Appointments

Appointments can be booked up to twelve months ahead as a clinic appointment or as an ad hoc appointment. Group appointments are set up from **Groups** > **Groups Worklist** (**Group Appointments QRC**)

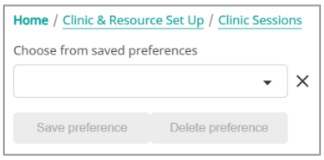
Clinics are set up by a MyWai Administrator, then clinic sessions are created based on the clinic settings.

Add a Clinic

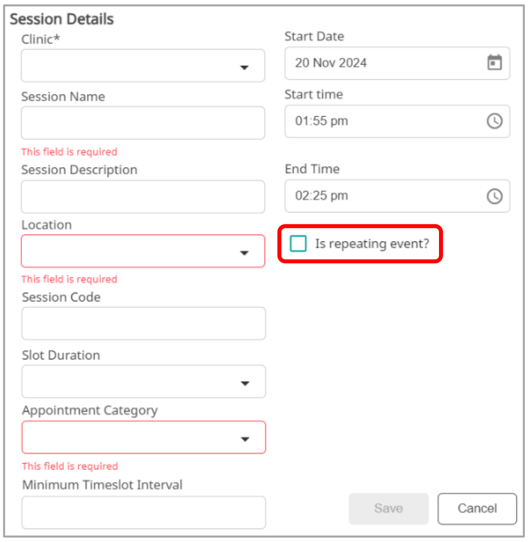
Using an admin access position, go to **Organisation** > **Clinics** > **Add** > add the name of the clinic > **Organisation** > add **Clinicians** > **Save**. Please follow existing filenaming conventions for the naming of clinics.

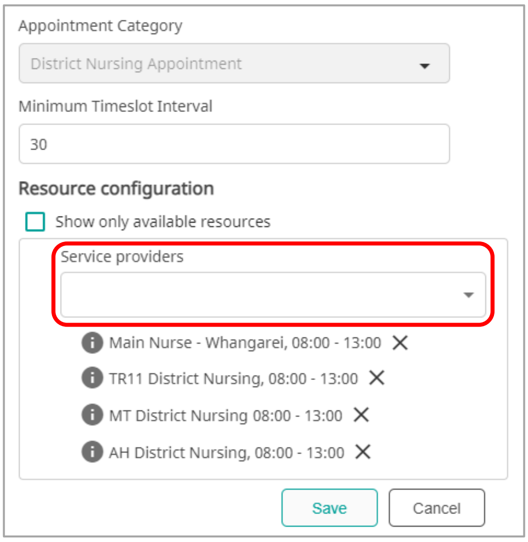
Regular Clinic and Resource Set Up

1. From **Clinic and Resource Set Up**, click **Clinic Session**, then click **+Clinic Session** to create a new Clinic Session as required.



2. Select the appropriate clinic, customise the Session Name if required, then complete the mandatory and useful fields – remember to tick **repeating event** if required
3. Click **Save** – scroll down to the resource configuration at the bottom of the screen, to add the **Care Provider**/s for each clinic session





4. **Save** again
5. In the clinic session, click **Actions**, then **Activate** the clinic session

District Nurse Clinic Sessions

District Nurses use specific District Nurse clinics filled with District Nurse appointment types. Appointments can be booked as **Draft Appointments** from the **Clinic Sessions**.

For District Nurse Home Visit appointments, the **Draft Appointments** are ALL booked for the **Main Nurse Resource**, and the **Draft Appointments** can be dragged over to the calendar for the District Nurse who will see that Person. Once in the appropriate place and time, the Draft Appointments are Confirmed as Booked.

Book Appointments from Active Worklist or My Caseload

From **Active Worklist** OR **My Caseload**, click **+** to **Add** an Appointment

Select **Clinic** (or **Ad Hoc**) appointment, complete the appointment details and Submit

Book Appointments from the clinic calendar

From **Clinic and Resource Set Up**, click **Clinic Session**, then search for the required clinic session.

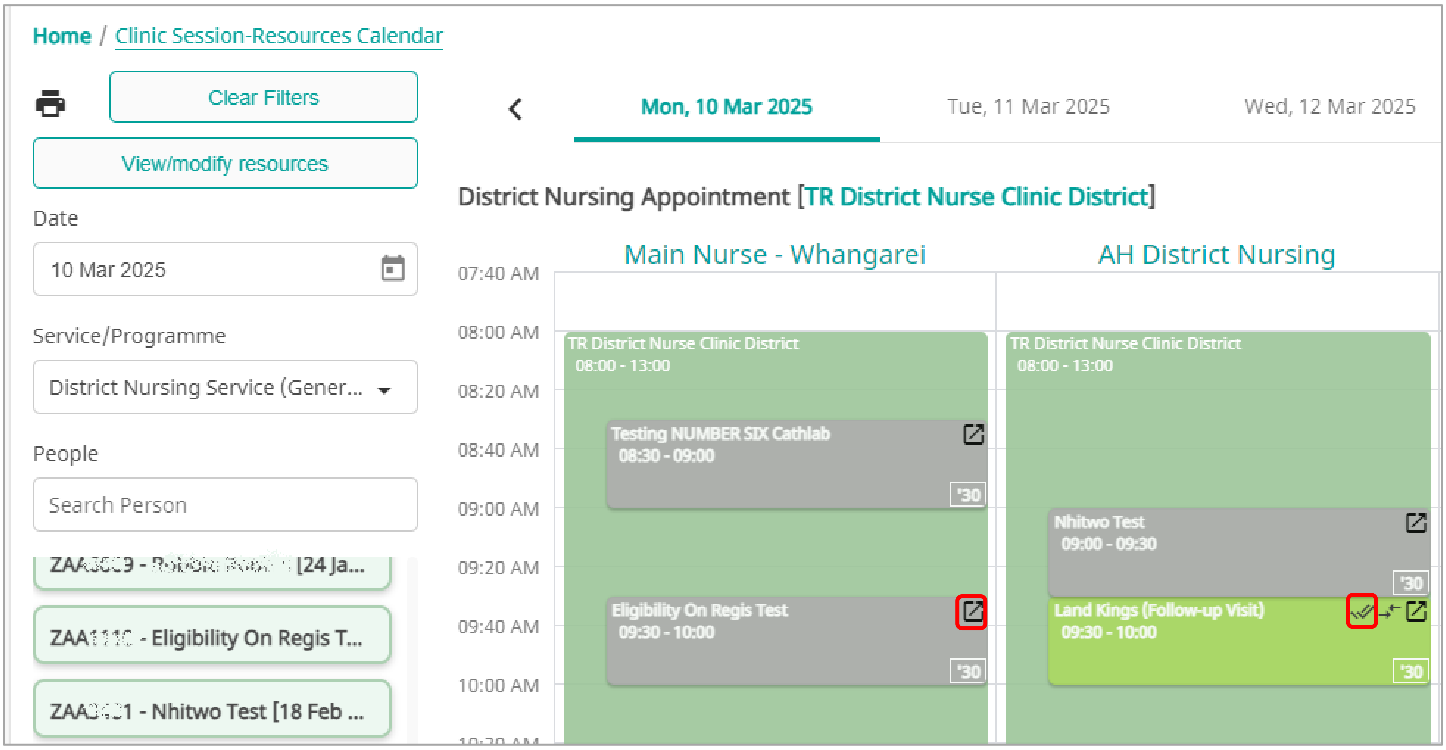
Scroll across to the FAR RIGHT and click on the Calendar view icon, select the required day for the clinic session, then select the resource from the drop down to display patient names for booking.

Search for a patient by name or NHI, then drag the name over to the resource calendar, select **Duration**, **Save**, then select **Create Draft.**

Grey Draft Appointments can be dragged to a different time or moved to a different resource, then when they are in the correct place, the appointment can be booked/confirmed.

Draft Appointments can be Booked or Discarded – double click to see options.

Once booked, an appointment can ONLY be **Cancelled** (or sometimes **Rescheduled**) – double click for options.

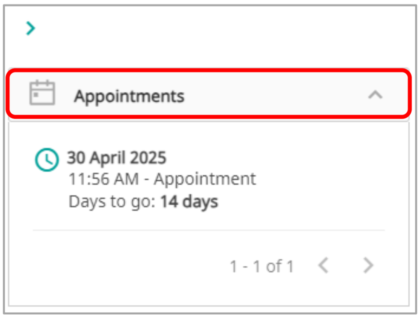


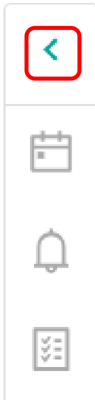
View and Book Appointments from the Person Dashboard

1. From the far right of the **Person Dashboard**, click the arrow to expand a far-right menu

   Select **Appointments** to see all upcoming appointments scheduled in MyWai for this person

   This allows visibility of appointments from all MyWai services, in order to avoid a clash if booking from inside or outside of MyWai





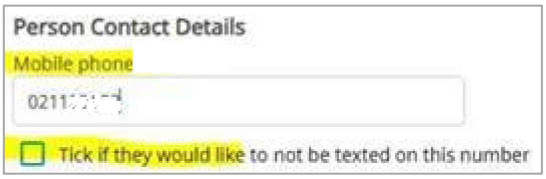
2. From the **Service** workspace in the **Person Dashboard**, select **Events and Appointments**, then click **Appointments**

   View current scheduled appointments (which can be cancelled, rescheduled or marked with an outcome) AND Book clinic or ad hoc appointments OR add an appointment request (appointment requests are displayed in the **Appointment Waitlist** in the top MyWai menu)

TXT messaging

For text messaging to go ahead, make sure that:

1. This tick box is EMPTY



2. AND the SMS tick box is ticked

Marking Attendance

There are several places where the attendance outcome can be recorded using

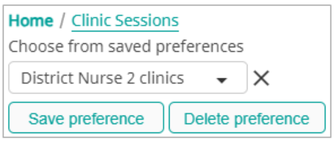
- From the Appointment Worklists (**Upcoming Appointments**)
- From a **clinic calendar** – use to record attendance; use to open the **Person Dashboard**
- From a Person's Service workspace in the Events and **Appointments**

Once an appointment has an attendance recorded against it, regardless of what it is, that appointment CANNOT be edited – the attendance can be changed from one option to another, but it cannot be removed. So therefore, the appointment cannot then be **Cancelled** or **Rescheduled**.

Saved Preferences

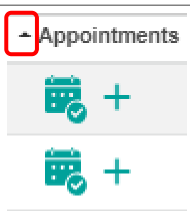
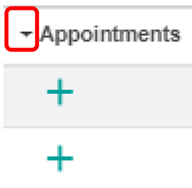
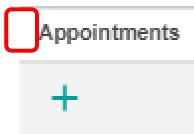
Set the filters you would like to use regularly

#	Session Name	Clinic	Description	Location Name	Status	Start Date	End Date	Session Code	Appointment Category
	Session Name	TR District Nurs...	Description	Location Name	Active	Start	End	Session Code	
1	TR District Nursing Clinic Reg	TR District Nursing	TR District Nursing Clinic Reg	Whangarei	ACTIVE	31-01-2025 08:00	31-03-2025 23:59		Regular Appointment
2	TR District Nurse Clinic District	TR District Nurse Clinic District	TR District Nurse Clinic District	Whangarei	ACTIVE	18-02-2025 08:00	31-03-2025 23:59		District Nursing Appointmen



Check for people with NO future appointments booked

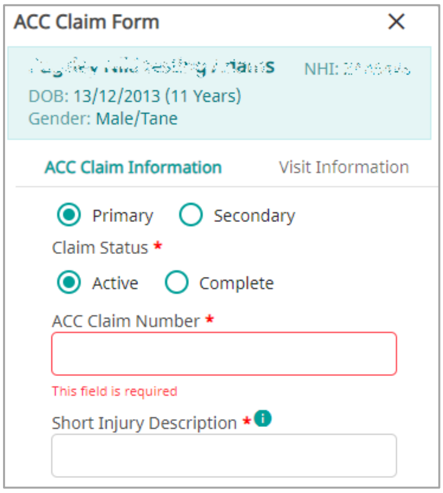
From the **Active Worklist**, click the **Appointments** column heading to sort by booked appointment:

Click **ONCE** to sort all records **WITH** a booked future appointment at the top of the column	Click **AGAIN** to sort all records with **NO** booked future appointment at the top of the column	Click AGAIN to reset the list back to alphabetic by name
		

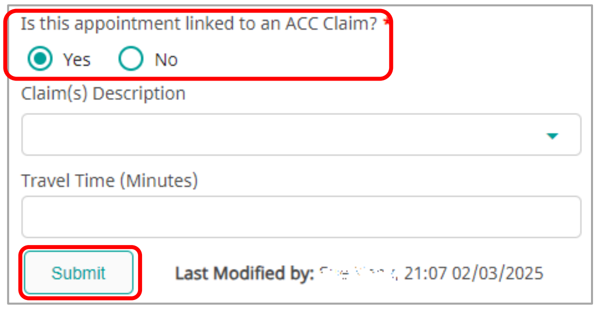
ACC Claims and ACC Appointments

1. In the **Person Dashboard**, from the horizontal menu, click **ACC Claims** to add a claim manually

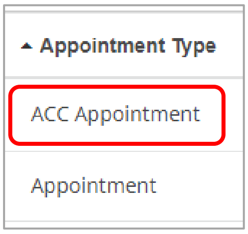
2. Add the details and click **Next**, then when completed, click **Submit**



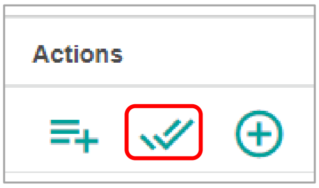
3. Once added, when booking an appointment, the last question in the booking form is about linking this appointment to an ACC Claim. Select **Yes**, then select the appropriate ACC Claim to link them together.



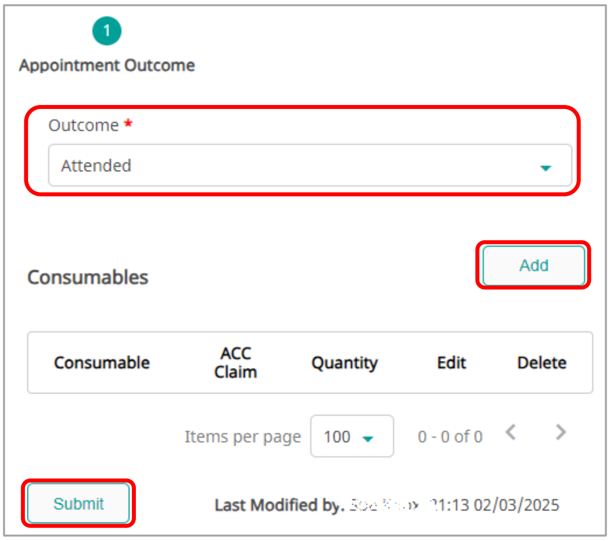
4. In the **Upcoming Appointments** worklist, ACC Appointments are identified in the **Appointment Type** column



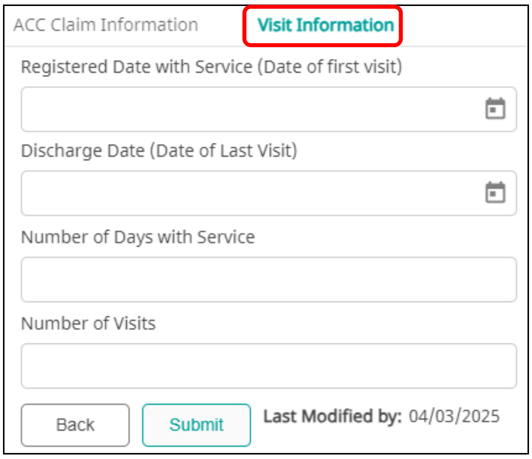
5. From the **Actions** column, click the two ticks to **Record the Attendance/Outcome**



6. Select the **Outcome: Attended** and **Add** the **Consumables** linked to this ACC Claim, then click **Submit**

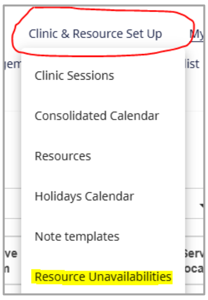


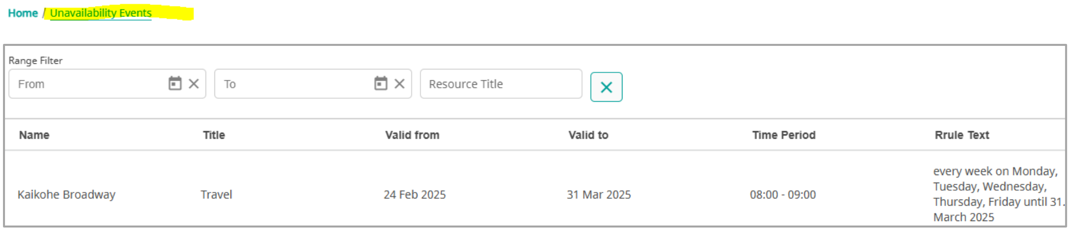
7. When the ACC work is completed, use the **ACC Claims** worklist to find the ACC Claim. Use the pencil to edit, then select **Complete**, click **Next** to complete **Visit Information**, then **Submit**.



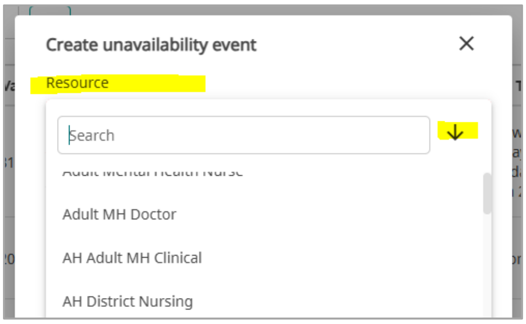
Create Unavailable Events in a calendar

1. From the **Clinic & Resource Set Up** menu, select **Resource Unavailabilities** to display a list of all existing unavailability events.



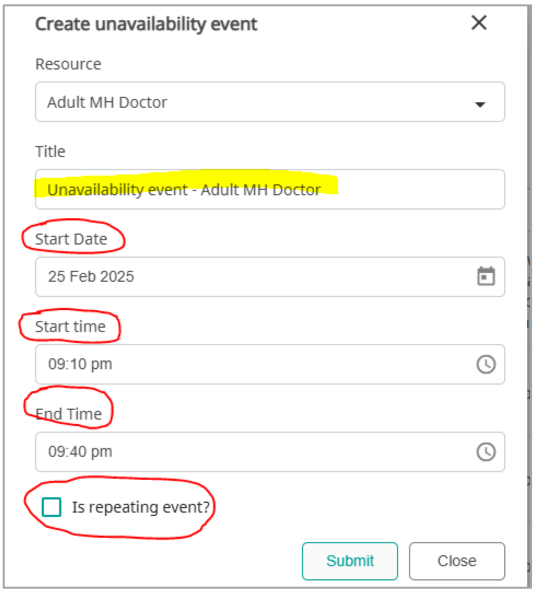


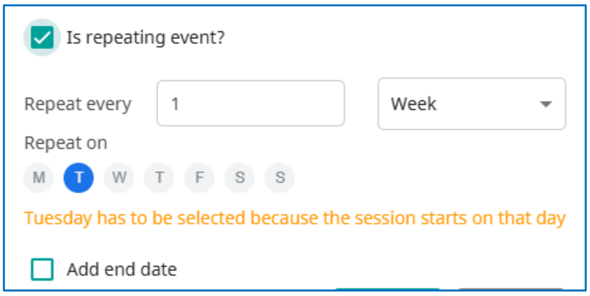
2. To add a new event, click Add (top right), then select the person or resource the event is for.

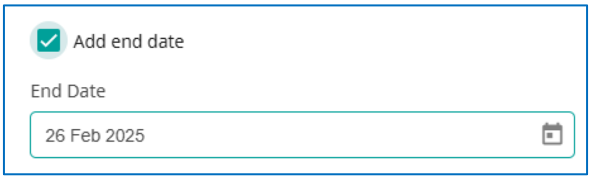


3. Add the start date, time and end time.

4. If needed, set this up as a repeating event. Identify how often the event will occur (daily, weekly, monthly) and add an end date if temporary.







5. Click Submit to save the unavailability event.

6. The event displays in the list – now check the calendar.