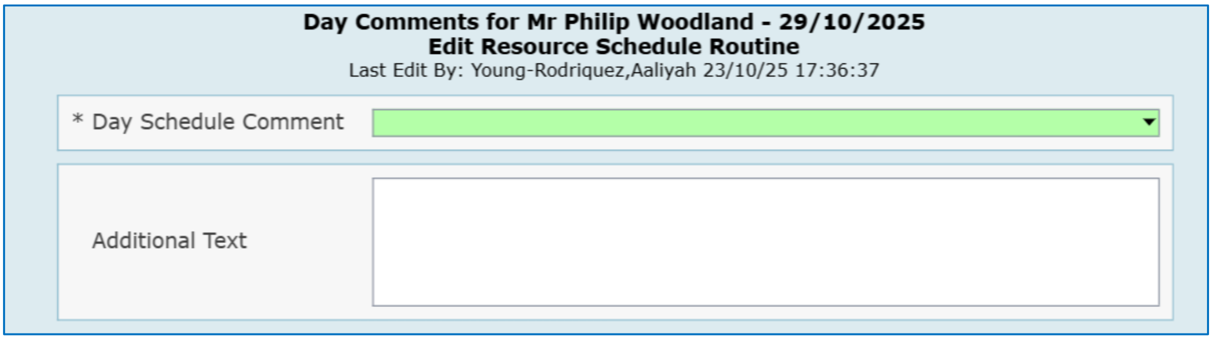
You can see now that the schedule has also been copied to “Wednesday”.

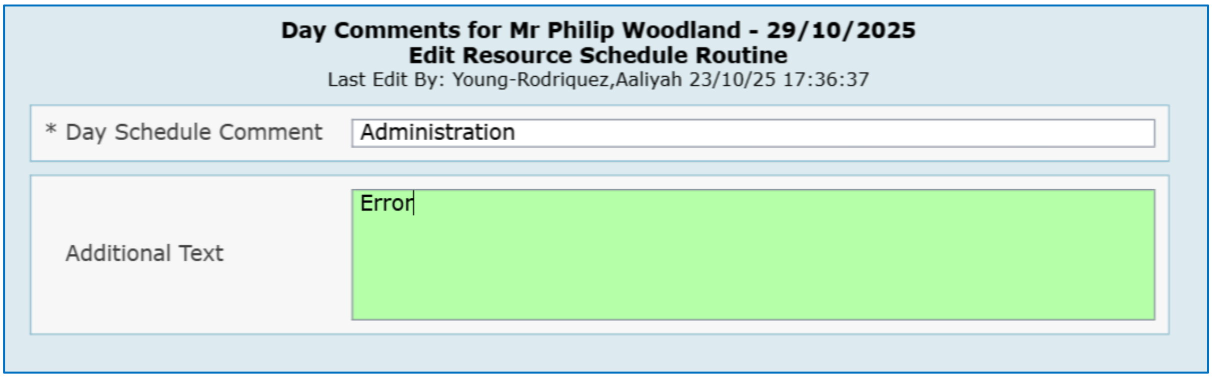
However, if for example this was done in error – you can right click on the **Percentage** and click **Restore Schedule.** This will take the schedule back to what it was previously



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

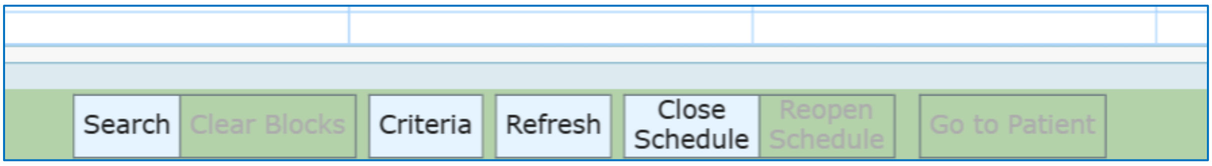
Click, the **Lookup Arrow Function,** to select a **mandatory comment** and then you can enter **additional free type text** for any further information.

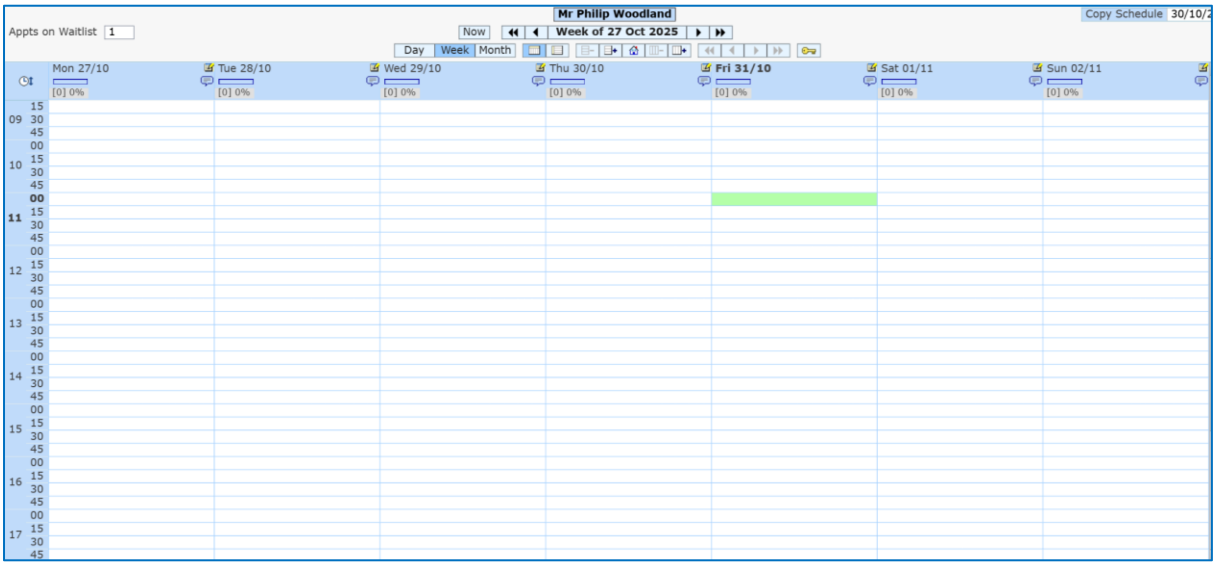

Day Comments for Mr Philip Woodland - 29/10/2025
Edit Resource Schedule Routine
Last Edit By: Young-Rodriquez,Aaliyah 23/10/25 17:36:37
* Day Schedule Comment
Additional Text

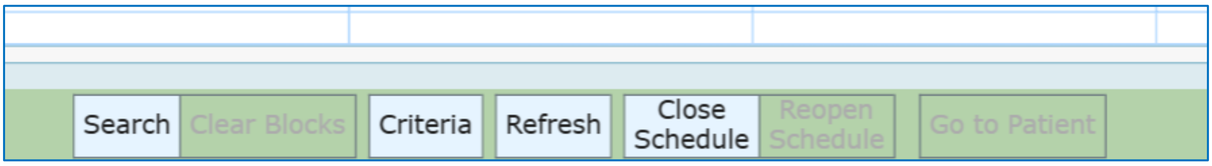

Day Comments for Mr Philip Woodland - 29/10/2025
Edit Resource Schedule Routine
Last Edit By: Young-Rodriquez,Aaliyah 23/10/25 17:36:37
* Day Schedule Comment
Administration
Additional Text
Error

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.

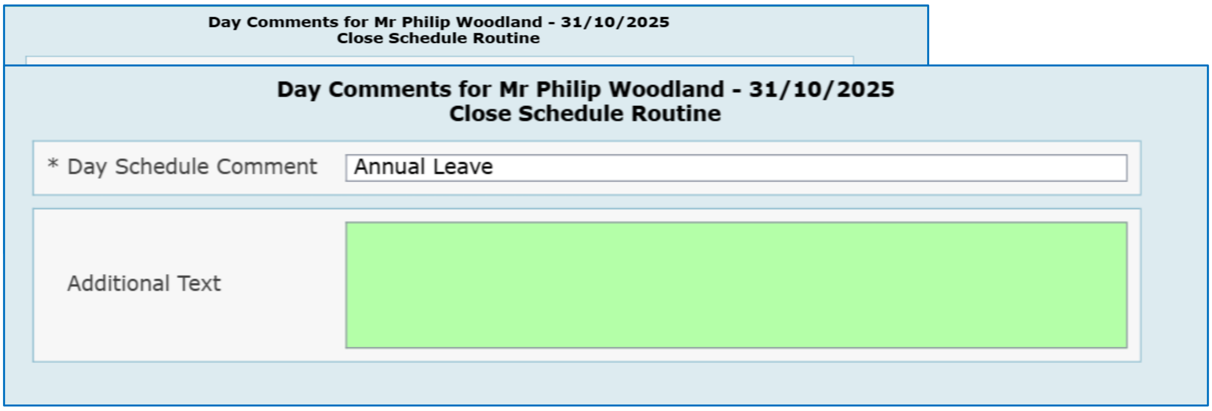




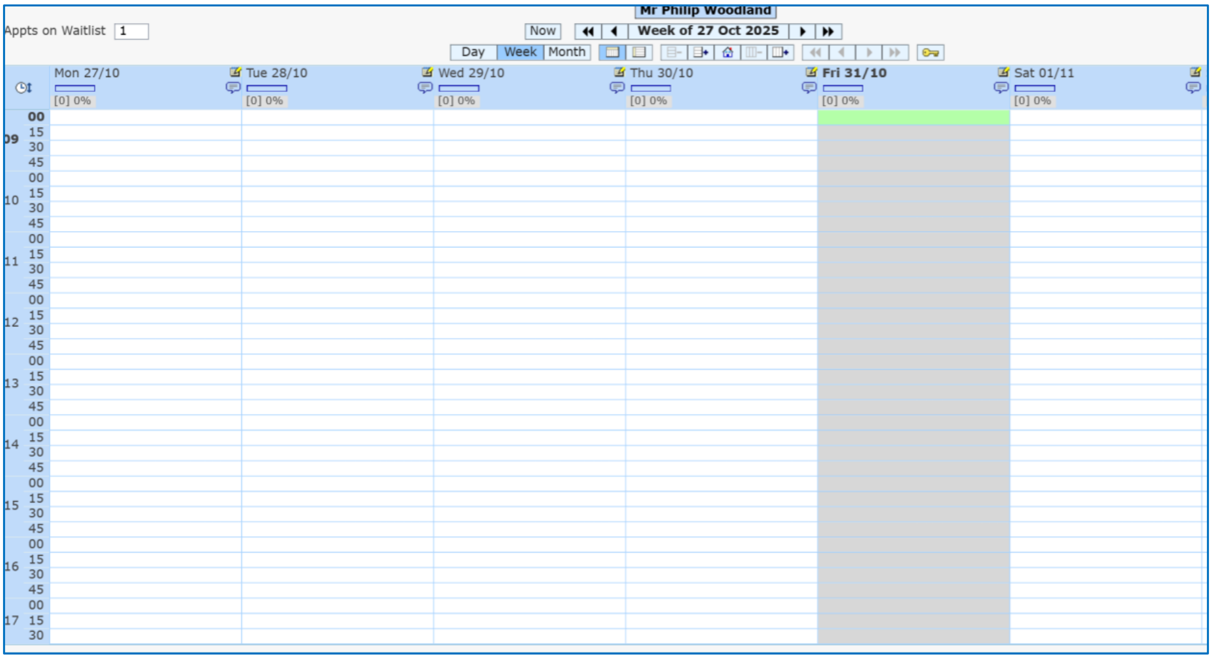


Click the day that you want to close, so there is a green bar in the day. Then click **Close Schedule.**

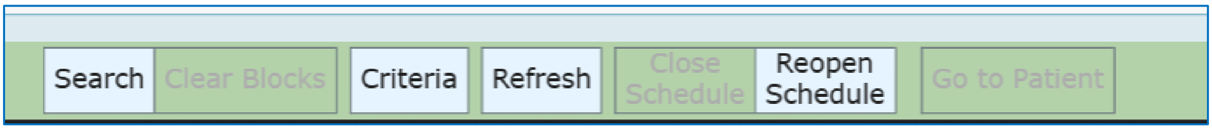
Next you will see the below, where you will need to **enter** a **Day Schedule Comment**



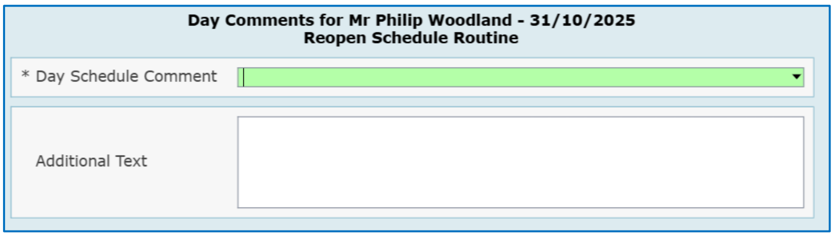
You can see that the Friday session 31st October 2025, is now closed.



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.

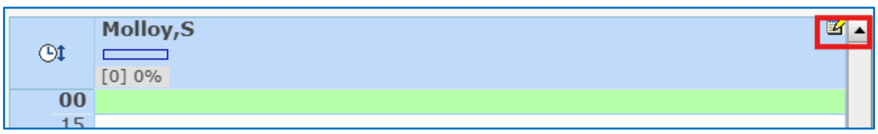


To complete this process, you will need to enter a **Day Schedule Comment.**

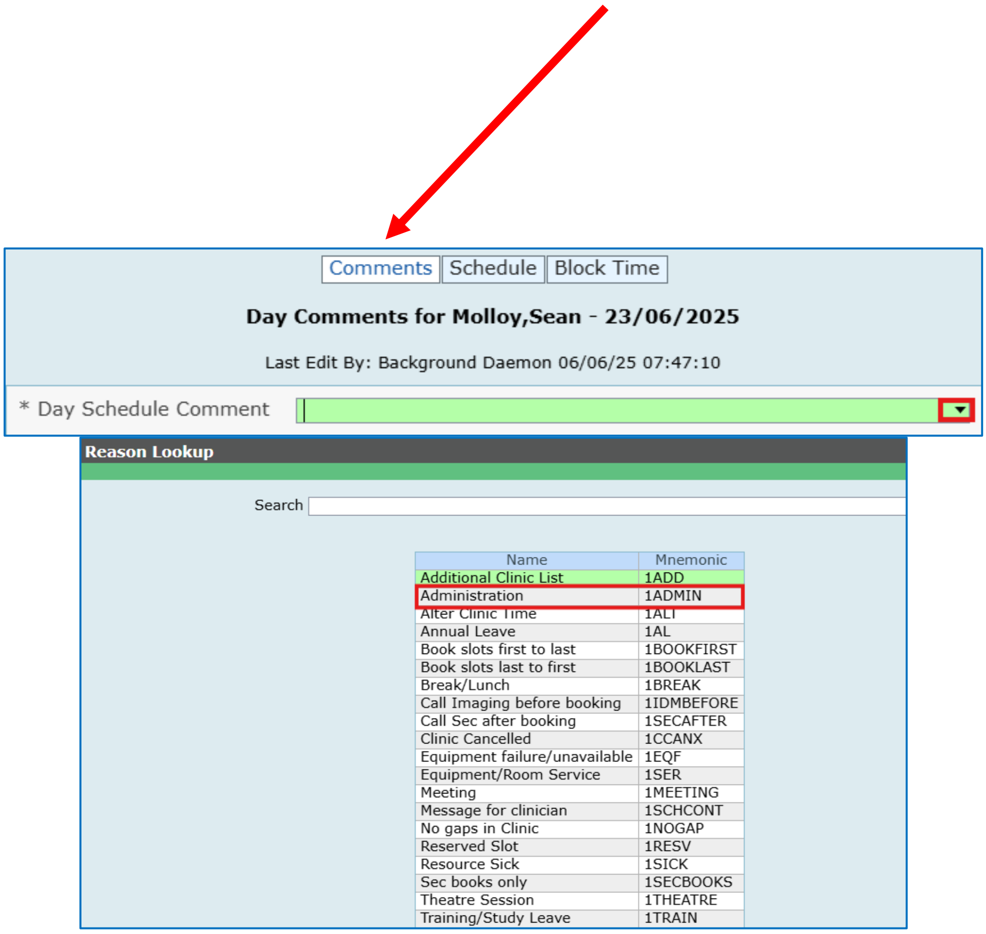


How to Block Time During A Clinic Session

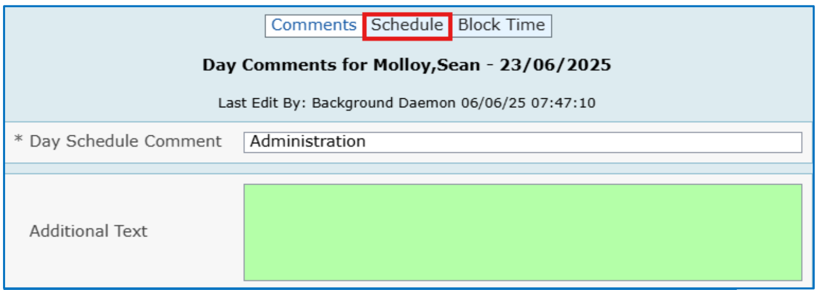
If you need to **block out a slot** for a meeting, lunch, or any other reason, you can do so by clicking the **pen and notebook icon** and then selecting "**Schedule**" from the **Edit Resource Schedule window**.

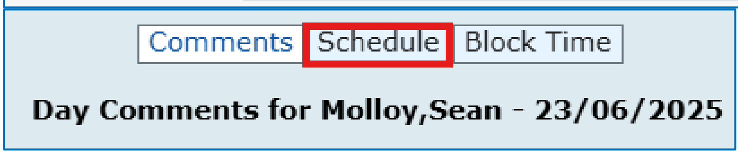


Click the **LookUp** arrow to input the data – Administration.



Next, select the **Schedule** tab.





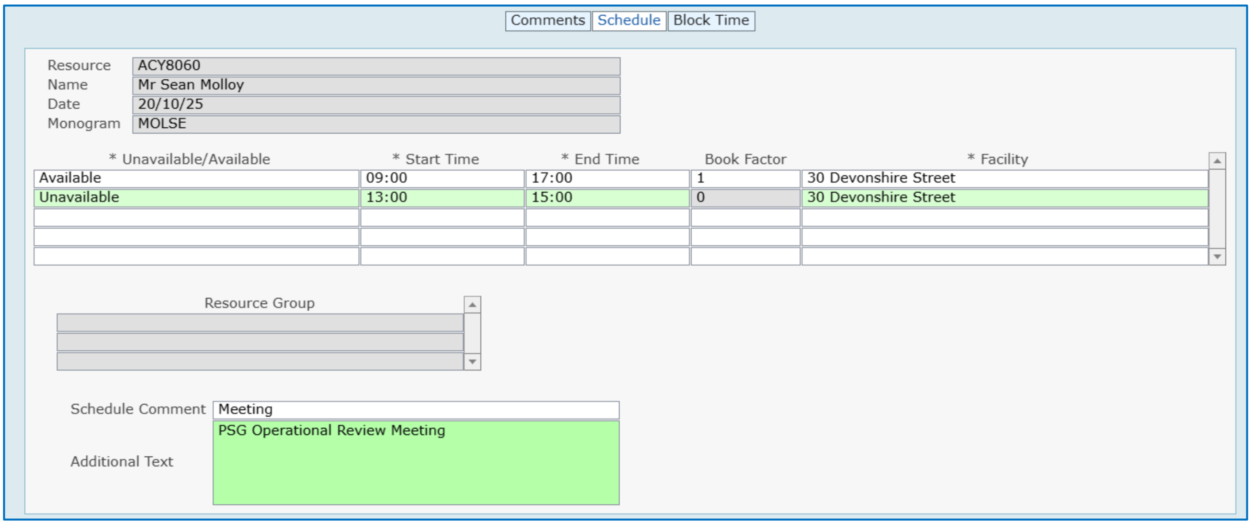
In the **Edit Resource Schedule** window, you can view the resource's details.

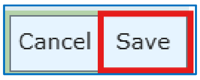
Additionally, the second grid requires the un-availability information:

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

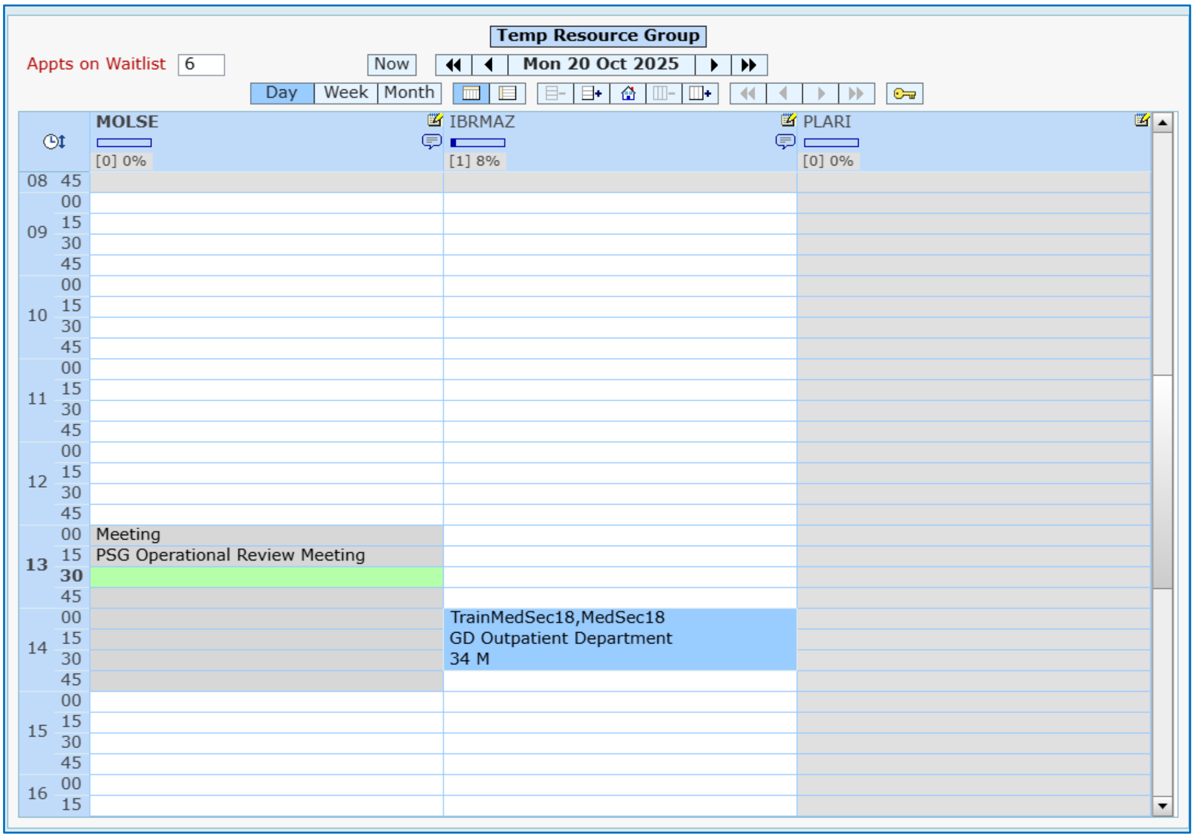
- **Unavailable/ Available**: Unavailable.
- **Start Time**: 13:00.
- **End Time**: 14:00.
- **Facility**: 30 Devonshire Street.

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



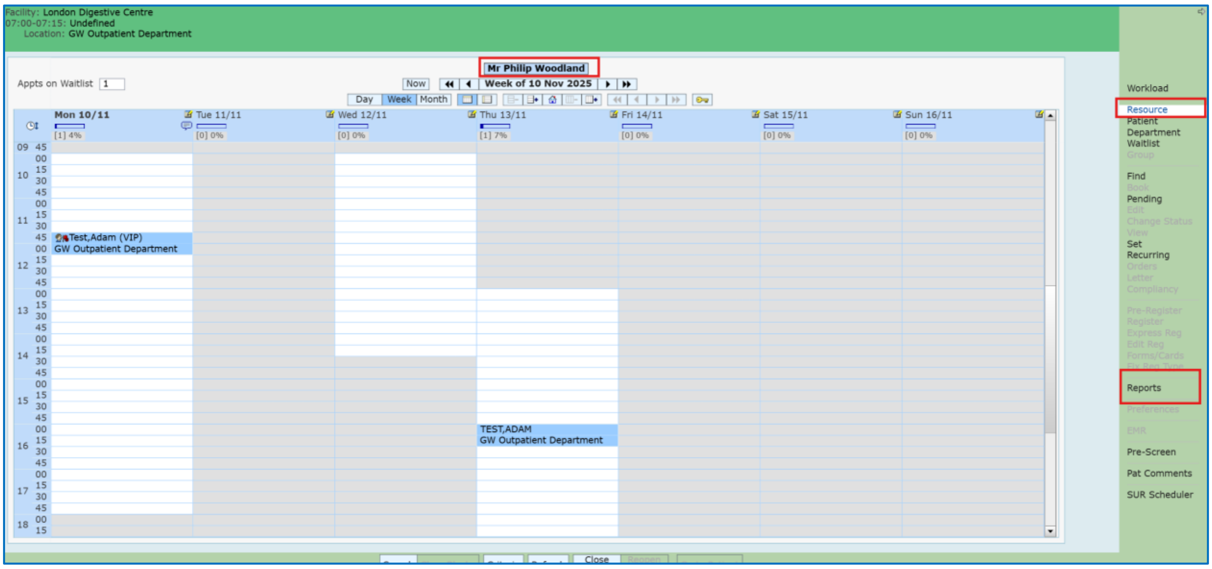
Click **Save**. 

You can now see the blocked time.

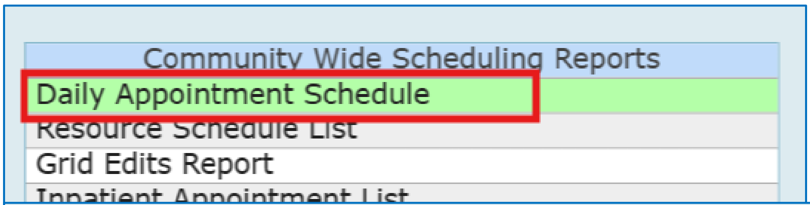

Temp Resource Group
Appts on Waitlist 6
Now
Mon 20 Oct 2025
Day
Week
Month
MOLSE
[0] 0%
IBRMAZ
[1] 8%
PLARI
[0] 0%
08 45
09 00 15 30 45
10 00 15 30 45
11 00 15 30 45
12 00 15 30 45
13 00 15 30 45
14 00 15 30 45
15 00 15 30 45
16 00 15
Meeting
PSG Operational Review Meeting
TrainMedSec18,MedSec18
GD Outpatient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

How to Print & Download Clinic Lists

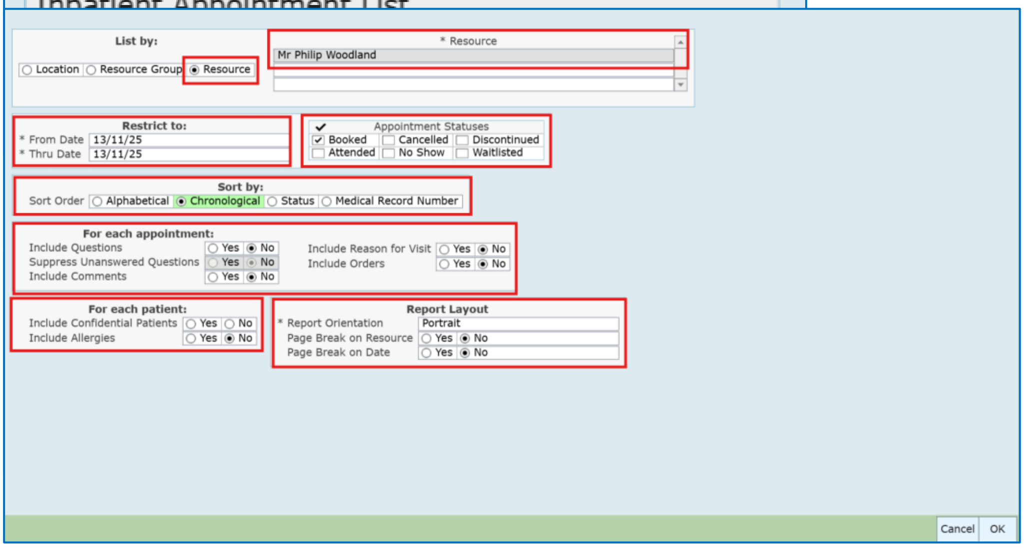
If you need to print your clinic list, you can do so by clicking **Reports** when in **Resource** and you are **viewing your consultant Diary.**



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**

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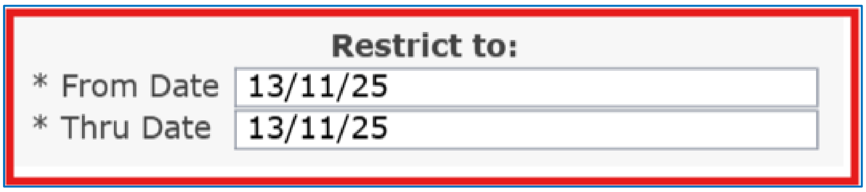
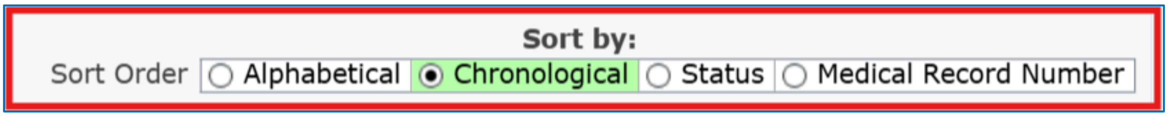
- Enter the **dates you require** as appropriate from the **Restrict To** Section



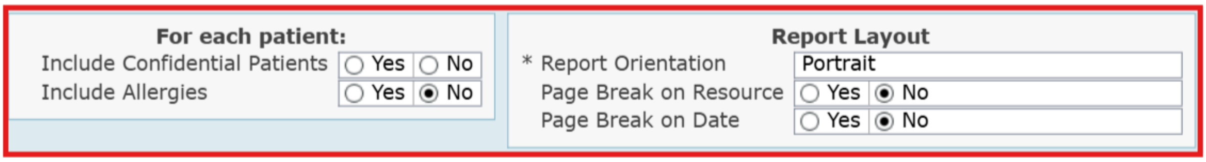
- Select the **appointment Statuses** you need i.e. **Booked** to view all currently booked appointments.

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



- 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.

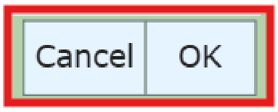
  Expanse will by default select all these as NO, however you can change this as required.



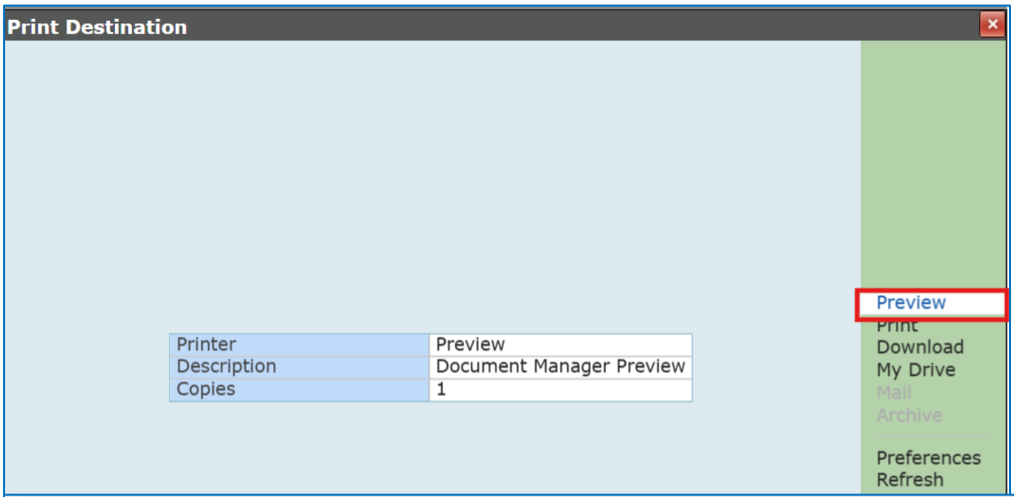
N.B If you are printing multiple dates, you may want to have a **Page Break,** so that the new date starts on a new page.

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**.**

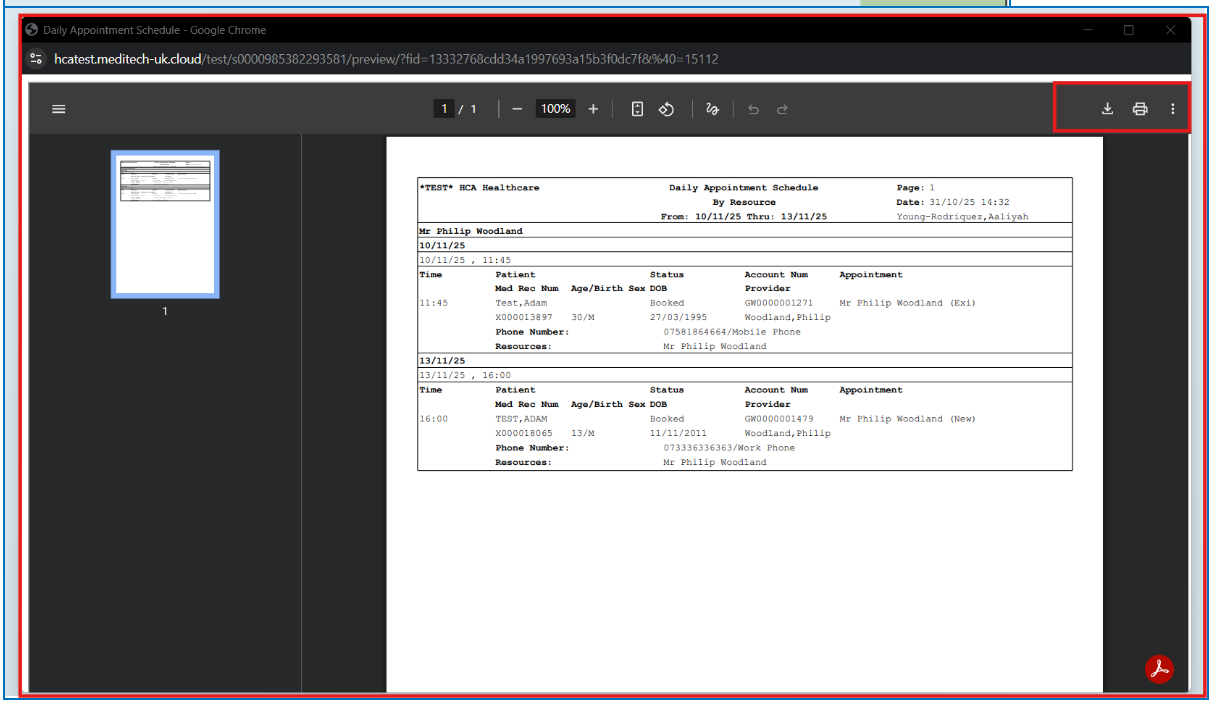
Select OK



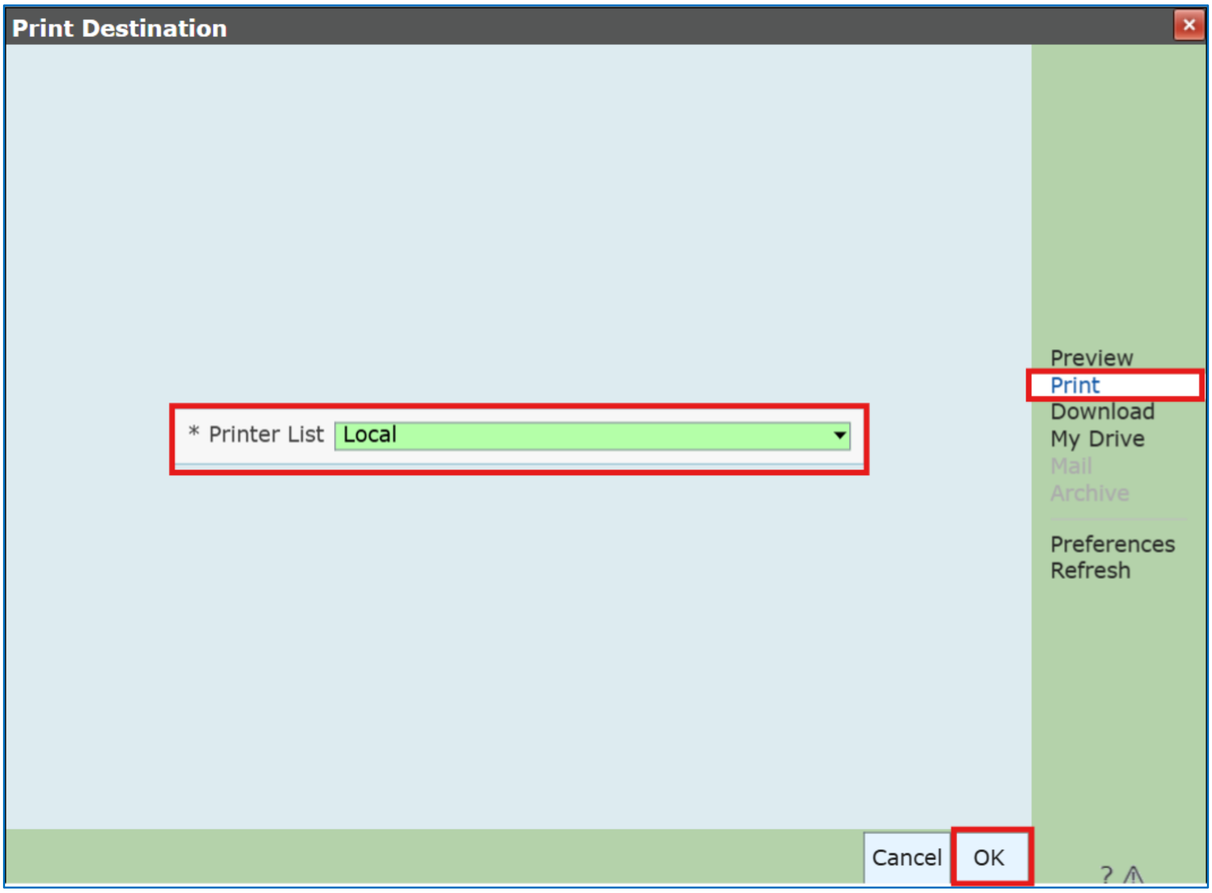
The below screen will pop up, to **download** the clinic list click **Preview** and then **OK**



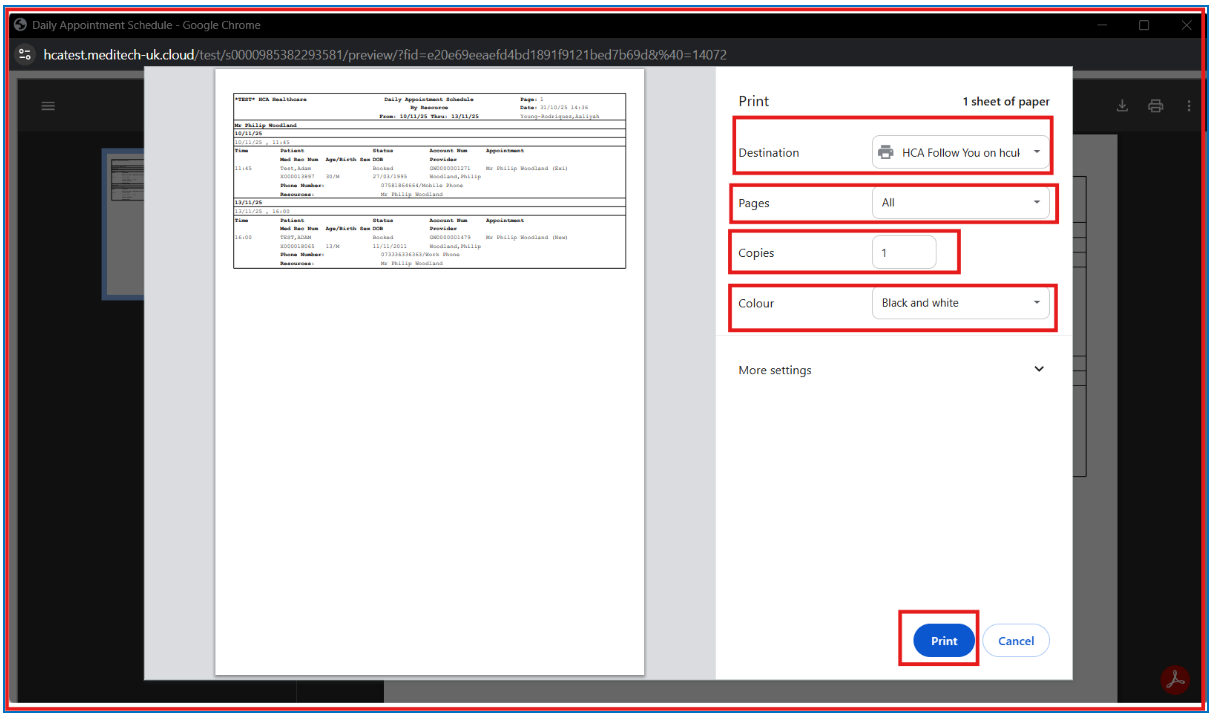
A pop-up window will appear where you can then download or also print the list as required:



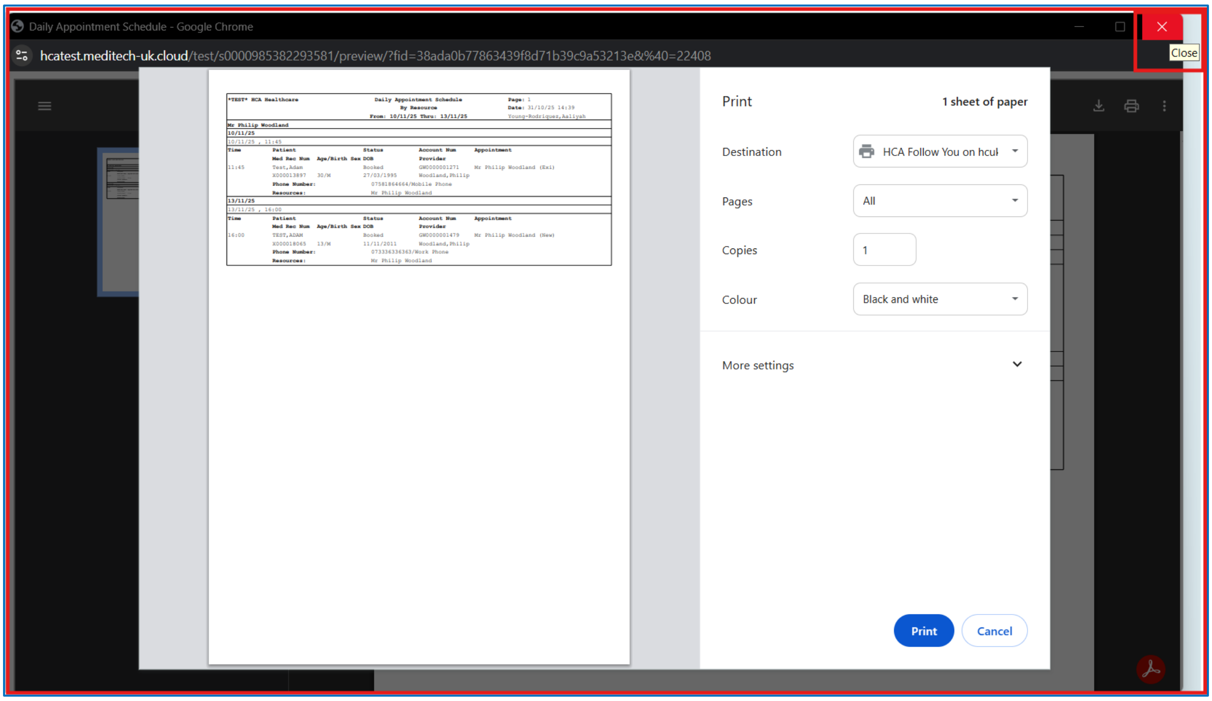
To print the list immediately, click **Print**, select **Local** and then click **OK**



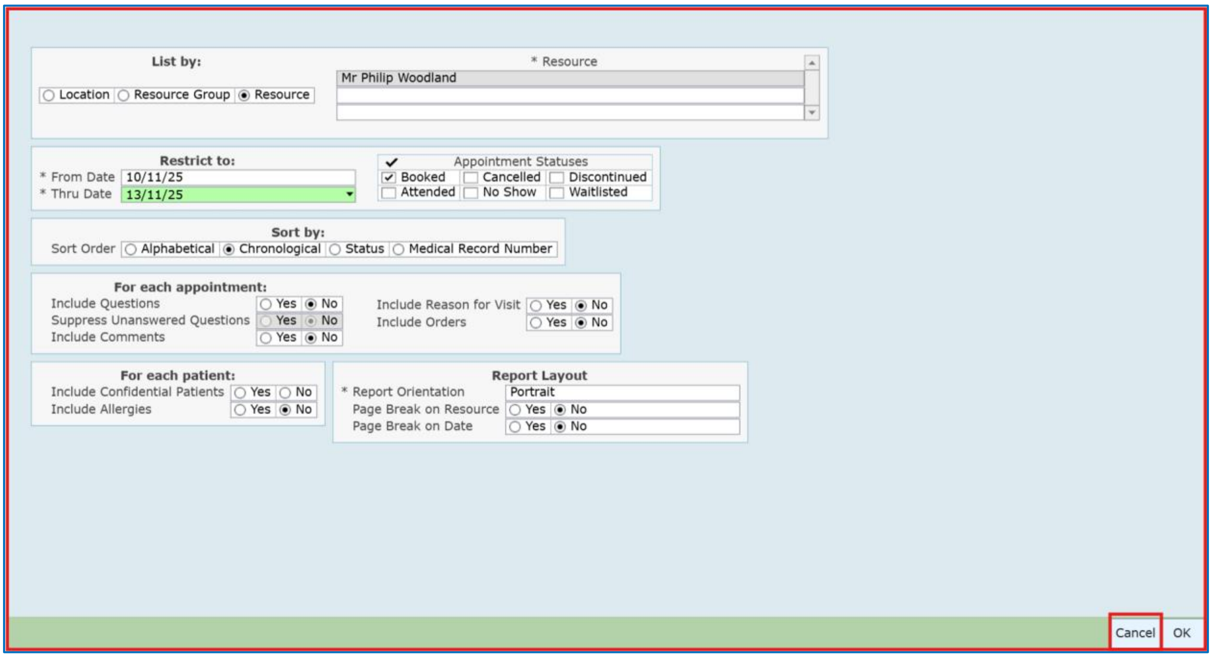
You will see the below pop-up window. **Select** the **Destination** Printer, **Pages required**, Number of **Copies, Colour Preferences** and then **Print**



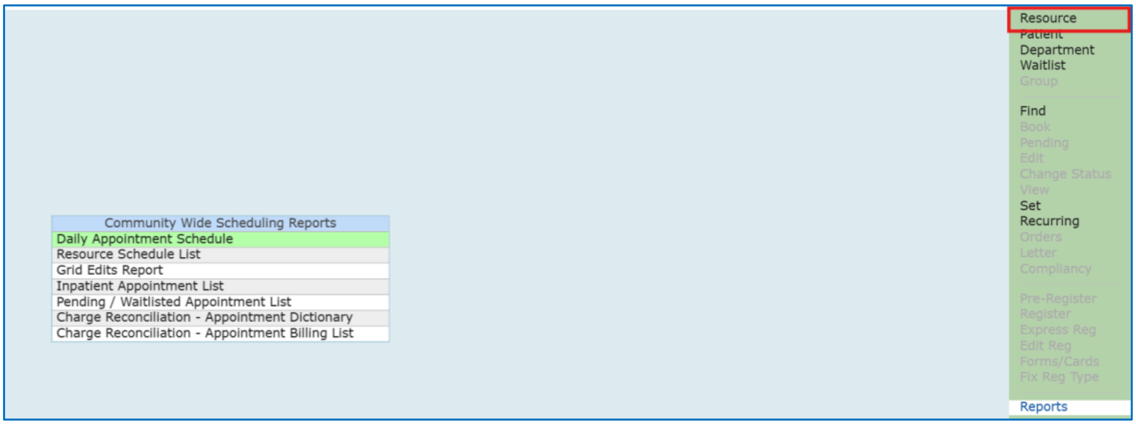
Once you have Printed or Downloaded your list, you will return to the below screen. To leave this area **click** on the **X button** at the top of the screen



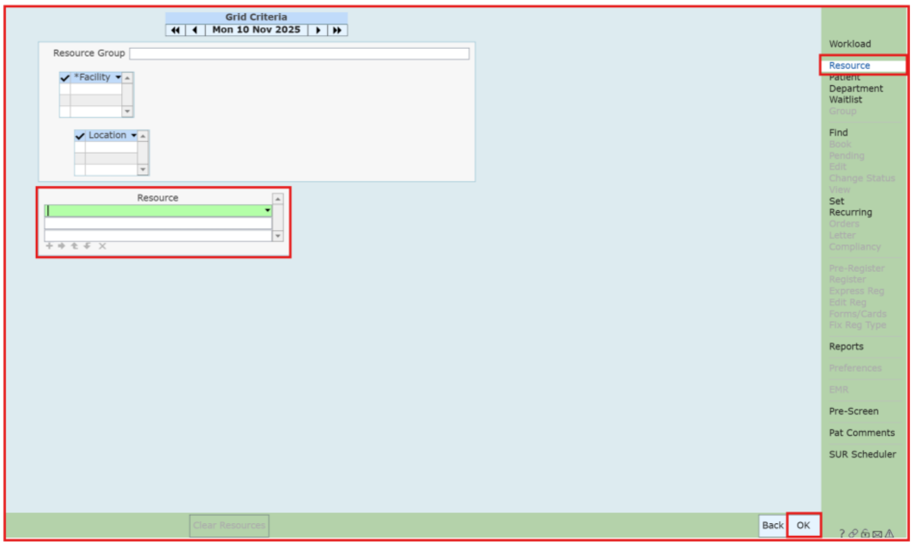
You will then return to the below screen. **Click Cancel** on the below screen:



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

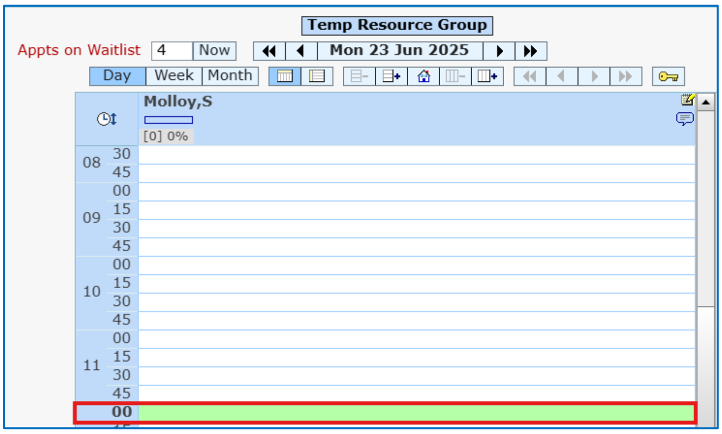


You will then see the below screen, **Enter** your **consultant's mnemonic** as normal to find their diary and click **OK**:



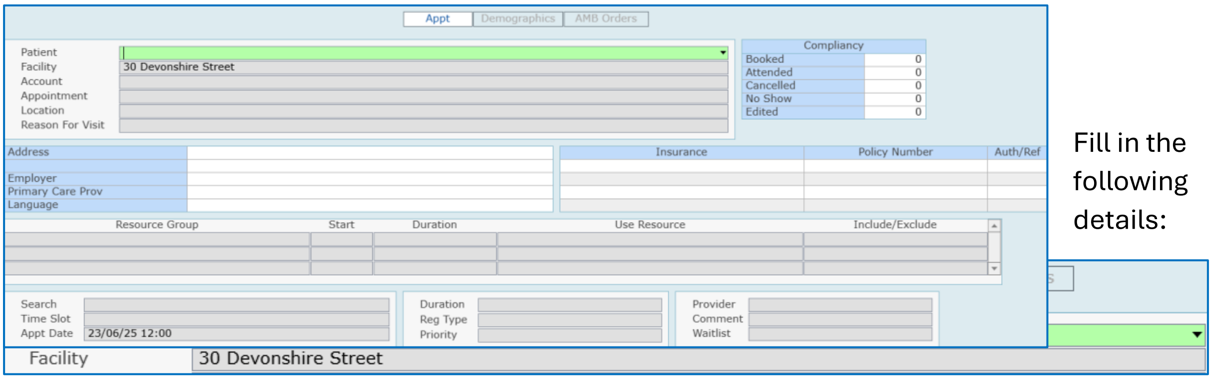
Consultant Appointment Scheduling via Resource Mode

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



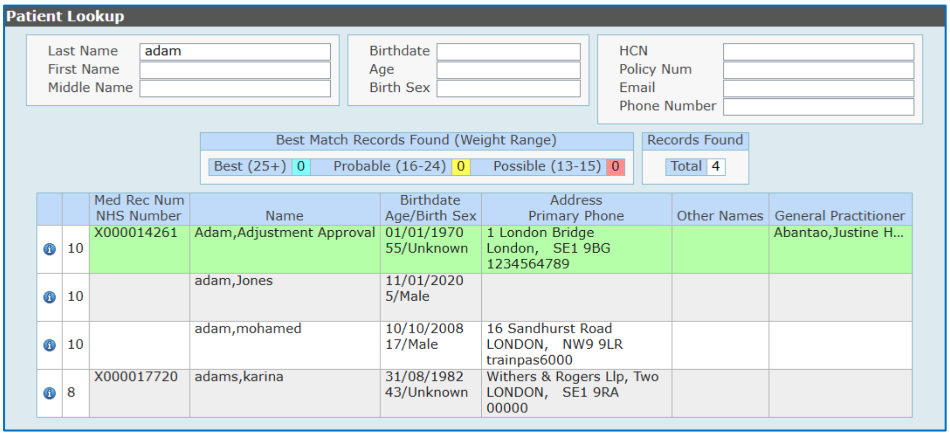
Choose **Book** from the **Function menu.**

You will need to complete the fields in the grid.

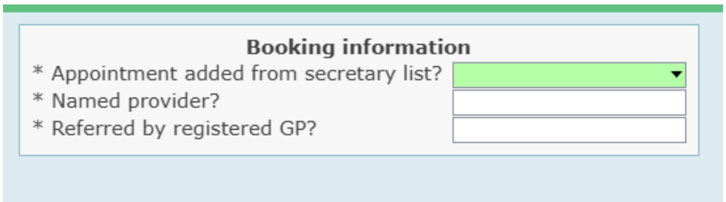


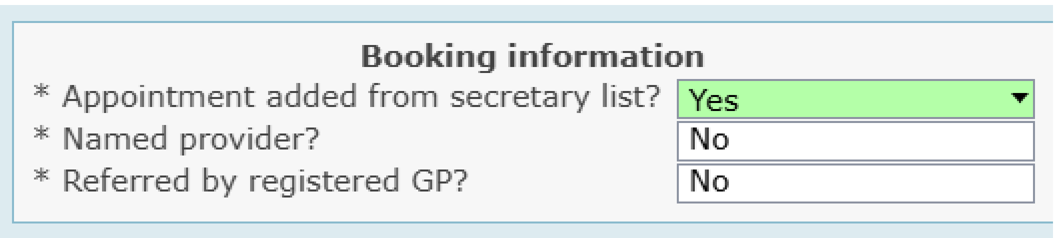
Fill in the following details:

- **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

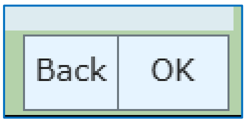


- **Account**: The account will always pre-populate as **"New"**
- **Appointment**: Choose the type of appointment i.e. **New**, **Existing** etc
- Booking Information: **Enter the below fields**



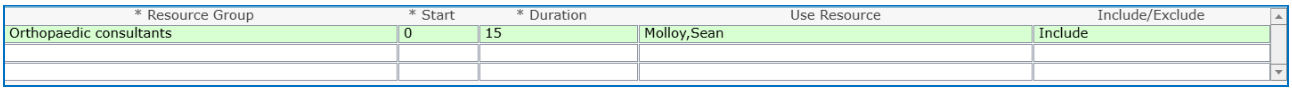


- Click **OK**

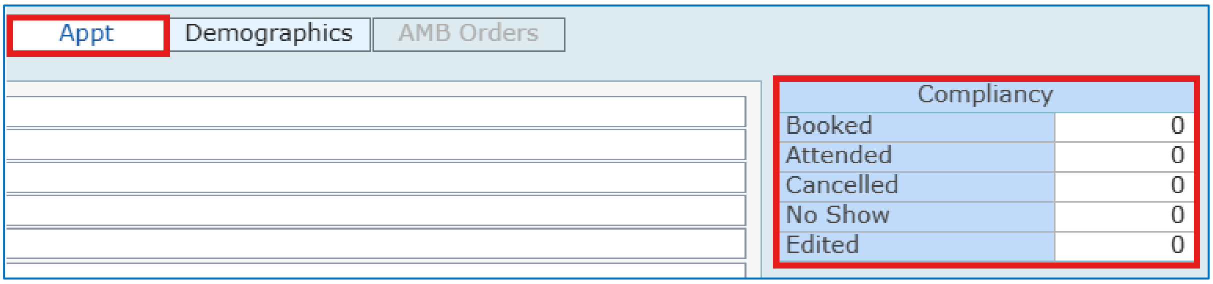


- **Reason for Visit**: This field is be manually typed – i.e. "spinal fracture, palpitations, 2nd opinion etc"

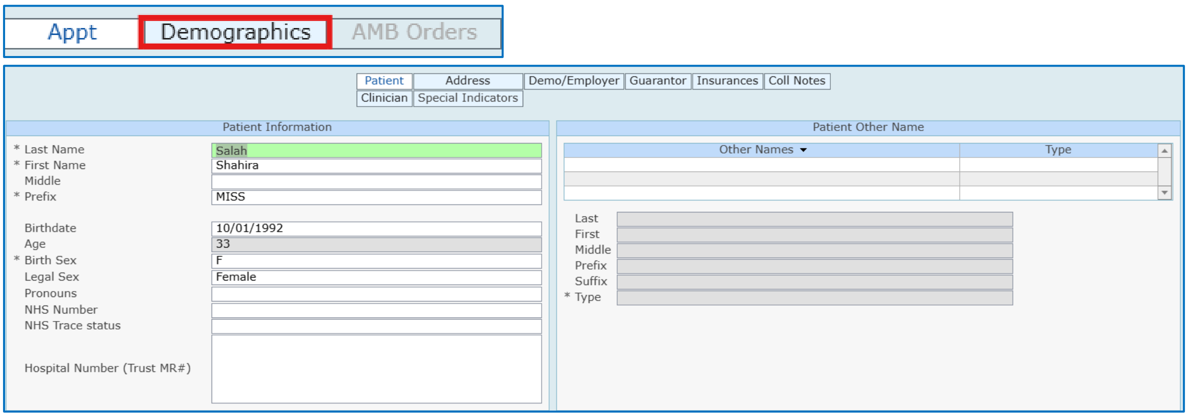
This section will display the resource group, which will automatically be labelled as Orthopaedics. The Duration field shows the length of the appointment, and the User Group field indicates the doctor's name.



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



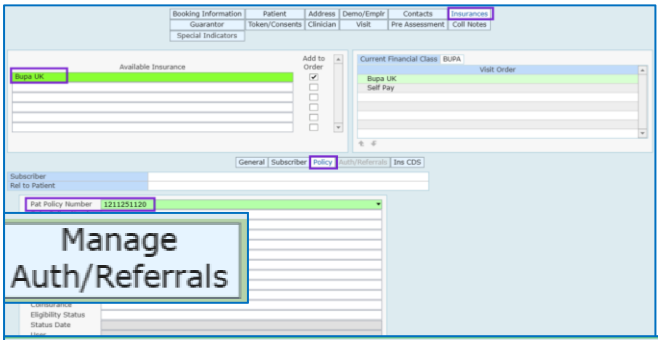
If you need to add or update any of the patient's demographic information during the scheduling process, you can do so using the **Demographics tab**.



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.

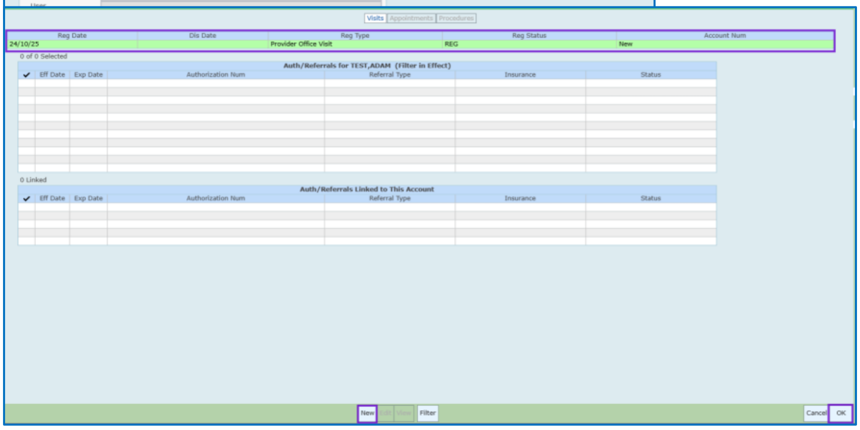
NB. If the patient is insured and they provide you a claim/ pre-authorisation number, you need to do the below additional mandatory fields. (**If you do not have a claim / pre-authorisation number, you will not need to do the below! You can skip to where it says Ok and Save"**

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



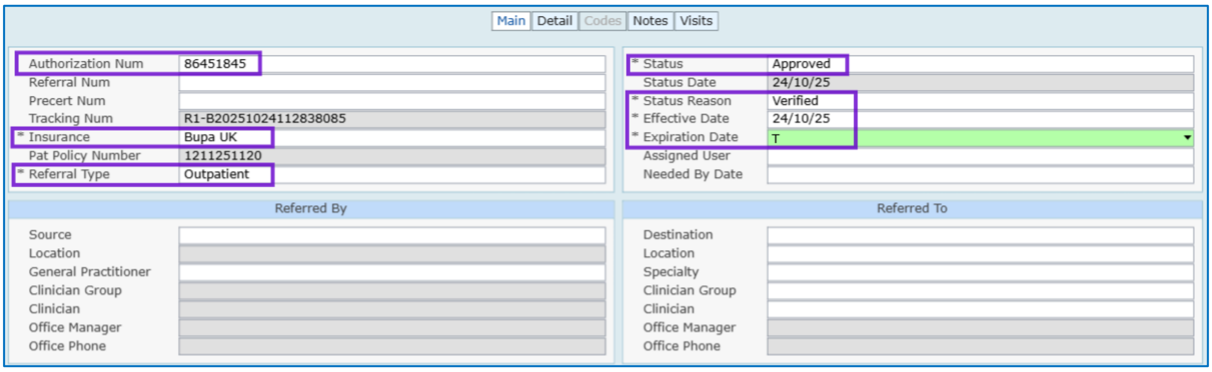
Enter the patient's **insurer** and **policy number** and then click **Manage Auth/Referrals**:

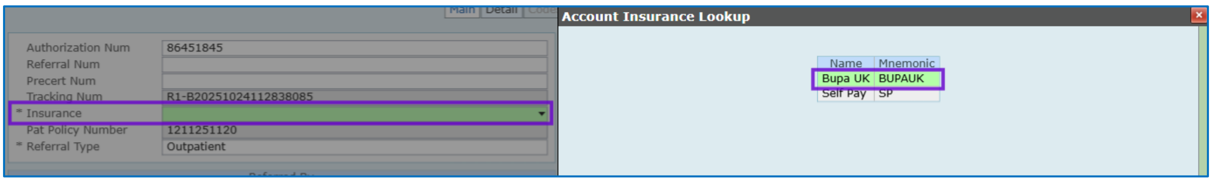
You will then see the below:



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:

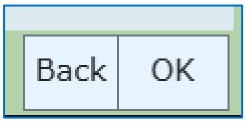




The mandatory fields within the authorisation screen are:

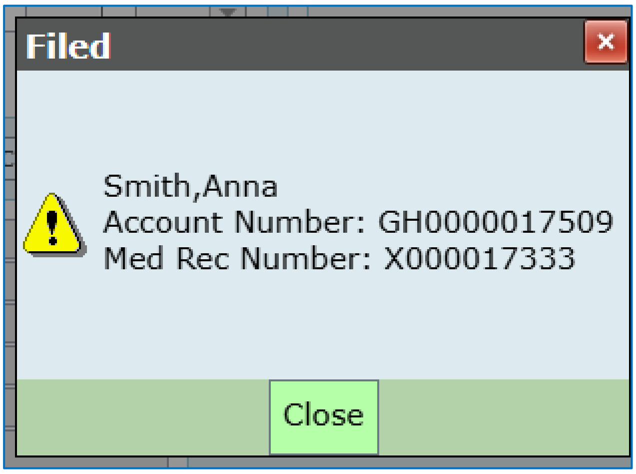
- Referral Type – This will always be **Outpatient**
- Status - This will always be **Approved**
- Status Reason – This will always be **Verified**
- Effective Date – This is the **Appointment Date**
- Expiration Date- this is also the **Appointment Date.**

Click **OK Twice.**

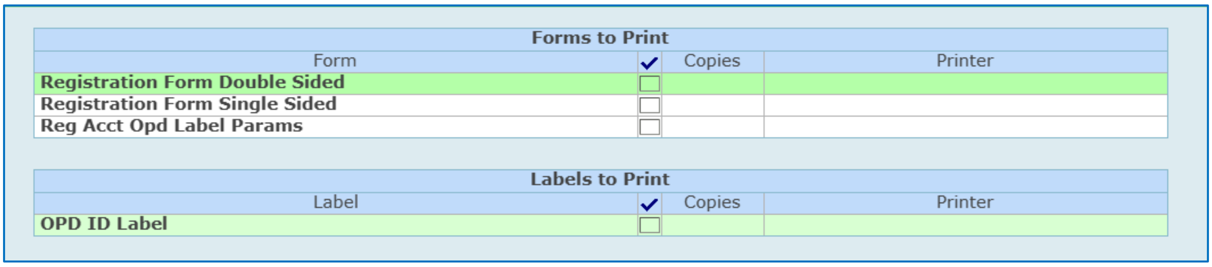


Click **Save (when you finished Pre-registering)**

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



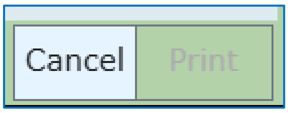
Next you will see this below screen –



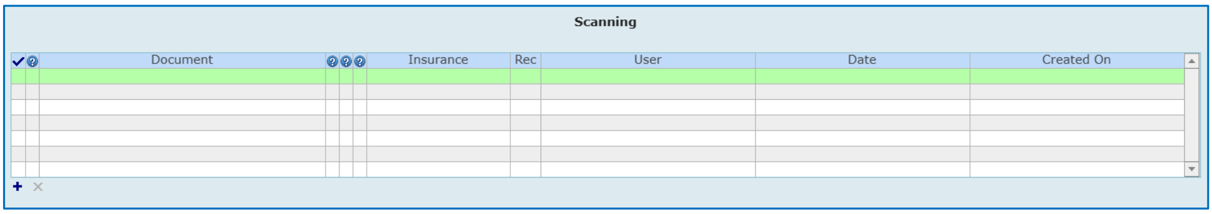
Forms to Print			
Form	✓	Copies	Printer
Registration Form Double Sided	☐		
Registration Form Single Sided	☐		
Reg Acct Opd Label Params	☐		

Labels to Print			
Label	✓	Copies	Printer
OPD ID Label	☐		

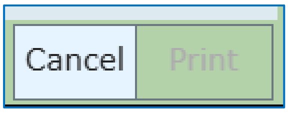
Click **Cancel**



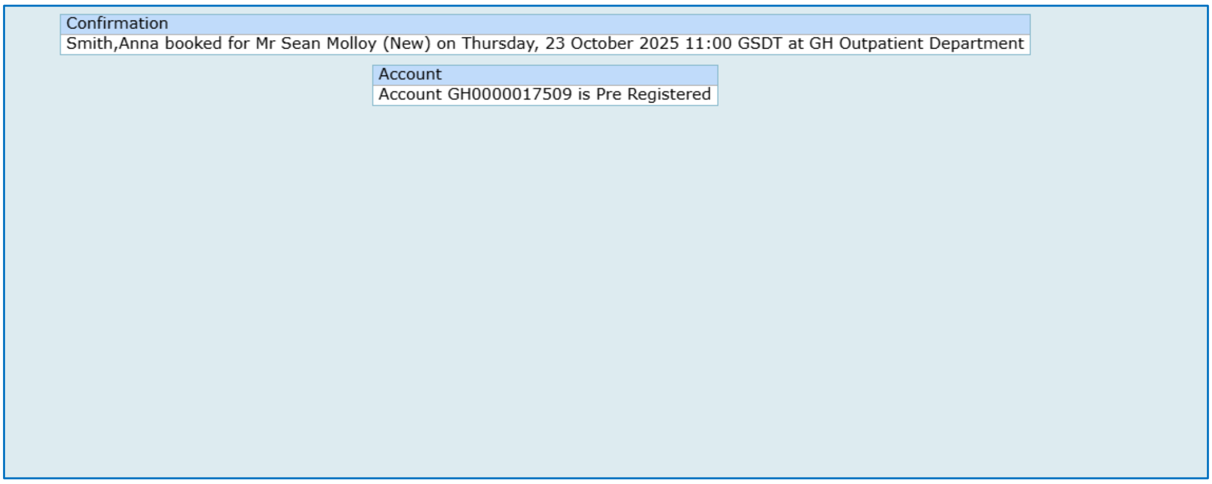
Next you will see this below scanning screen –

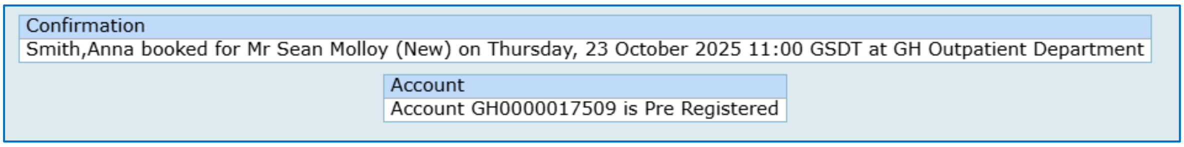


Click **Cancel**

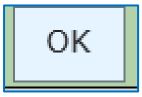


Finally, you will see a confirmation of the appointment being booked on the schedule, including the confirmation of the pre-registration being completed.

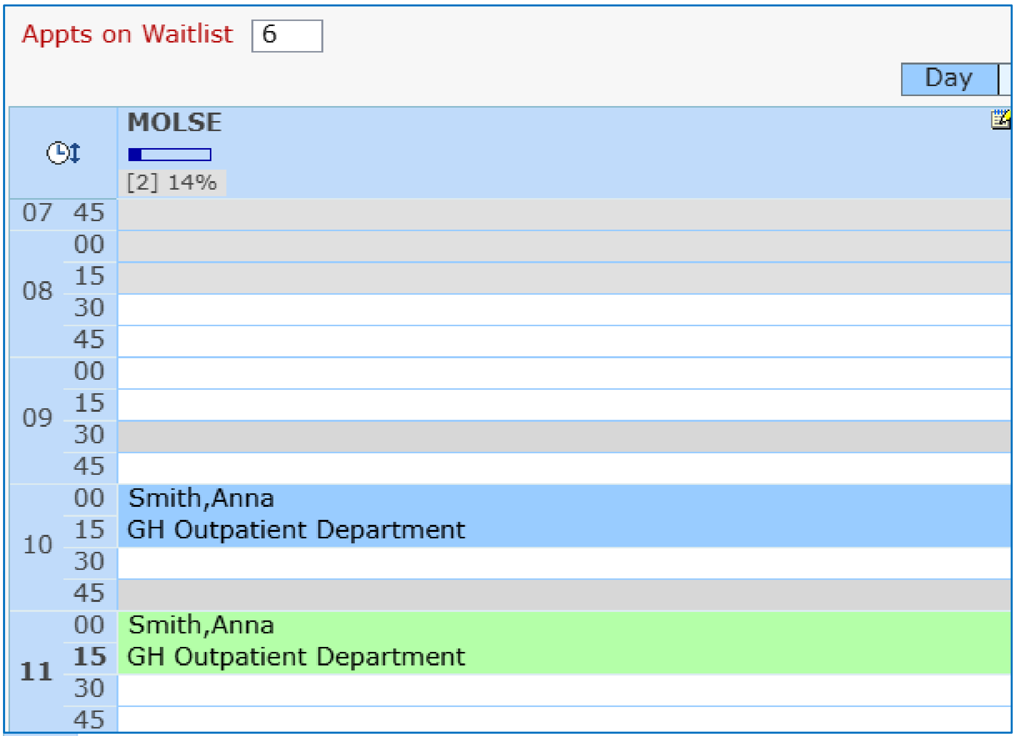




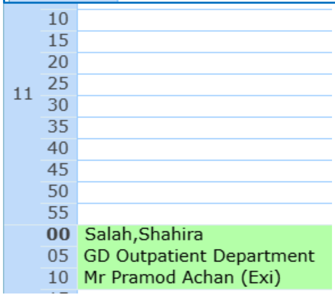
Click **OK**.



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

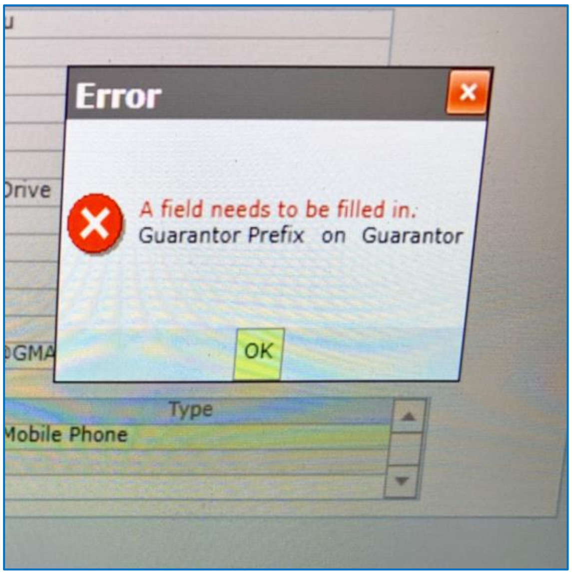


Reminder: If you want to reduce the increment to, say, 5 minutes, you will be able to see more details about the patient on the diary.

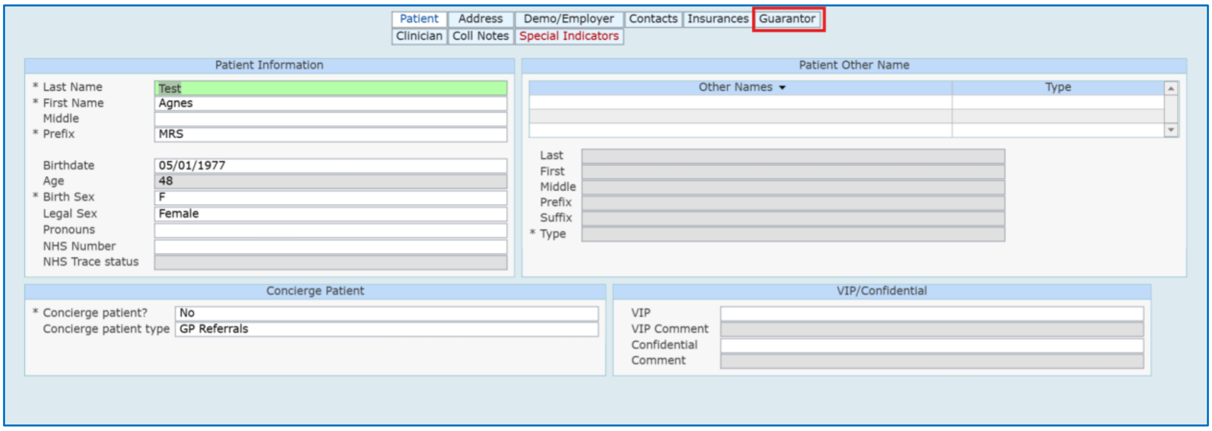


Guarantor Guidance – Prefix & Updating Guarantor Details

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**

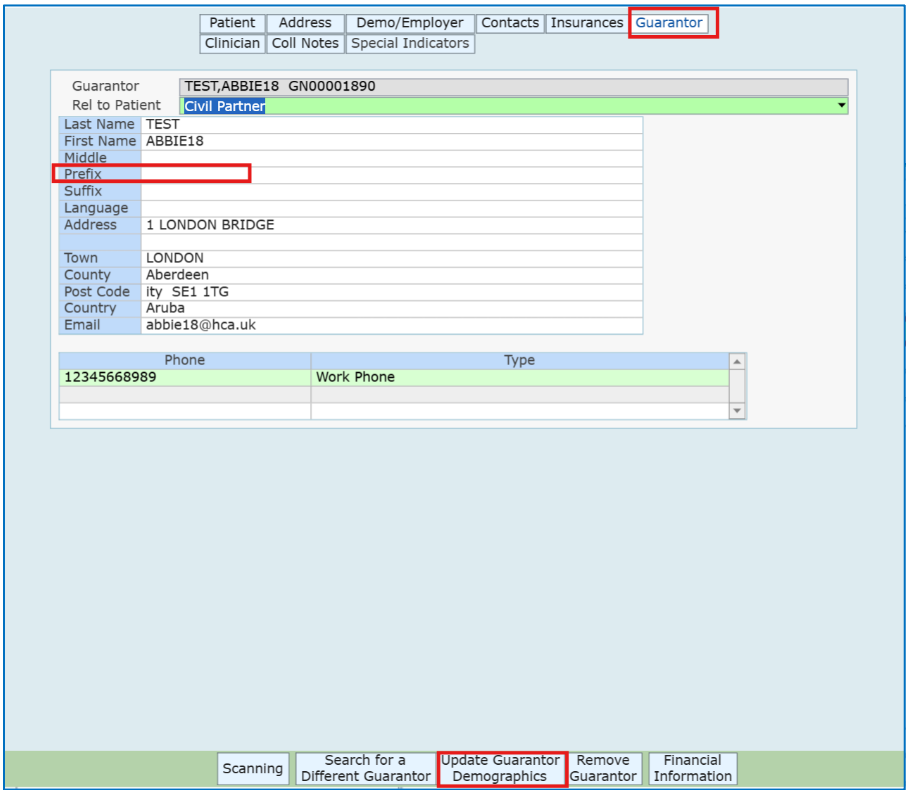


The system, will automatically take you to the demographics section of the patient, click on **Guarantor**

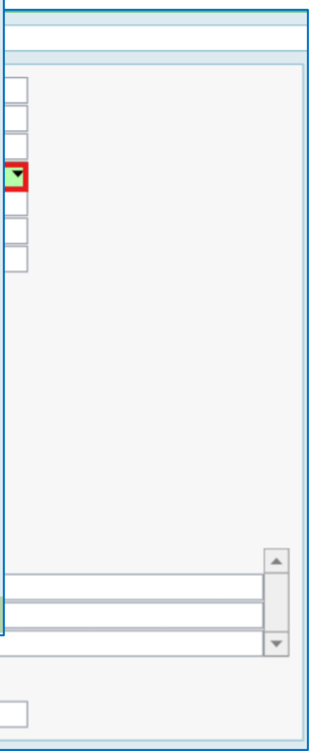


Once on the **Guarantor** page you will see that the **Prefix** is blank. This needs to be added in, before you can confirm the appointment for the patient.

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

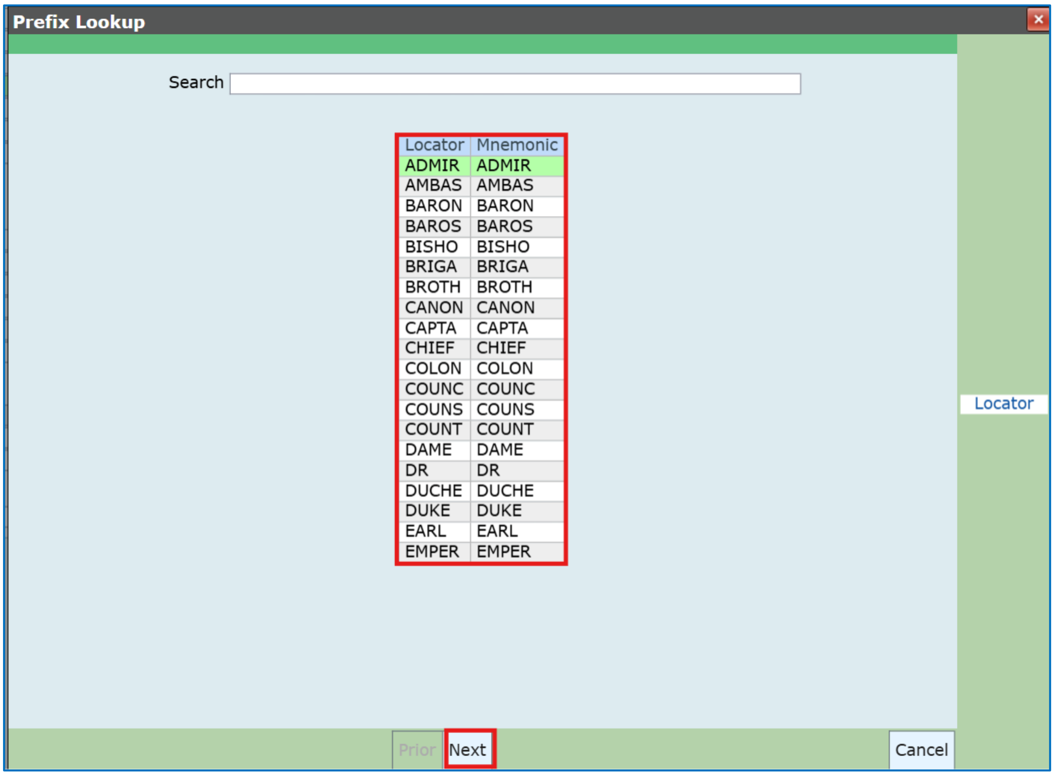


This will take you to the below screen

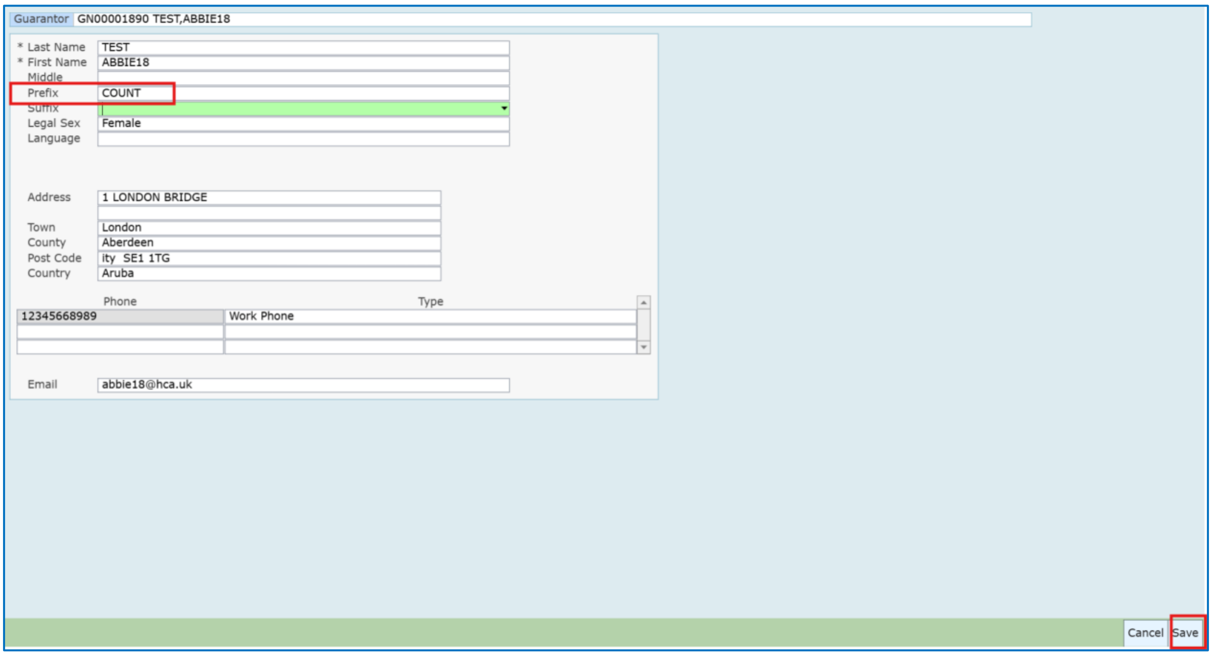


Click on the **LookUp** arrow, which will provide a selection of Prefix's/salutations.

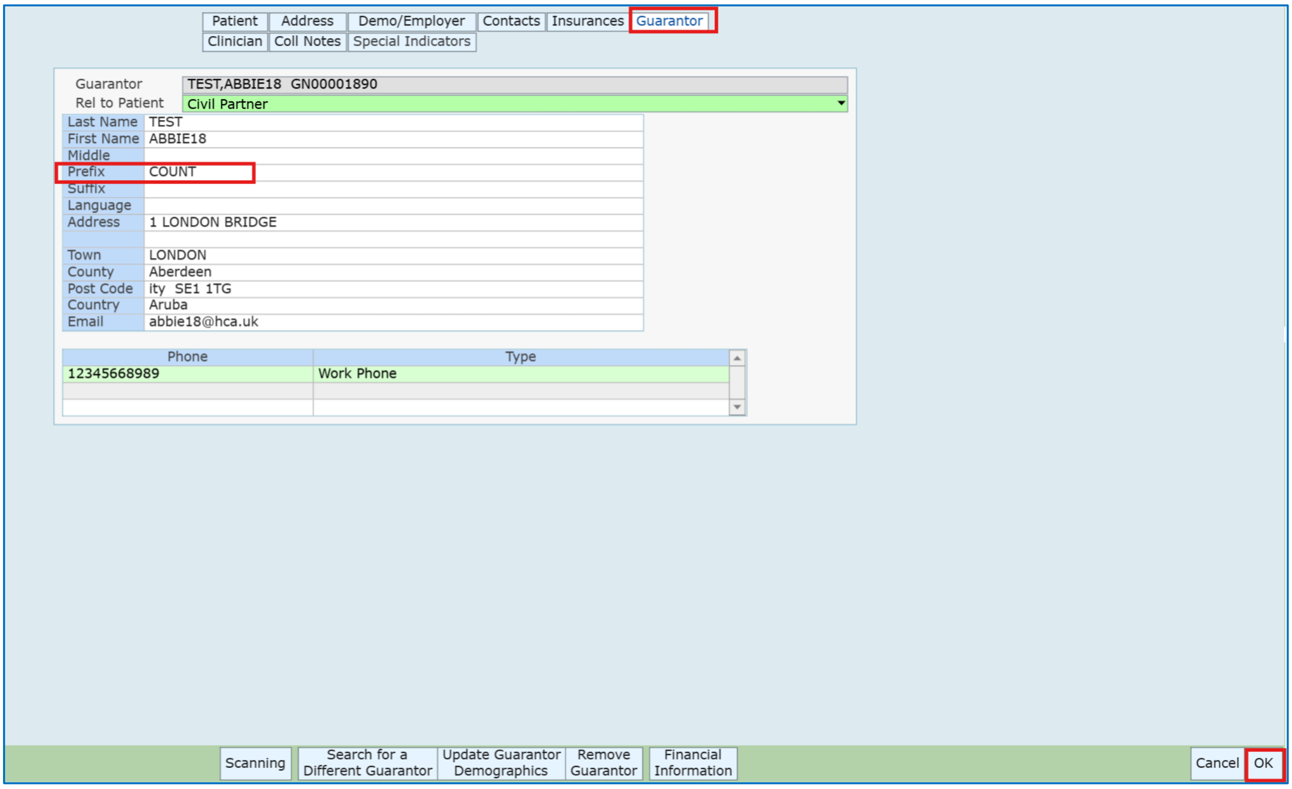
N.B You can change any of the details for the **Guarantor** in this section.



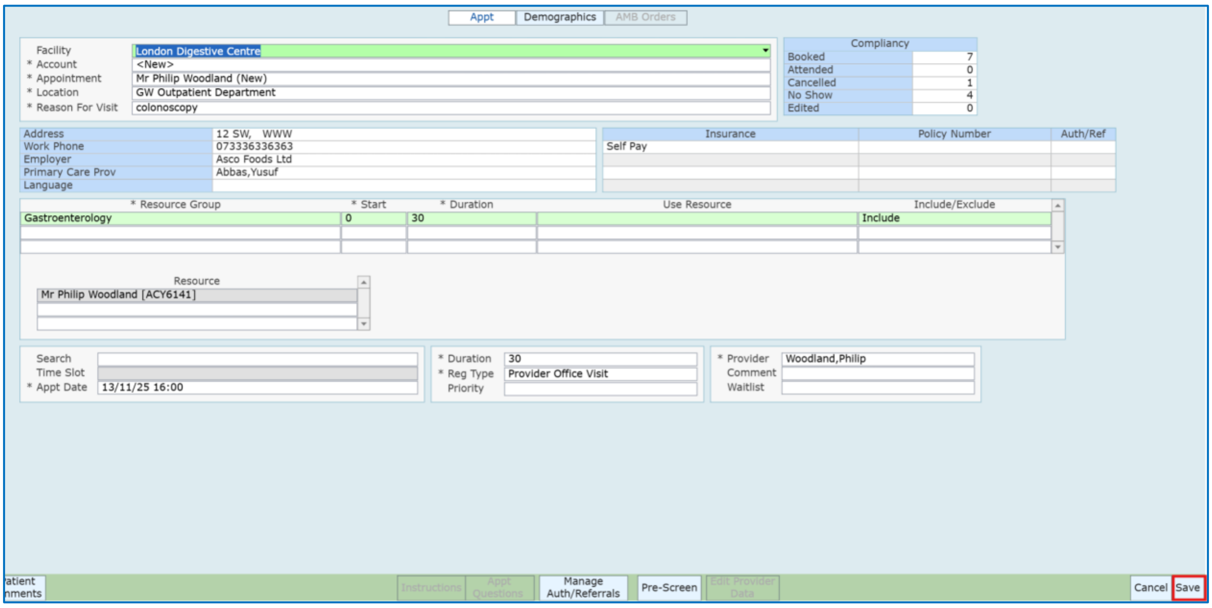
Click on the required **Prefix** (there are multiple pages to choose from), then once selected, this will populate the field, and you can select **Save**



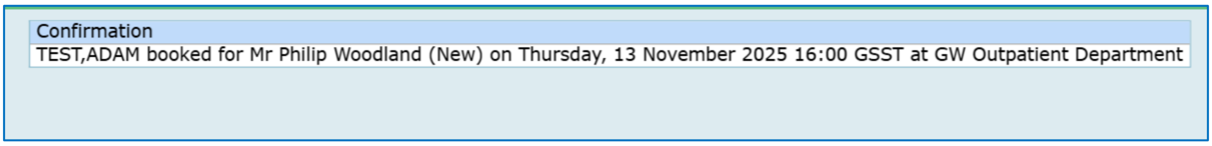
This will take you back to the **main demographics section** on the **Guarantor** Page and you can see the Prefix is now filled in. Press **OK**



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



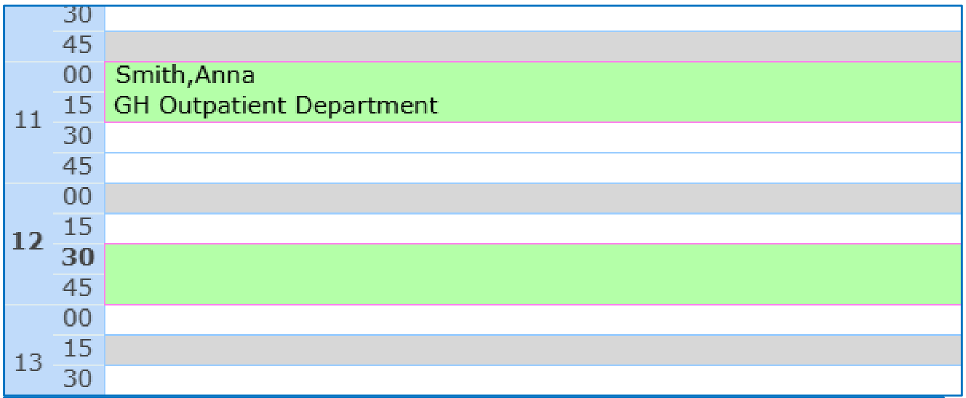
Click **Save**



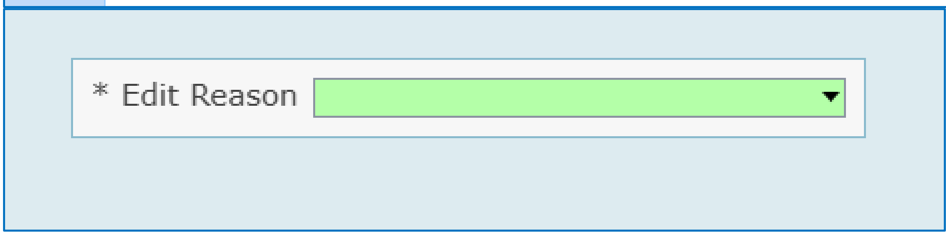
The appointment is now booked.

How to Edit & Cancel Appointments

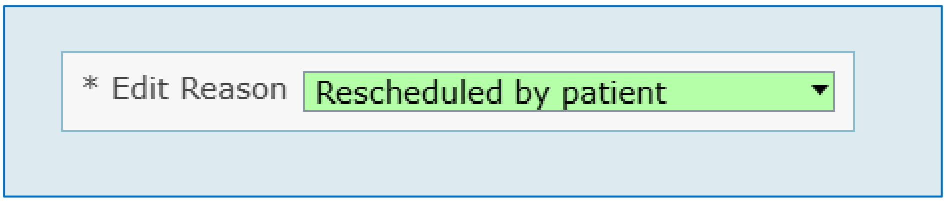
If a patient contacts you to reschedule their appointment and needs to move it to a later time during the day, if it's for the same consultant, you can simply **select and hold** the appointment and drag it to an earlier or later time. I.e. 12:30pm from 11:00am.



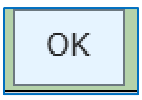
Next, enter an **Edit Reason.** Click the **Lookup arrow,** to view the **Edit Reasons**



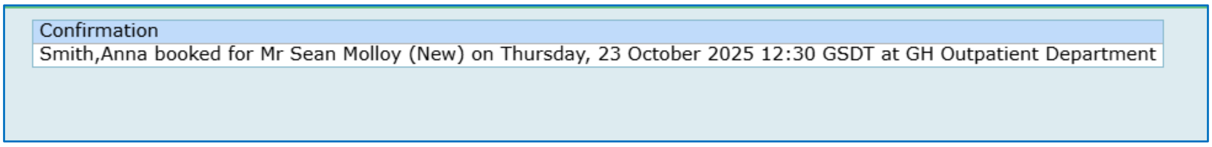
Name	Mnemonic
Cancelled by Consultant	1CBC
Cancelled by department	1CBD
Cancelled by pat less 24hrs	1CBP24
Cancelled by patient	1CBP
Consult/treatment not required	1CNR
Deceased	1DEC
Equipment failure/unavailable	1EQF
Face to Face POA apt. required	SURF2FAPPT
Incorrect visit	1ADMINC
Insufficient funds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



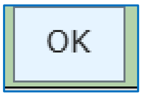
Then select **OK**



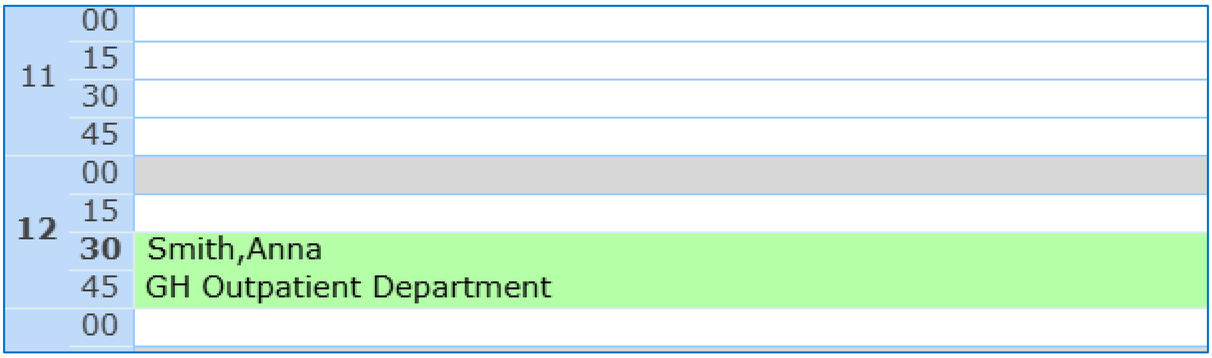
We can now see that the appointment has been rescheduled to 12:30 PM.



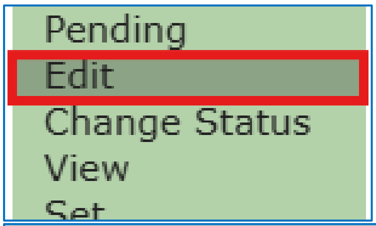
Then select **OK**



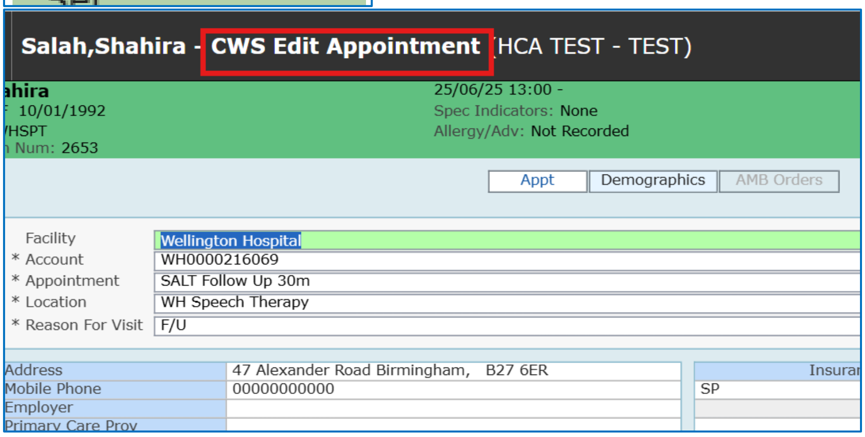
The patient has now been moved in the diary from 11:00am, to 12:30pm



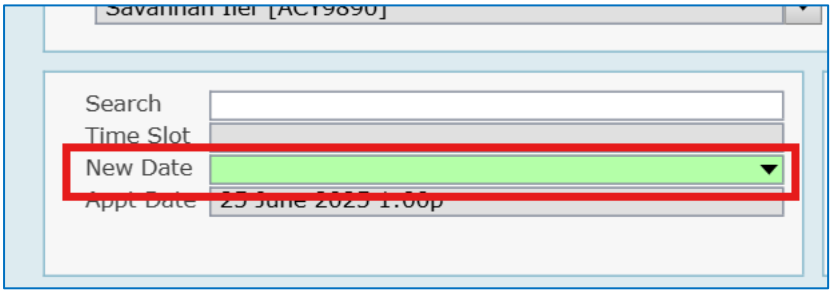
If you'd like to reschedule to a **different day**, without using the drag and drop function, you can use the **Edit option in the Function Menu**.



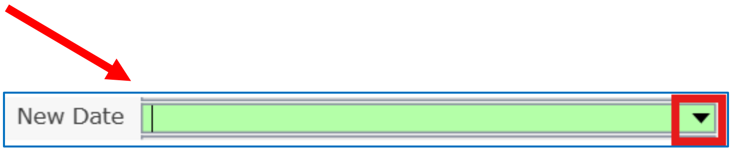
The Edit function brings us to the **CWS Edit Appointment** window.

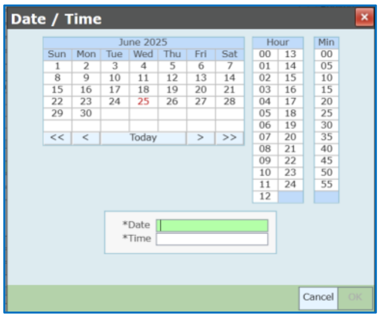


The appointment's date and time can be adjusted using the box located *at the bottom left* corner under **New Date**.

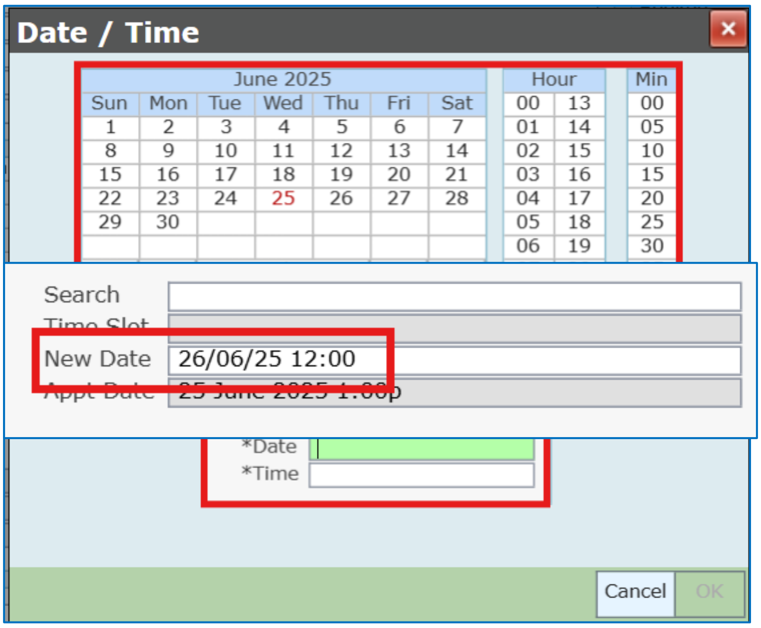


Use the **LookUp** function to retrieve a calendar, allowing you to select and modify the calendar as needed.



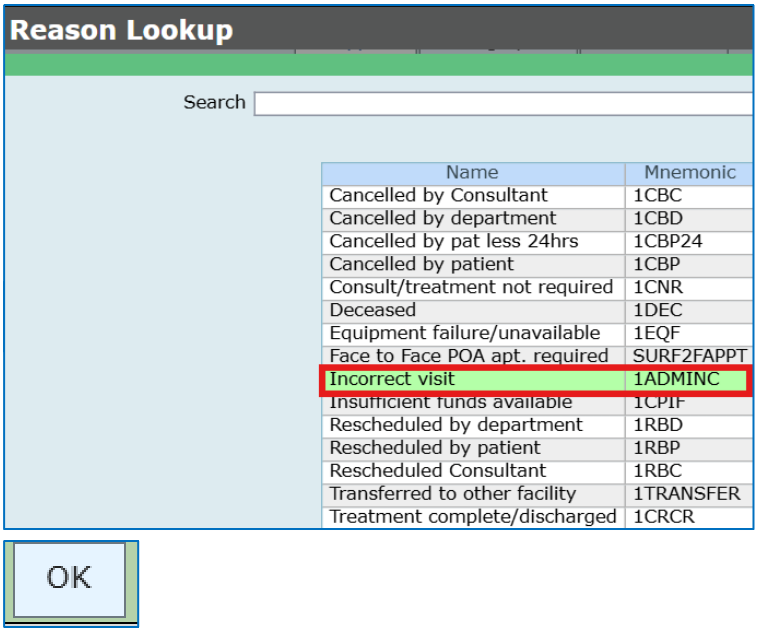


If you want to reschedule the appointment for the next day at **12 PM** - To use the function within the calendar, either select the date and time or type the date and time directly into the field at the bottom of the Date/Time screen and click **OK**.



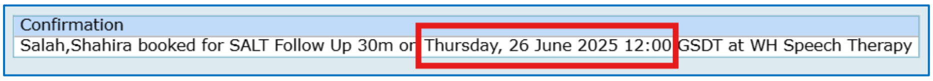
The updated date and time for the appointment are now displayed in the **New Date field.**

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

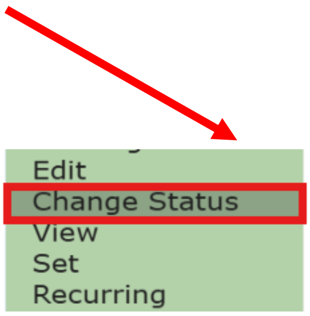


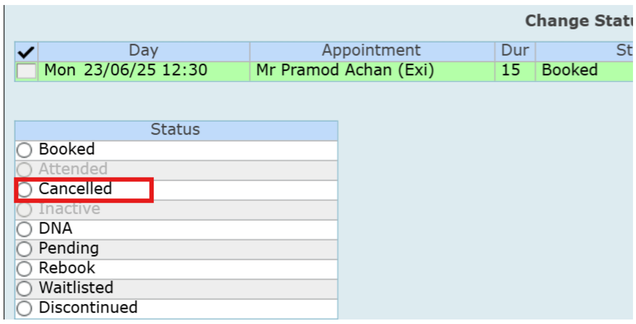
You can now proceed to **Save** the CWS Edit Appointment window.

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



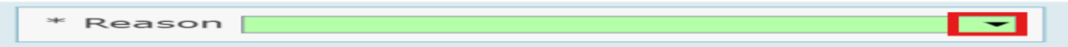
If you need to cancel the appointment, you can use the **Change Status** function from the **Function Menu** and click the **Cancel** button.





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

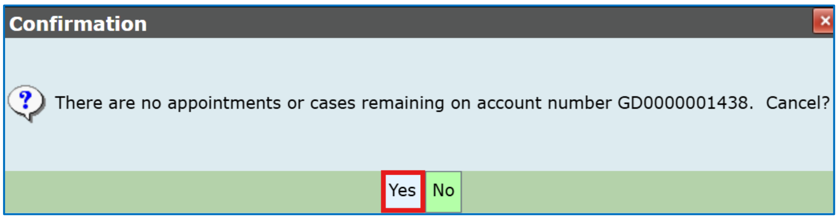
Please now enter the reason for cancellation by using the LookUp function to select an appropriate reason.



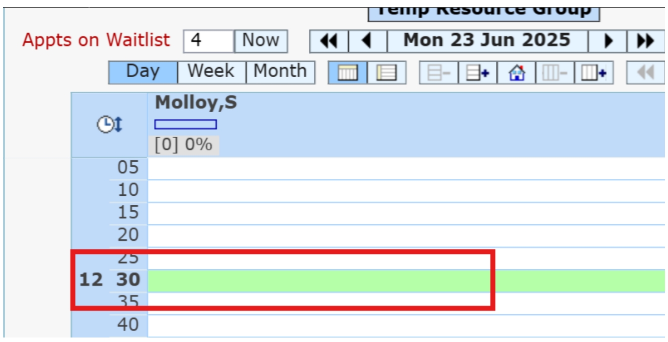
Name	Mnemonic
Cancelled by Consultant	1CBC
Cancelled by department	1CBD
Cancelled by pat less 24hrs	1CBP24
Cancelled by patient	1CBP
Consult/treatment not required	1CNR
Deceased	1DEC
Equipment failure/unavailable	1EQF
Face to Face POA apt. required	SURF2FAPPT
Incorrect visit	1ADMINC
Insufficient funds 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.

Click **Yes** on the confirmation window.

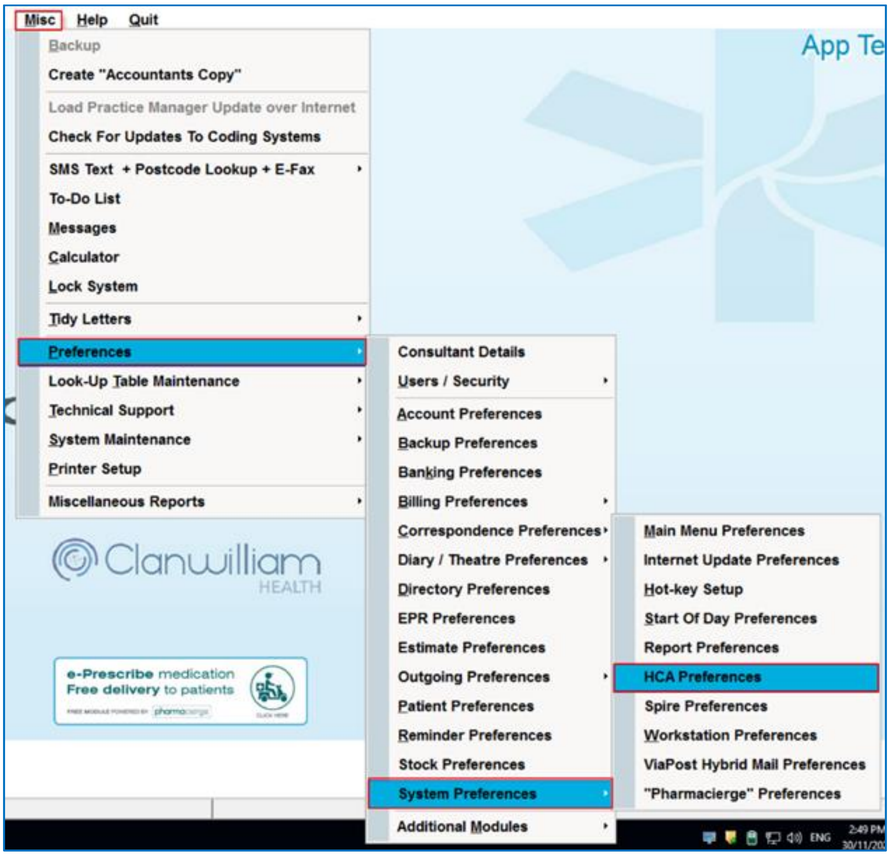


The appointment is now cancelled.

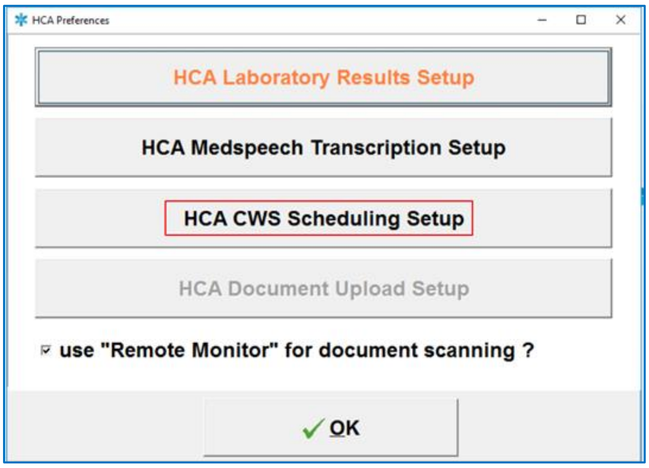


How to Filter Out Unwanted Appointments on HCA / Citrix DGL

1. From the DGL home screen (after logging into Practice Manager) follow the below:
    - Click “Misc”
    - Then “Preferences”
    - Then “HCA Preferences”

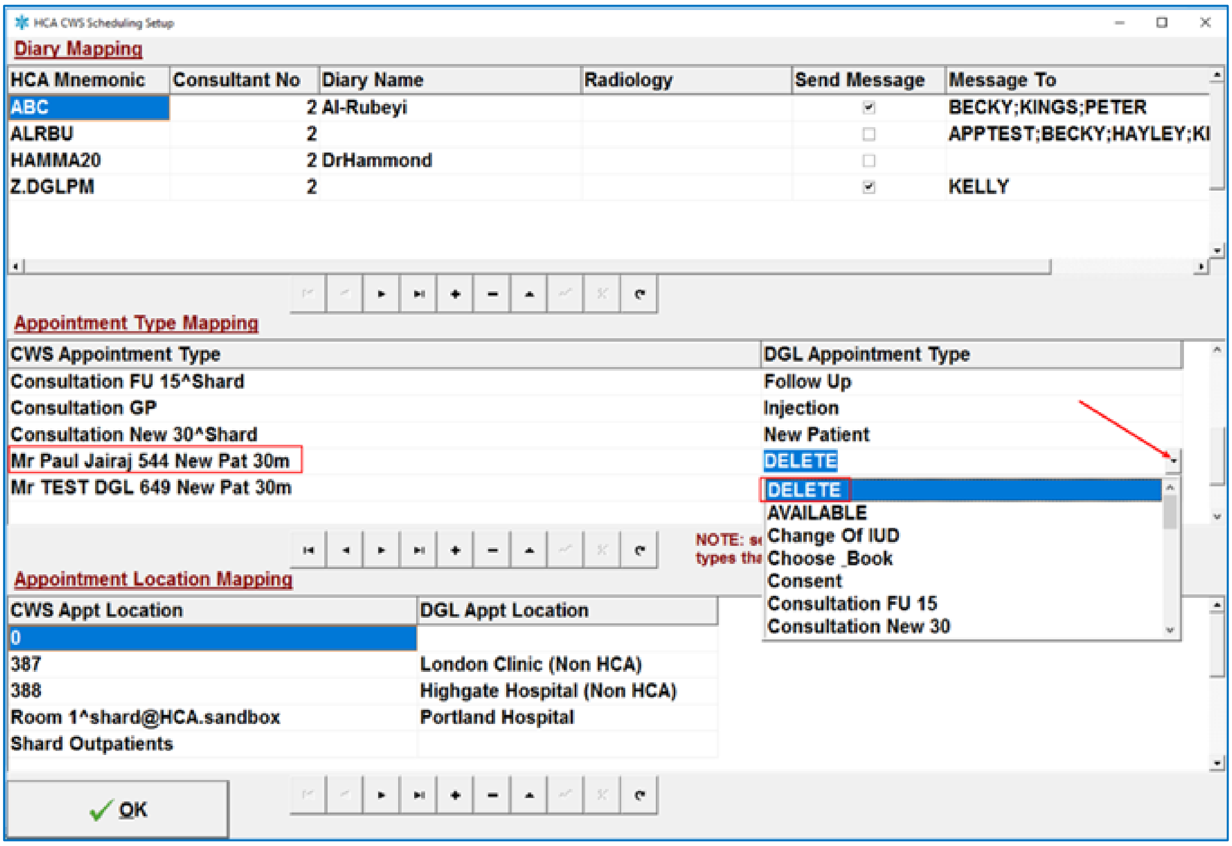


Next, a new window will appear, click “HCA CWS Scheduling Setup”



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)

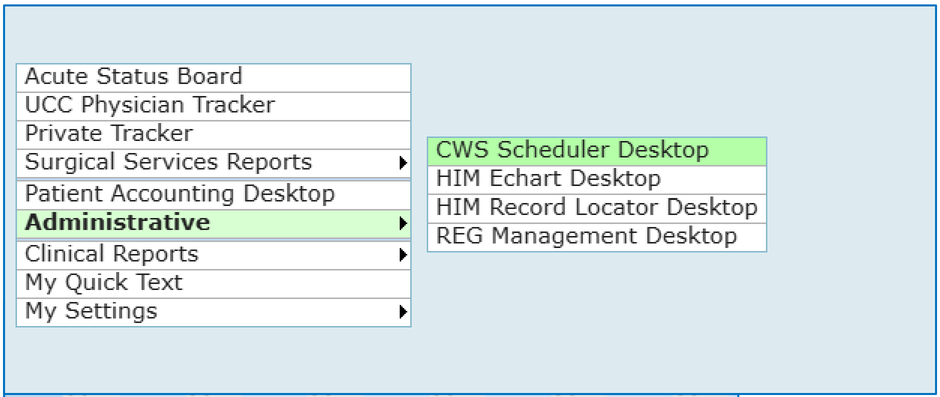


    - Once all desired changes have been made, click “OK”. This will close the dialogue box, and all newly imported appointments of that type will be automatically removed for the clinic list(s).

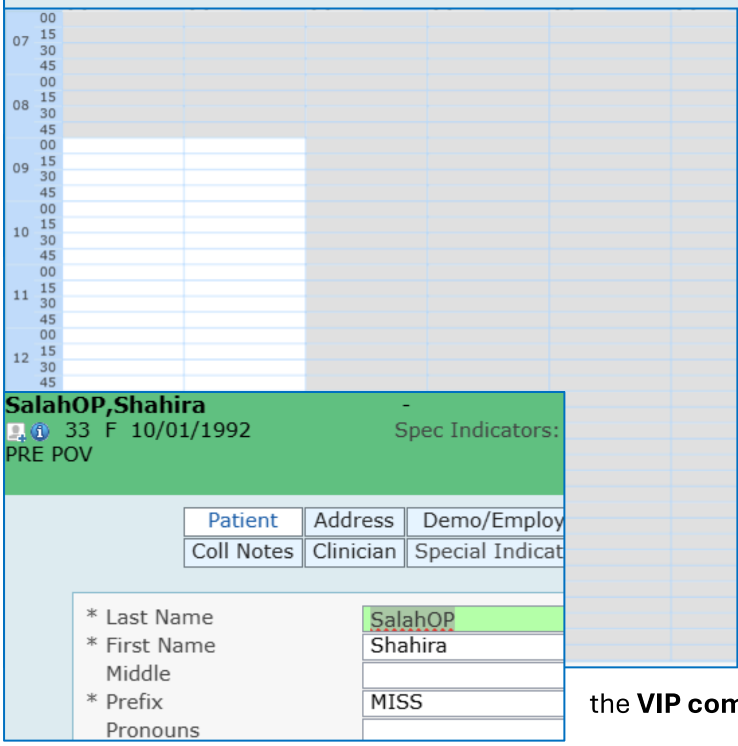
Patient Registration

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**.



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

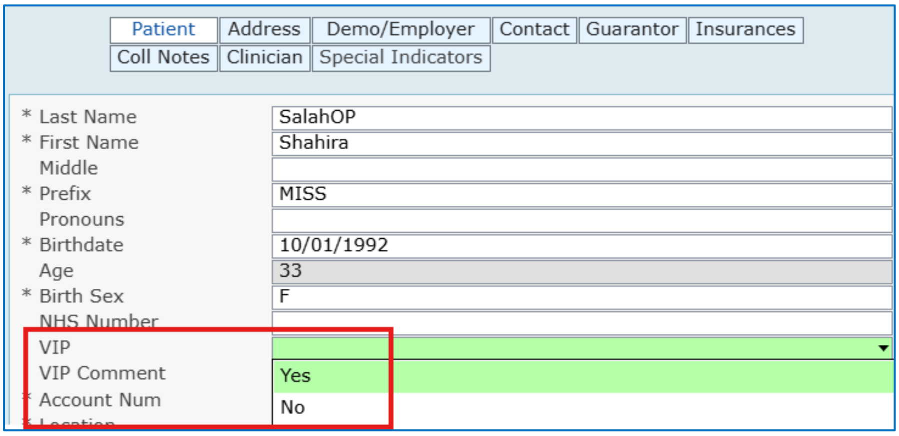


Choose **Pre-Register** from the **Function** menu.

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

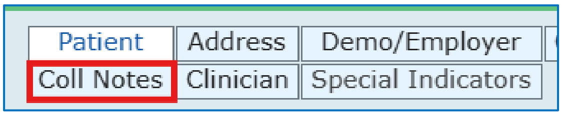
You should use this screen to input as much information as possible. For example, if the patient needs to be marked as **VIP,** you can use the **VIP field** to input **Yes or No** from the **LookUp** function and use the **VIP comment** field to input any information -

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

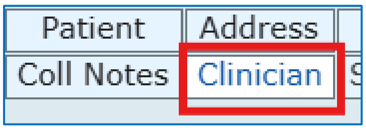


Note: Ensure to go through all the tabs to verify that all mandatory fields are completed.

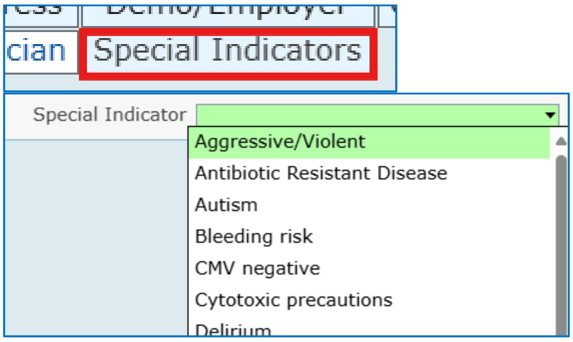
The **Coll Notes (collection notes)** tab can be used for any notes.



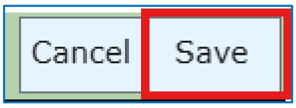
The Clinician tab is used to fill in GP details.



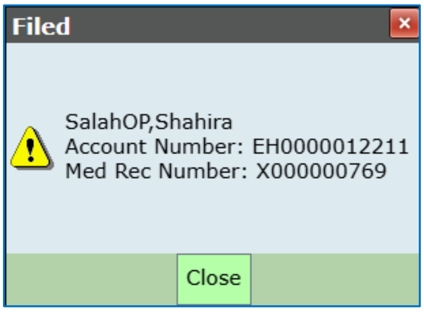
The Special Indicators tab is used to input **Safeguarding** data.



Click **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