Chapter 04 : Consultation page

Consultation page.

- How to open a consultation.
- Guide to consultation statuses.
- How to navigate the Consultation page.
- How to cancel a consultation.
- How to capture consultation vitals.
- Capturing billable items (within the Consultation page).
- How to view historic data (i.e. consultations, admissions, attachments and forms).
- How to start a consultation.
- Using writing pads to take capture consultation data (i.e. comments, notes and prescriptions).
- Using the keyboard to take capture consultation data (i.e. comments, notes and prescriptions).
- Adding a diagnosis.
- How to complete a consultation.
- How to discharge an admitted patient.
- How to create an appointment (from within the consultation page).
- Creating a referral letter.
- Transitioning an outpatient to an inpatient status.
- Transferring an admitted patient from one ward to another.

How to open a consultation.

> If a healthcare center **does not** offer admission services, the forthcoming explanation pertaining to the use of the terms **consultation** and **admission** within this manual may be disregarded. In such instances, any reference to admission within this manual would not be applicable to such a center.

In this manual, the term **consultation** serves as an umbrella term that includes both **consultations** and **admissions**. These two events are managed through a unified interface, with minor variations to accommodate their unique requirements (for instance, the admission interface incorporates a discharge button).

While the interface largely remains consistent, there are instances where differentiation becomes necessary. In such scenarios, the term Consultation is specifically used when the interface is accessed for an **inpatient**, while Admission refers to the interface as it appears for an **outpatient**. An inpatient is a patient who stays in the hospital for one or more nights while receiving treatment. On the other hand, an outpatient is a patient who visits a healthcare facility for diagnosis or treatment but does not stay overnight.

Instructions :

1. Go to the homepage and click a consultation from either the **pending** or **ongoing** tables, or open an admission from one of the **admission ward** tables.
2. When you click on a consultation from the **completed** or **discharged** tables, it will open in the Previous Consultation page instead of the usual Consultation page. To switch to the standard Consultation page view, scroll down to the bottom of the Previous Consultation page and hit the **Edit button**. The presence of the Edit button at the bottom signifies that the consultation was either completed or discharged in the past 48 hours.

Guide to consultation statuses.

> In this manual, the term **consultation** denotes both consultations and admissions, which are facilitated through a similar interface with minor variations. However, in certain contexts, the term **consultation** may specifically refer to inpatient scenarios, while **admission** is consistently used for outpatient situations.

A consultation can have one of the following statuses at any given time :

- **Pending :** When a consultation is first created and before a doctor starts it, it is marked as pending. These pending consultations are shown on the homepage (in the table on the far left) in chronological order, with the consultation created first at the top and the one created most recently at the bottom of the list.
- **Ongoing :** Once a consultation with a pending status is started, it transitions to an ongoing status. By default, starting a consultation necessitates the doctor to input a verification phrase to confirm that the correct consultation is being started. This verification phrase could be the consultation number, patient number, or the patient's national ID. However, there is an alternative setting that enables consultations to be automatically started without the requirement of a verification phrase, simply when the doctor opens the consultation. For more information on this system setting click here.
- **Completed :** On the homepage, they are displayed in the table on the extreme right, with the most recent consultation at the top and the earliest at the bottom. The homepage only features consultations completed on the present day and the previous day, on any given day.
- **Admitted :** These are consultations where the patient is allocated a bed and undergoes continuous treatment over a duration.
- **Discharged :** When a patient no longer needs to be admitted they are to be discharged. Discharged patients are displayed in the same list as completed consultations on the homepage.
- **Cancelled :** If a consultation is inadvertently set up, or if a patient no longer needs the consultation, an employee with the appropriate permissions can cancel it. However, only consultations that are currently in the pending status are eligible for cancellation. Also a consultation can only be cancelled if no billable items have been created within that consultation page.

How to navigate the Consultation page.

> In this manual, the term **consultation** denotes both consultations and admissions, which are facilitated through a similar interface with minor variations. However, in certain contexts, the term **consultation** may specifically refer to inpatient scenarios, while **admission** is consistently used for outpatient situations.

The Consulation page has 3 main sections :

- **Toolbar :** Usually positioned at the page's top, the toolbar offers rapid access to frequently used operations. All toolbar buttons have an icon and a label. The icon graphically signifies the button's function, simplifying the user's understanding of the action triggered by clicking the button. When the page is minimised, the button label is concealed, but icons remain visible at all times.
- **Blue ribbon :** Situated at the upper part of the page, directly beneath the toolbar. It is characterized by its blue background and extends across the entire width of the page. On the Consultation page, the Blue ribbon includes buttons that switch the view displayed in the Interactive space section. It also accommodates a flag switch that can make the consultation stand out in the homepage. For more details on a setting that determines whether or not the flag switch is displayed in the Blue ribbon, please click here.
- **Interactive space :** The central feature of the majority of pages, with only a handful of pages lacking this key component. It serves as a dynamic platform where users interact with a variety of functions specific to each page. Depending on the page, it might include elements such as tables, forms, views, buttons, and data displays. This adaptable and user-focused area is engineered to enable smooth interaction, positioning it as the core of the user's engagement with any page that has this section.

The consultation page offers the flexibility to capture consultation data via keyboard typing or through a writing pad for handwritten entries. The system features a setting that can either activate or deactivate the writing pad, depending on the user's preference. It's important to note that not all computers possess the required hardware to support input through a writing pad. For additional details on how to enable or disable the writing pad input for the Interactive Space views, please click here.

Many doctors favor the use of writing pads over keyboards for data capture, finding it more intuitive and convenient. This method also facilitates maintaining eye contact with patients, enhancing the personal touch during consultations. The **Interactive space** is designed to capture various types of consultation data, either through keyboard typing or using hand written notes via a writing pad. The types of consultation data captured using these methods include:

- **Comments** which consist of non-confidential information accessible to a broad range of hospital/clinic staff, such as nurses and nurse aides, and may include details like treatment instructions.
- **Notes,** on the other hand, contain sensitive information exclusively available to doctors. Any staff member not designated as a doctor in their employee role cannot access these notes.
- **Prescriptions** pertain to medication-related information and can be printed on official documents bearing the medical practice’s letterhead.

In the consultation page, the **Interactive space** features four distinct views, with navigation between them being facilitated by buttons located in the Blue ribbon section. At any given time, only one view is visible in the Interactive space. By clicking a button in the Blue ribbon, users can switch between different views within the Interactive space.

Here is a list of **Blue ribbon buttons,** and the views which they activate when they are clicked.

- **Dashboard :** This is the view displayed by default on opening a consultation page. It displays patient information, a summary of the captured vitals (e.g. temperature, blood pressure), and the five most recent timeline events (i.e. How to view a patient's historic data (i.e. previous consultations, previous admissions, attachments and forms).). The comments keyboard input is also part of the dashboard view.
- **Timeline :** This view is dedicated to displaying both historical and recently saved patient consultation data, divided into two main sections: recent data and historical events. The **recent data** section of the timeline view appears at the top and enumerates data gathered during that particular consultation, including comments, notes, and prescriptions, whether hand written or typed. Each piece of data is accompanied by a timestamp, indicating the employee who recorded the data and the time it was saved. The **historical data** section, located at the bottom of the same view, catalogs all events for that particular patient who is being consulted. This includes past consultations, admissions, attachments, and forms, providing a comprehensive historical record.
- **Keyboard inputs :** This view contains the three (3) separate inputs for capturing comments, notes and prescriptions via keyboard typing. This blue ribbon button (and the corresponding view) is not visible when a consultation is in **pending** status.
- **Writting pads (3 buttons) :** Located on the extreme right of the Blue ribbon, you will find three (3) distinct buttons, each dedicated to a writing pad. These writing pad buttons are labeled according to their corresponding consultation data types: comments, notes, and prescriptions. Clicking on any of these three (3) buttons opens the respective writing pad, allowing for the capture of handwritten notes. For additional guidance on navigating the writing pad and utilizing its various tools, please click here. These blue ribbon buttons (and their corresponding views) are not visible when a consultation is in **pending** status.

How to cancel a consultation.

Before proceeding with the instructions in this page it is crucial to familiarize yourself with the various **sections** of the consultation page (i.e. **toolbar, blue ribbon, and interactive space**) and to learn how to maneuver through the different **views** of the interactive space (i.e **dashboard, timeline, keyboard inputs, and writting pads**). If you are not yet acquainted with this information about the consultation page, please click here.

Consultations exist in the following statuses :

- **Pending :** When a consultation is first created and before a doctor starts it, it is marked as pending. These pending consultations are shown on the homepage (in the table on the far left) in chronological order, with the consultation created first at the top and the one created most recently at the bottom of the list.
- **Ongoing :** Once a consultation with a pending status is started, it transitions to an ongoing status. By default, starting a consultation necessitates the doctor to input a verification phrase to confirm that the correct consultation is being started. This verification phrase could be the consultation number, patient number, or the patient's national ID. However, there is an alternative setting that enables consultations to be automatically started without the requirement of a verification phrase, simply when the doctor opens the consultation. For more information on this system setting click here.
- **Completed :** On the homepage, they are displayed in the table on the extreme right, with the most recent consultation at the top and the earliest at the bottom. The homepage only features consultations completed on the present day and the previous day, on any given day.
- **Admitted :** These are consultations where the patient is allocated a bed and undergoes continuous treatment over a duration.
- **Discharged :** When a patient no longer needs to be admitted they are to be discharged. Discharged patients are displayed in the same list as completed consultations on the homepage.
- **Cancelled :** If a consultation is inadvertently set up, or if a patient no longer needs the consultation, an employee with the appropriate permissions can cancel it. However, only consultations that are currently in the pending status are eligible for cancellation. Also a consultation can only be cancelled if no billable items have been created within that consultation page.

Only **pending** consultations can be cancelled.

Instructions :

1. Go to the homepage and click a consultation from either the **pending** or **ongoing** tables, or open an admission from one of the **admission ward** tables.
2. Click the Cancel cons. toolbar button.
3. A dialogue will then appear on the Consultation page, requesting your confirmation if you truly wish to cancel the consultation. To proceed with the initiated action, click **Ok** in the dialogue.

How to capture consultation vitals.

Instructions :

1. Go to the homepage and click a consultation from either the **pending** or **ongoing** tables, or open an admission from one of the **admission ward** tables.
2. Click the Vitals toolbar button to open the Vitals page.
3. Once the Vitals page is open, fill in any relevant vitals information.
4. Click the Save footer button in the Vitals page to complete the process.

Capturing billable items (within the Consultation page).

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The following instructions apply to billing a patient. This refers to the capturing of services and/or inventory items used for a patient. Such billing can be captured from the Patients page, or from within a consultation.

1. Go to the homepage and click a consultation from either the **pending** or **ongoing** tables, or open an admission from one of the **admission ward** tables.
2. Click the Billable Items toolbar button to open the Billable Items page.
3. If your system is set up to use a single practice number (AHFOZ number), the Payments page will open. However, if your system is configured to use multiple practice numbers (AHFOZ numbers), the Practice Number Selection page will appear instead.
   In this page, you will need to enter a valid practice number (AHFOZ number) and then click the Next toolbar button. If the practice number entered is valid, the Practice Number Selection page will close. If the number is not valid, the input field will reset, allowing you to try entering the practice number again. Once the correct practice number has been entered, the Payments page will open.
4. Search for a service/item using the Code/Descr input. With each keypress the dropdown filters to only diplay services/items whose code, description or tariff code matches the search phrase. Select a service/item from the dropdown by :
   - Clicking "Enter" keyboard button to select the top-most option on the dropdown.
   - Use the mouse to select any visible option from the dropdown.
5. Depending on your system settings, the sales price input can be editable.
6. **Add button :** Click to add another service/item to the cart. This button has an add icon.
7. **Retrieve button :** Opens a window showing a list of previously saved carts. Once retrieved, a saved cart/list can be modified then processed. Lists can also be retrieved from documents. For instructions on retrieving a cart from a document click here.

The retrieve button has a hamburger/list icon.

8. **Save button :** It is designed to temporarily store the current cart. Saving allows you to retrieve and modify your cart's contents at a later time before final processing. It's important to note that saving is distinct from processing. While saved billable items represent temporary states, processed transactions are permanently stored in the database.
   The save button has a floppy dist icon.
9. **Process button :** To process/complete the transaction click the Process footer button (button with a receipt icon at the far right of the footer).
   The process button has a receipt icon, and is found at the far right of the footer.

How to view historic data (i.e. consultations, admissions, attachments and forms).

Before proceeding with the instructions in this page it is crucial to familiarize yourself with the various **sections** of the consultation page (i.e. **toolbar, blue ribbon, and interactive space**) and to learn how to maneuver through the different **views** of the interactive space (i.e **dashboard, timeline, keyboard inputs, and writting pads**). If you are not yet acquainted with this information about the consultation page, please click <u>here</u>.

Doctors find it beneficial to review a patient’s history as it guides the optimal treatment plan. The most efficient method to retrieve this historical data within a consultation page is through the **timeline view**. This view presents all recorded events for a specific patient, organized by year, providing a comprehensive record. Alternatively, the **dashboard view** offers a snapshot of the patient’s history, displaying only the five most recent events.

To open the **timeline view** do the following :

1. Go to the homepage and click a consultation from either the **pending** or **ongoing** tables, or open an admission from one of the **admission ward** tables.
2. Click the timeline blue ribbon button.
3. The **recent data** section of the timeline view appears at the top and enumerates data gathered during that particular consultation, including comments, notes, and prescriptions, whether hand written or typed. Each piece of data is accompanied by a timestamp, indicating the employee who recorded the data and the time it was saved.
4. The **historical data** section, located at the bottom of the same view, catalogs all events for that particular patient who is being consulted. This includes past consultations, admissions, attachments, and forms, providing a comprehensive historical record.

To view the patient history via the **dashboard view** do the following :

1. Go to the homepage and click a consultation from either the **pending** or **ongoing** tables, or open an admission from one of the **admission ward** tables.

2. The **dashboard view** is the default display in the Interactive space. If it is not currently visible, you can bring it into focus by clicking on the **dashboard button** in the Blue ribbon.
3. On the far right side of the dashboard view, there’s a table which provides a brief look at the patient’s past by showing the five latest events.

How to start a consultation.

Before proceeding with the instructions in this page it is crucial to familiarize yourself with the various **sections** of the consultation page (i.e. **toolbar, blue ribbon, and interactive space**) and to learn how to maneuver through the different **views** of the interactive space (i.e **dashboard, timeline, keyboard inputs, and writting pads**). If you are not yet acquainted with this information about the consultation page, please click here.

Consultations exist in the following statuses :

- **Pending :** When a consultation is first created and before a doctor starts it, it is marked as pending. These pending consultations are shown on the homepage (in the table on the far left) in chronological order, with the consultation created first at the top and the one created most recently at the bottom of the list.
- **Ongoing :** Once a consultation with a pending status is started, it transitions to an ongoing status. By default, starting a consultation necessitates the doctor to input a verification phrase to confirm that the correct consultation is being started. This verification phrase could be the consultation number, patient number, or the patient's national ID. However, there is an alternative setting that enables consultations to be automatically started without the requirement of a verification phrase, simply when the doctor opens the consultation. For more information on this system setting click here.
- **Completed :** On the homepage, they are displayed in the table on the extreme right, with the most recent consultation at the top and the earliest at the bottom. The homepage only features consultations completed on the present day and the previous day, on any given day.
- **Admitted :** These are consultations where the patient is allocated a bed and undergoes continuous treatment over a duration.
- **Discharged :** When a patient no longer needs to be admitted they are to be discharged. Discharged patients are displayed in the same list as completed consultations on the homepage.
- **Cancelled :** If a consultation is inadvertently set up, or if a patient no longer needs the consultation, an employee with the appropriate permissions can cancel it. However, only consultations that are currently in the pending status are eligible for cancellation. Also a consultation can only be cancelled if no billable items have been created within that consultation page.

Instructions :

1. Go to the homepage and click a consultation from either the **pending** or **ongoing** tables, or open an admission from one of the **admission ward** tables.
2. Click the Start toolbar button. This opens the Verify consultation Page.
3. Type any of the following variables to confirm the consultation:

- Consultation number
- Patient number
- Patient national ID

4. Click the Next footer button, or click the Enter keyboard button to submit the confirmation variable.
5. If the correct information is entered, then the consultation is updated from being in the **pending** status, to the **ongoing** status.

Using writing pads to take capture consultation data (i.e. comments, notes and prescriptions).

Before proceeding with the instructions in this page it is crucial to familiarize yourself with the various **sections** of the consultation page (i.e. **toolbar, blue ribbon, and interactive space**) and to learn how to maneuver through the different **views** of the interactive space (i.e **dashboard, timeline, keyboard inputs, and writting pads**). If you are not yet acquainted with this information about the consultation page, please click here.

Before you follow the steps on this page, it is important to grasp the various consultation statuses : **pending, ongoing, completed, admitted, discharged, and cancelled.** Understanding these consultation statuses is key to effectively navigating the instructions. Click here to read more about this.

> In this manual, the term **consultation** denotes both consultations and admissions, which are facilitated through a similar interface with minor variations. However, in certain contexts, the term **consultation** may specifically refer to inpatient scenarios, while **admission** is consistently used for outpatient situations.

Instructions :

1. Go to the homepage and click a consultation from either the **pending** or **ongoing** tables, or open an admission from one of the **admission ward** tables.
2. The next steps of the instructions require that the consultation be either in **ongoing, completed or admitted** statuses.
3. Click one of the writing pad blue ribbon buttons (i.e. comments, notes, or prescription) to open the appropriate writing pad.
4. Once the writing pad is open, write or draw on the blank canvas just as you would on paper.
5. **Clear canvas button :** The icon for this button is a trash can. When clicked, it erases all drawings or writings on the current page. If the current page is empty and there are

multiple pages in the writing pad, clicking this button will remove the current page.

6. **Ink colour selector button :** This button is represented by an icon of three crayons. Upon clicking it, three color options (black, red, and blue) appear at the top center of the screen. You can select an ink color by clicking on one of these options. Once a color is chosen, the top section of the writing pad view reverts to its original state. The default ink colour is black.
7. **Line thickness selector button :** This button features an icon of a pen sketching a line. When you click it, three options for line thickness (size 1, 2, and 3) will appear at the top center of the screen. You can choose a line thickness by selecting one of these options. After a thickness is selected, the top section of the writing pad view returns to its default state. The standard line thickness is set to size 1.
8. **Writing pad forms button :** This button, represented by an icon of several sheets, reveals writing pad form options at the top center of the screen when clicked. You can choose a writing pad form from the available pre-configured forms. If there are no pre-configured forms, please reach out to technical support to have suitable forms configured in the system.
9. **Eraser button :** This button, symbolized by an eraser icon, transforms the pen tip into an eraser when clicked. To switch back to the pen tip, simply click the eraser button again.
10. **Page navigation arrow buttons :** On the bottom left of a writing pad, there is a left arrow button, and on the bottom right, a right arrow button. These buttons are for moving through the pages of the writing pad. To add a new page to the writing pad click the right arrow button while on the last writing pad page.
11. **Save button :**This button is represented by a floppy disk. After you have entered sufficient data into the writing pad, click the save button located at the upper right corner of the writing pad. This action will **temporarily store** your hand written data and close the writing pad, returning you to the last view you were on before opening the writing pad (such as the dashboard, timeline, or keyboard inputs views). To **permanently store** the data from the writing pad, you will need to **click either the Save or Complete toolbar button** found on the toolbar of the consultation page.
12. **Cancel button :** Located at the upper right corner of the writing pad, this button, when pressed, will erase any data previously written and close the pad, taking you back to the view you were on before you opened the writing pad.
13. To store consultation data in the database permanently, you can choose one of the following actions :
    - Click the Save toolbar button. This will store all unsaved consultation data into the database. Upon successful saving, a popup message will appear to confirm the action. By clicking **Ok** on this popup, the consultation page will refresh. The saved data can then be accessed from the timeline view, and it is displayed with a timestamp showing the employee who saved it and the date and time of saving. (N.B. **once saved, consultation data cannot be modified**).
    - Click the Complete toolbar button. This will store all unsaved consultation data into the database. Upon successful saving, a popup message will appear to confirm the action. By clicking **Ok** on this popup, the consultation page will refresh. The saved data can then be accessed from the timeline view, and it is displayed with a timestamp showing the employee who saved it and the date and time of saving. (N.B. **once saved, consultation data cannot be modified**).

Using the keyboard to take capture consultation data (i.e. comments, notes and prescriptions).

Before proceeding with the instructions in this page it is crucial to familiarize yourself with the various **sections** of the consultation page (i.e. **toolbar, blue ribbon, and interactive space**) and to learn how to maneuver through the different **views** of the interactive space (i.e **dashboard, timeline, keyboard inputs, and writting pads**). If you are not yet acquainted with this information about the consultation page, please click here.

Before you follow the steps on this page, it is important to grasp the various consultation statuses : **pending, ongoing, completed, admitted, discharged, and cancelled.** Understanding these consultation statuses is key to effectively navigating the instructions. Click here to read more about this.

> In this manual, the term **consultation** denotes both consultations and admissions, which are facilitated through a similar interface with minor variations. However, in certain contexts, the term **consultation** may specifically refer to inpatient scenarios, while **admission** is consistently used for outpatient situations.

Instructions :

1. Go to the homepage and click a consultation from either the **pending** or **ongoing** tables, or open an admission from one of the **admission ward** tables.
2. The next steps of the instructions require that the consultation be either in **ongoing, completed or admitted** statuses.
3. Click the **keyboard inputs** button in the blue ribbon, which opens the keyboard inputs view.
4. Each keyboard input (i.e. **comments, notes and prescription**) is labelled, allowing for the capturing of any relevant information.
5. To store consultation data in the database permanently, you can choose one of the following actions :

- Click the Save toolbar button. This will store all unsaved consultation data into the database. Upon successful saving, a popup message will appear to confirm the action. By clicking **Ok** on this popup, the consultation page will refresh. The saved data can then be accessed from the timeline view, and it is displayed with a timestamp showing the employee who saved it and the date and time of saving. (N.B. **once saved, consultation data cannot be modified**).
- Click the Complete toolbar button. This will store all unsaved consultation data into the database. Upon successful saving, a popup message will appear to confirm the action. By clicking **Ok** on this popup, the consultation page will refresh. The saved data can then be accessed from the timeline view, and it is displayed with a timestamp showing the employee who saved it and the date and time of saving. (N.B. **once saved, consultation data cannot be modified**).

Adding a diagnosis.

To add a diagnosis do the following :

1. Go to the homepage and click a consultation from either the **pending** or **ongoing** tables, or open an admission from one of the **admission ward** tables.
2. Click the More toolbar button. This moves the toolbar one level down to expose a different set of toolbar buttons.
3. Click the Diagnosis toolbar button to open the Diagnosis page.
4. On the Diagnosis page, the first input you will encounter is for the diagnosis stage. Please choose one of the following :
   - Primary
   - Secondary
   - Co-morbidity
   - Complicated
5. On the Diagnosis page, the second input is the diagnosis code/description filter input. Type a code or a description to filter through the World Health Organisation's ICD-10 diagnoses.
   N.B. The filter only starts to display a dropdown **after the third character is typed into the filter input.** i.e. In searching for Cholera as a diagnosis, the dropdown will only be displayed after you have typed the C, the H and the O. Before those initial 3 characters no dropdown list will be shown.
   N.B. Each time you press a key on your keyboard, the diagnoses dropdown list is refined according to the search phrase entered in the code/description filter. Given the extensive number of diagnoses in the system, **you may experience a slight delay** in your computer’s response as it processes the filter.
6. Select a diagnosis from the dropdown by :
   - Clicking "Enter" keyboard button to select the top-most diagnosis on the dropdown.
   - Use the mouse to select any visible diagnosis from the dropdown.

7. **Add footer button :** Pressing this button adds the currently chosen diagnosis to the list and resets the page inputs, preparing them for the selection of an additional diagnosis. This button facilitates the selection of multiple diagnoses.
8. **Next footer button :** Once a minimum of one diagnosis has been chosen, the Next footer button will illuminate in green. To save the chosen diagnoses to the database, please click on the green Next footer button.

How to complete a consultation.

Before you follow the steps on this page, it is important to grasp the various consultation statuses : **pending, ongoing, completed, admitted, discharged, and cancelled.** Understanding these consultation statuses is key to effectively navigating the instructions. Click here to read more about this.

Completing a consultation changes its status from **ongoing** to **completed**.

Instructions :

1. Go to the homepage and click a consultation from either the **pending** or **ongoing** tables, or open an admission from one of the **admission ward** tables.
2. Click the Complete toolbar button. Only **ongoing** or **completed** consultations can be completed. Completing an already complete consultation just saves any updates that would have been made to said consultation.
3. A dialogue will then appear on the Consultation page, requesting your confirmation if you truly wish to complete the consultation. To proceed with the initiated action, click **Ok** in the dialogue.

How to discharge an admitted patient.

Before you follow the steps on this page, it is important to grasp the various consultation statuses : **pending, ongoing, completed, admitted, discharged, and cancelled.** Understanding these consultation statuses is key to effectively navigating the instructions. Click here to read more about this.

Discharging a consultation changes its status from **admitted** to **discharged**.

Instructions :

1. Go to the homepage and click a consultation from either the **pending** or **ongoing** tables, or open an admission from one of the **admission ward** tables.
2. Click the Discharge toolbar button. Only **admitted** patients can be discharged. Discharging an already discharged patient just saves any updates that would have been made to the admission.
3. A dialogue will then appear on the Consultation page, requesting your confirmation if you truly wish to discharge the patient. To proceed with the initiated action, click **Ok** in the dialogue.

How to create an appointment (from within the consultation page).

An appointment can be created from the Patients page, or from within the Consultation page.

Instructions :

1. Go to the homepage and click a consultation from either the **pending** or **ongoing** tables, or open an admission from one of the **admission ward** tables.
2. Click the More toolbar button. This moves the toolbar one level down to expose a different set of toolbar buttons.
3. Open the Appointment page by clicking the Appointment toolbar button.
4. Enter the patient’s name in the first input field.
5. Select a doctor from the second input field, the doctor selector.
6. Set the appointment’s start time using the date and time input, which is the last input field in the Appointment page.
7. Click the Save toolbar button to save the appointment.
8. To view the list of scheduled appointments, go to the homepage and do one of the following :
    - Click the Calendar button on the toolbar.
    - Or, use the compact table at the bottom of the homepage to scroll through upcoming appointments. The appointments are listed in chronological order, with the one starting next at the top.

Creating a referral letter.

Instructions :

1. Go to the homepage and click a consultation from either the **pending** or **ongoing** tables, or open an admission from one of the **admission ward** tables.
2. Click the More toolbar button. This moves the toolbar one level down to expose a different set of toolbar buttons.
3. Click the Referral Letter toolbar button to open the Referral Letter page.
4. Enter the content of the referral letter into the provided text box located within the Referral Letter window. Please note that certain information will be automatically incorporated into the referral letter. This information will appear automatically just above the content you input into the text box :
   - Patient full name.
   - Medical aid society (for medical aid patients)
   - Medical aid number (for medical aid patients)
   - Medical aid suffix (for medical aid patients)
   - Medical practice name and number
   - Birthdate (if specified on patient record creation)
   - Age (if the birthdate is available)
5. Click the Print toolbar button in the Referral Letter page to print and save the referral letter.
6. A notification will then appear on the Consultation page, confirming the successful saving of the referral letter. To update the Consultation page, click **Ok** in the notification. Please note that any unsaved data on the Consultation page, such as comments, notes, or prescriptions, will be automatically saved before the page refreshes.
7. To view the referral letter, navigate to the timeline view of the refreshed consultation. This can be done by clicking the blue ribbon button labeled timeline. Once in the timeline view, you will find the referral letter at the top, as it represents the most recent event or attachment associated with the patient.

Transitioning an outpatient to an inpatient status.

> If a healthcare center **does not** offer admission services, the forthcoming explanation pertaining to the use of the terms **consultation** and **admission** within this manual may be disregarded. In such instances, any reference to admission within this manual would not be applicable to such a center.

In this manual, the term **consultation** serves as an umbrella term that includes both **consultations** and **admissions**. These two events are managed through a unified interface, with minor variations to accommodate their unique requirements (for instance, the admission interface incorporates a discharge button).

While the interface largely remains consistent, there are instances where differentiation becomes necessary. In such scenarios, the term Consultation is specifically used when the interface is accessed for an **inpatient**, while Admission refers to the interface as it appears for an **outpatient**. An inpatient is a patient who stays in the hospital for one or more nights while receiving treatment. On the other hand, an outpatient is a patient who visits a healthcare facility for diagnosis or treatment but does not stay overnight.

Instructions :

1. Go to the homepage and click a consultation from either the **pending** or **ongoing** tables, or open an admission from one of the **admission ward** tables.
2. Click the More toolbar button. This moves the toolbar one level down to expose a different set of toolbar buttons.
3. Click the Admission toolbar button to expose the admission option buttons.
4. Select the appropriate option button, which has been pre-set the technical support team. Each button is configured with specific data, such as:
   - The cash portion of the transaction (applicable for both cash and medical aid patients)
   - The claimable portion of the transaction (only for medical aid patients)

   If you cannot find a button that corresponds to the type of consultation or admission you wish to create, please reach out the technical support team for assistance.
5. If your system is set up to use a single practice number (AHFOZ number), the Payments page will open. However, if your system is configured to use multiple practice numbers (AHFOZ numbers), the Practice Number Selection page will appear instead.

In this page, you will need to enter a valid practice number (AHFOZ number) and then click the Next toolbar button. If the practice number entered is valid, the Practice Number Selection page will close. If the number is not valid, the input field will reset, allowing you to try entering the practice number again. Once the correct practice number has been entered, the Payments page will open.

6. **Payment page :** The Payment page only opens on computers where the **Payment processing setting** is activated. If this setting is deactivated, transactions are processed on a credit basis (applicable only for patients with an enabled credit status), and subsequently, the Change page momentarily opens in place of the Payment page. For further details on the Payment processing setting, please click here.
   The Payment page facilitates the recording of transactions in either a single or multiple currencies, utilizing the system’s three payment methods. These payment methods are :
   - Cash
   - Electronic (i.e. bank transfers, mobile money transfers)
   - Credit

   Upon capturing of the full payment, the Process button becomes green and triggers automatically. If the patient is on a medical aid policy, and the transaction being processed includes at least one claim, then the next window which opens is the Claimable Items page. Otherwise the Change page opens.
   In the case that the Claimable Items page is opened, click here for instructions as to how to complete it.
   Ultimately, whether the Claimable Items page is first opened or not, the payment capturing process ends with the opening of the Change page.
   Click here for more information on the Payment page.

Transferring an admitted patient from one ward to another.

> If a healthcare center **does not** offer admission services, the forthcoming explanation pertaining to the use of the terms **consultation** and **admission** within this manual may be disregarded. In such instances, any reference to admission within this manual would not be applicable to such a center.

In this manual, the term **consultation** serves as an umbrella term that includes both **consultations** and **admissions**. These two events are managed through a unified interface, with minor variations to accommodate their unique requirements (for instance, the admission interface incorporates a discharge button).

While the interface largely remains consistent, there are instances where differentiation becomes necessary. In such scenarios, the term Consultation is specifically used when the interface is accessed for an **inpatient**, while Admission refers to the interface as it appears for an **outpatient**. An inpatient is a patient who stays in the hospital for one or more nights while receiving treatment. On the other hand, an outpatient is a patient who visits a healthcare facility for diagnosis or treatment but does not stay overnight.

Instructions :

1. Go to the homepage and click a consultation from either the **pending** or **ongoing** tables, or open an admission from one of the **admission ward** tables.
2. Click the More toolbar button. This moves the toolbar one level down to expose a different set of toolbar buttons.
3. Click the Ward Transfer toolbar button to open the Ward Selector page.
4. Search and select a ward using the input on the Ward Selector page.
5. To complete the ward transfer, click the Next toolbar button.
6. A notification will then appear on the Consultation page, confirming the successful ward transfer. To update the Consultation page, click **Ok** in the notification. Please note that any unsaved data on the Consultation page, such as comments, notes, or prescriptions, will be automatically saved before the page refreshes.