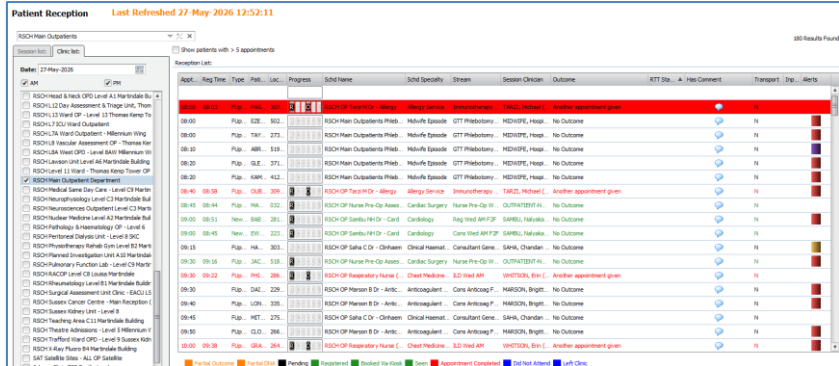


# CAREFLOW PAS - ADD A WALK-IN PATIENT REFERRAL AND APPOINTMENT

**Please note:** To be able to use Walk-in functionality, you must have first set up a suitable **View** in **View Patient Reception**. See the **Set up a Personalised Session List View** guide for further details.

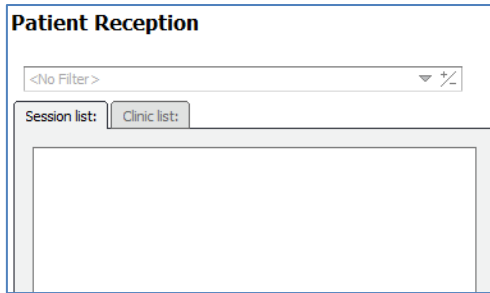
From the Outpatients module of the Navigation bar, select **View Patient Reception**

The following screen displays:



Click on the **Session List** tab

The screen displays a blank Session List, if you haven't set a personal default **View**, in the **Filter** field above the tabs:

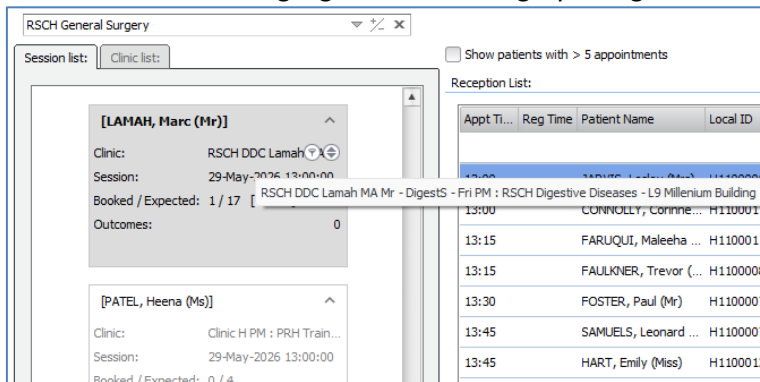


Select your **View** from the **Filter** field, if necessary.

A Clinic (or Schedule) consists of a Session or Sessions. Therefore, you may have more than one session on the day of the clinic e.g. AM or PM session as opposed to an All-Day session.

Click on the required Session your patient will be attending

The selected session highlights with a dark grey background:



**Tip:** Hover over the Clinic name and a tool-tip displays the session name and clinic location. This is the Session your patient will be booked into.

**Note:** **Booked** – walk-ins, **Expected** – prior booked appointments

To walk-in your patient, **right-click** within the Reception List block

The actions menu displays:

Appt Ti...	Reg Time	Patient Name	Local ID	Type	Treatments	Stream	Progr...	Outcome	Transport	Lin
13:00				New		Consultant		No Outcome	N	
13:00				New		Registrar		No Outcome	N	
13:15				FUp		Registrar		No Outcome	N	
13:15				FUp		Consultant		No Outcome	N	
13:30				New		Consultant		No Outcome	N	
13:45				New		Consultant		No Outcome	N	
13:45				New		Registrar		No Outcome	N	
14:00				New		Consultant		No Outcome	N	
14:00				New		Registrar		No Outcome	N	
14:15				New		Consultant		No Outcome	N	
14:15				New		Registrar		No Outcome	N	
14:30	14:00			New Fa...		Consultant		No Outcome	N	
14:45				New		Consultant		No Outcome	N	

Click **Walkin Patient**

The **Referral Details** screen displays, for the selected Session:

RSCH DDC Lamah MA Mr - DigestS - Fri PM - Fri 29-May-2026

Main Clinician: LAIFAL, Marc (PhD)  
Specialist: General Surgery

**Referral Details**

Administrative Details  
 Hospital: [dropdown] Method of referral: [dropdown]  
 Referral type: [dropdown] Referral reason: [dropdown]  
 Letter type: [dropdown] Source of referral: [dropdown]  
 Address category: [dropdown] Overwrite address: [dropdown]  
 Original Consultant: [dropdown] Date Takenover Date: [dropdown]

Referral Information  
 Referred date: [dropdown] Time: [dropdown] Referred to: [dropdown] (DD/YY/YY) with a (DD) unless applicable/hold  
 Referred date: [dropdown] Time: [dropdown] Classification: [dropdown]  
 Referred by: [dropdown] Referral ref: [dropdown] Speciality: [dropdown]  
 Referral Priority: [dropdown] GP open access: [checkbox] Short notice patients: [checkbox] Practice group: [dropdown] Day Policy: [dropdown] Availability: [dropdown]  
 Cross Booking OBS: [dropdown] Team: [dropdown]

Other Details  
 Referred note: [text area] Suspended Cancer: [checkbox] Cancer Referral Type: [dropdown] Referred to Treatment: [dropdown]  
 Referral Status: [dropdown] Pathway type: [dropdown]  
 Review Date: [dropdown] Review Comment: [text area] Review Date: [dropdown] Pathway ID: [dropdown]  
 Selected Schedule: [dropdown] Pathway created: [dropdown]  
 Provider code: [dropdown]  
 Current status / file to branch: [dropdown]  
 Status: [dropdown]  
 Action date: [dropdown] Time: [dropdown]

Unreferred Procedures (DMS) Diagnostic, Service Line (right click in WHIS to add)

Search for your patient

See the **MPI > Search for a Patient** guide for details

The **Patient Details** window displays:

ROBINSON, David (M), 22-Jun-1964, H1000327 - Patient details

Name Details  
 Forename: [input] Other Given Names: [input]  
 Surname: Robinson  
 Title: [dropdown] Name at Birth: [input]  
 Unqualified/Qual Number: [input] Preferred Name: [input] [Add Address]

Personal Details  
 Date of Birth: 22-Jun-1964 [input] Estimated Age: 61  
 Gender: Male  
 Civil status: Married/Civil Part. Patient, or immediate family, has served in the  
 Ethnic group: White British  
 Nationality: British Religion: Church of England  
 Have you been living in the UK for the last 5 years? Yes [input]  
 Date of death: [input] Health status: [input] Verified [input]  
 Consent to share: Displayed Consent Support needed: No Visual Impairment: No

Address Details  
 Current address: [input]  
 Address: [input]  
 Postcode: [input]  
 [Add Address]

GP Details  
 GPs: [input]  
 Practice: [input]  
 [Add Address]

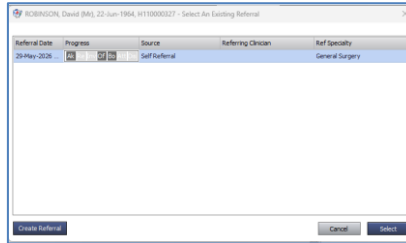
Contact Details  
 Home telephone: Telephone 01273555555  
 Mobile telephone: [input]  
 Next of kin: Vanessa Robinson (Spouse) 01273555555  
 Employment: Unemployed, Teacher

These details **must be checked** and **updated** to ensure the Trust maintains accurate patient records. You learnt this during your MPI training/eLearning before moving on to Outpatients.

Only proceed with **Save** if this is the correct patient, otherwise **Cancel** and try further searches.

Click **Save** – if you have changed details, click **Yes** to save those changes

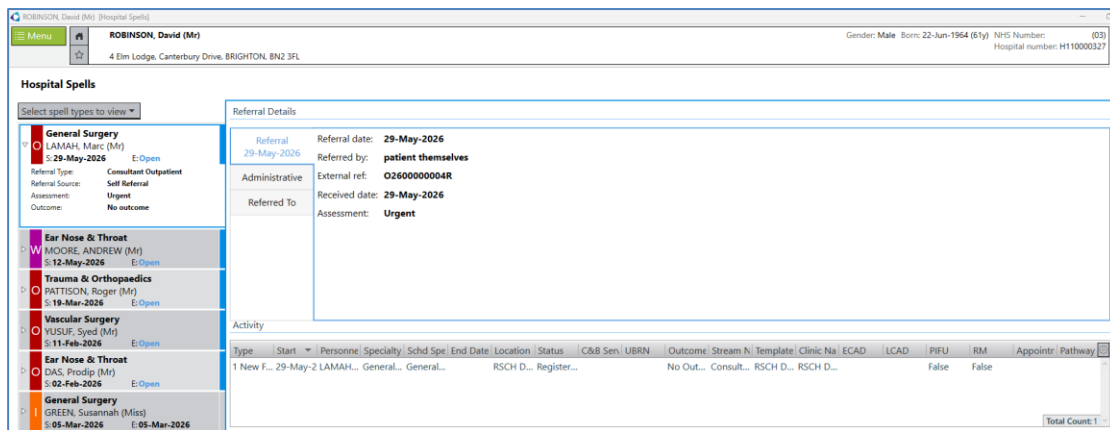
If the patient already has one or more active Referrals matching the Specialty of the Session, this window displays:



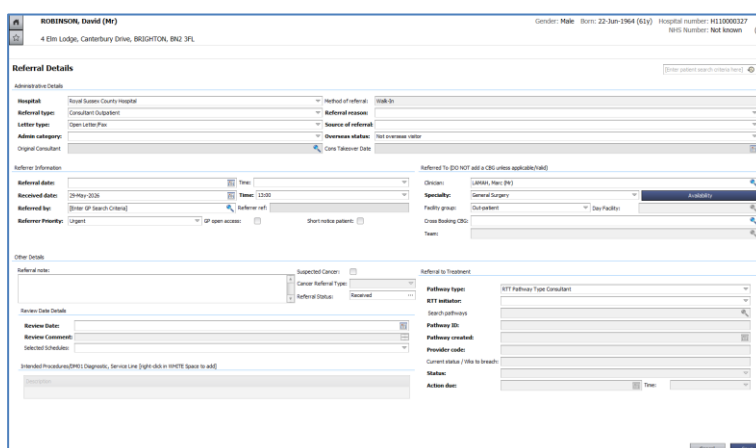
It is difficult to know whether you should link to an existing Referral or create a new One.

Follow departmental policy on what to do next. **Note:** you can select the **Create Referral** button, to proceed to the next screen, defaulting all the Session details into the Referral window.

This then enables you to access the **Patient Homepage**, to then look at existing Outpatient Referrals (via **View All** against **Patient Activity**), without leaving the Referral Details screen:



Once you have checked the relevant Outpatient **Referral Details** tabs and Appointments in the **Activity** block below, close the Homepage to return to CareFlow PAS underneath.



**Please note:** if you are doing this, you must **Cancel** this **Referral Details** screen and start the Walk-in process again

### Selecting the Existing Referral

If you **double-click** the correct existing Referral from the pop-up window...

The **Diary View** displays, to book the appointment against that referral:

**Diary**  
**RSCH DDC Lamah MA Mr - DigestS - Fri PM - Fri 29-May-2026**  
 Clinic Area: RSCH Digestive Diseases - L9 Millenium Building Main Clinician: LAMAH, Marc (Mr)  
 Comments: Specialty: General Surgery

Time	Consultant	Registrar
13:00	4 New/Routine Patient: JARVIS, Lesley (Mrs) - Hospital number : H110000602 - [1/1]	4 New/Routine Patient: CONNOLLY, Corinne (Mrs) - Hospital number : H110001115 - [1/1]
13:05		
13:10		
13:15	4 FlUp/Routine Patient: FALUJNER, Trevor (Mr) - Hospital number : H110000887 - [1/1]	4 FlUp/Routine Patient: FARUQI, Maleha (Mrs) - Hospital number : H110001181 - [1/1]
13:20		
13:25		
13:30	4 New/Routine Patient: FOSTER, Paul (Mr) - Hospital number : H110000773 - [1/1]	Universal/Routine - [0/1]
13:35		
13:40		
13:45	4 New/Routine Patient: SAMUELS, Leonard (Mr) - Hospital number : H110000791 - [1/1]	4 New/Routine Patient: HART, Emily (Miss) - Hospital number : H110001211 - [1/1]
13:50		
13:55		
14:00	4 New/Routine Patient: ENGLISH, Duncan (Mr) - Hospital number : H110000805 - [1/1]	4 New/Routine Patient: HAMILTON, Julian (Mr) - Hospital number : H110001216 - [1/1]
14:05		
14:10		
14:15	4 New/Routine Patient: MACAVOY, Denise (Mrs) - Hospital number : H110000820 - [1/1]	4 New/Routine Patient: BRIGGS, Darren (Mr) - Hospital number : H110001242 - [1/1]
14:20		
14:25		
14:30	1 New FaceToFace/Urgent Patient: ROBINSON, David Paul (Mr) - Hospital number : H110000327 - [1/1]	FLUP/Routine - [0/1]
14:35		
14:40		

Slot Totals 'Booked' / Maximum (Overbooked/Forcebooked)

Type	Routine	Two Week Wait	Urgent	Total
New	14/24 (0)	0/0 (0)	1/1 (0)	15/25 (0)
Flup	2/11 (0)	0/0 (0)	0/0 (0)	2/11 (0)
Overbooking/Force Booking				0/0 (0)
				17/36

4 universal slots have been allocated to the new & follow-up totals.

Skip to the **Booking a Walk-in Appointment** sections below.

### Selecting Create Referral

If you click the **Create Referral** button...

Session details pre-populate the **Referral Details** window:

**ROBINSON, David (Mr)**  
 4 Elm Lodge, Canterbury Drive, BRIGHTON, BN2 3FL  
 Gender: Male Born: 22-Jun-1964 (61y) Hospital number: H110000327  
 NHS Number: Not known (03)

**Referral Details**

Administrative Details  
 Hospital: Royal Sussex County Hospital Method of referral: Walk-in  
 Referral type: Consultant Outpatient Referral reason:  
 Letter type: Open Letter/Fax Source of referral:  
 Admit category: Open Letter/Fax Overseen status: Not overseen visitor  
 Original Consultant: Core Referral Date: Referred To (DO NOT add a CBS unless applicable/ask)

Referral Information  
 Referral date: 29 May 2026 Time: 12:00 Clinician: LAMAH, Marc (Mr)  
 Received date: 29 May 2026 Time: 12:00 Specialty: General Surgery  
 Referred by: Enter ID Search Clinical Referral via: Health group: Out patient  
 Referral priority: Urgent IP open access: Overseen patient: Core Booking (CBS): Team:

Other Details

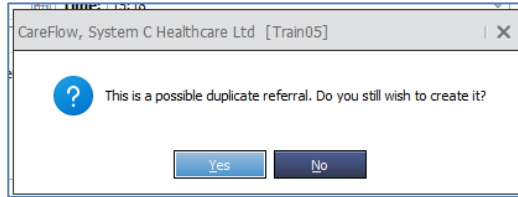
Complete the appropriate fields

**Please note:** Follow departmental policies regarding what values go into the Referral's fields for this walk-in. Values may well change per patient.

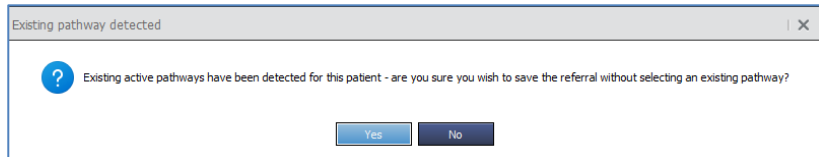
At the end of this data entry, ensure you have selected the appropriate RTT initiator.

Click the **Save** button

Three possible pop-ups may display:



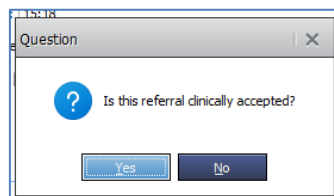
If you selected **Create Referral** from the window that showed an existing referral in the same specialty



Where an existing RTT Pathway exists for this patient but you chose **non-RTT** for your **RTT Initiator** selection.

In both the above examples, follow departmental processes as to whether you select **Yes** to proceed.

The third pop-up only appears if you didn't already change the **Referral Status** from **Received** to **Accepted**, using the relevant **Ellipses (...)**



Click **Yes** if you get this message because otherwise you can't book the Walk-in appointment.

The **Diary View** displays:

The screenshot shows the 'Diary View' for 'RSCH DDC Lamah MA Mr - DigestS - Fri PM - Fri 29-May-2026'. The main area is a grid of appointments for Consultant and Registrar. The Consultant column lists appointments for Jarvis, Lesley; Fallmer, Trevor; Foster, Paul; Samuel, Leonard; English, Duncan; MacAvoy, Denise; and Robinson, David Paul. The Registrar column lists appointments for Connolly, Corinne; Faruqi, Maleeha; Hart, Emily; Hamilton, Julian; and Briggs, Darren. A calendar view for May 2026 is shown on the right, with the 29th highlighted. A legend indicates appointment statuses: Booked (red), Available (green), Unavailable (blue), Partial Booked (orange), Potentially (yellow), and Pending Cancelled (grey). A summary table at the bottom shows Slot Totals for Type, Routine, Two Week Wait, Urgent, and Total.

Type	Routine	Two Week Wait	Urgent	Total
New	14/24 (0)	0/0 (0)	1/1 (0)	15/25 (0)
Flp	2/11 (0)	0/0 (0)	0/0 (0)	2/11 (0)
Overbooking/Force Booking			0/0 (0)	0/0 (0)
				17/36

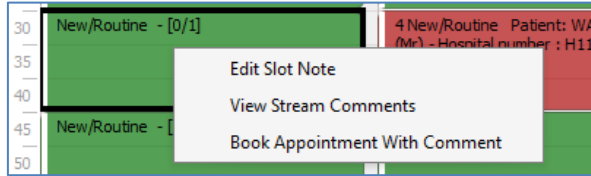
4 universal slots have been allocated to the new & follow-up totals.

**Booking a Walk-in Appointment – Available Slots**

If the clinic doesn't have any available slots and you have to force them into a full clinic, skip to the section below, called **Booking a Walk-in Appointment – Already Full Session, No Available Slots**.

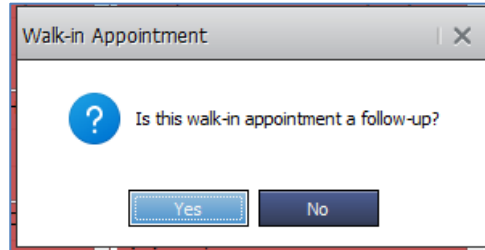
**Right-click** on an available slot

The action menu displays:



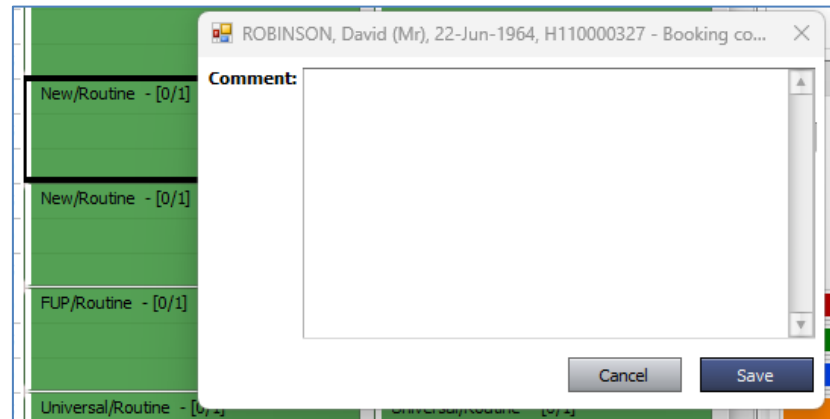
Click **Book Appointment with Comment**

The following pop-up displays:



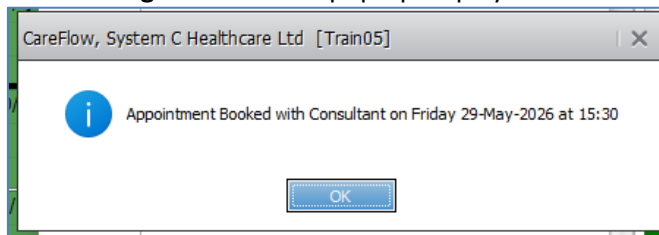
Click **Yes** for a **Follow Up, Face-to-Face**

Click **No** for a **New, Face-to-Face**



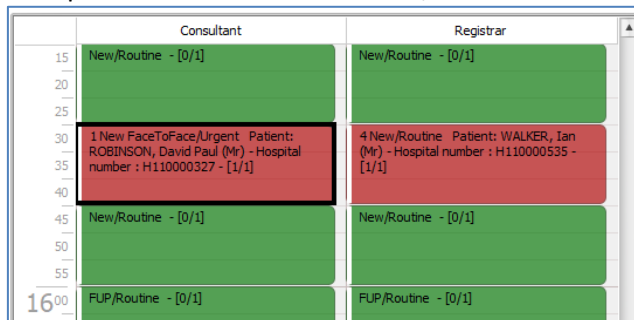
Type in the relevant comments, as usual then click **Save**

The **Booking Confirmation** pop-up displays:



Click **OK**

Your patient has now been booked, as a Walk-in:



Click the **Close** button, to close the **Diary View**

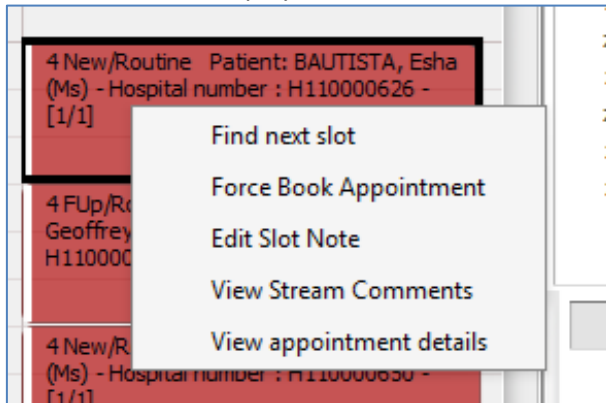
Your walk-in patient displays in the Reception List as booked and arrived:

15:00	PICKETT, Mark (Mr)	H110001275	4 New	
15:30	WALKER, Ian (Mr)	H110000535	4 New	
15:30	15:32	ROBINSON, David ...	H110000327	1 New Fa...
16:45	BIRD, Shane (Mr)	H110000744	4 New	

**Booking a Walk-in Appointment – Already Full Session, No Available Slots**

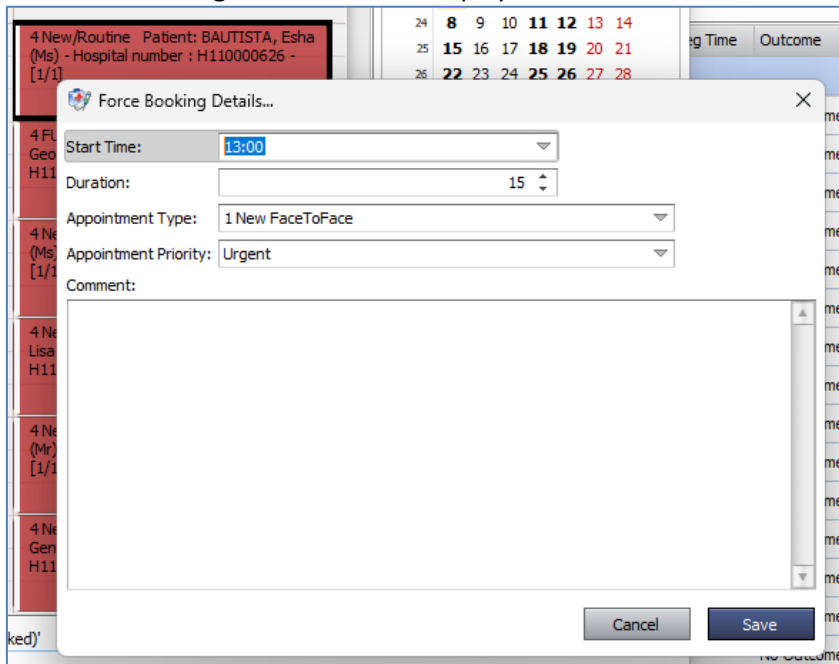
**Right-click** on an already booked slot, around the time you want the patient to be seen

The action menu displays:



Click on the **Force Book Appointment** option

The **Force Booking Details** window displays:

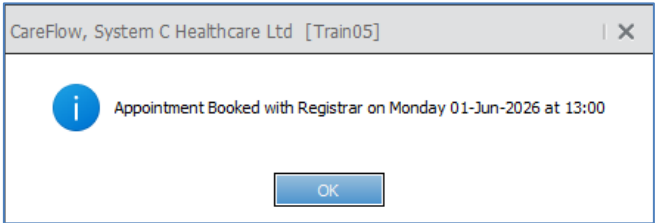


The appointment's **Start Time** and **Type** will always be taken from the one you right-clicked on but all of these fields can be changed to the details you require for this appointment.

Amend, if required. The **Comment** text box is the appointment comment box so it is very important to complete this, as usual, including the name of the person who authorised this.

Click **Save**

The Booking Confirmation pop-up displays:



Click **OK**

As expected, a new Stream displays in the Diary View:

Registrar	Force Booking (Registrar)
4 New/Routine Patient: BAUTISTA, Esha (Ms) - Hospital number : H110000626 - [1/1]	1 New FaceToFace/Urgent Patient: ROBINSON, David Paul (Mr) - Hospital number : H110000327 -
4 FUp/Routine Patient: HESTER, Geoffrey (Mr) - Hospital number : H110000607 - [1/1]	
4 New/Routine Patient: WEBBER, Tawlah (Ms) -	

Your patient has now been booked, as a force-booked Walk-in.

Click the **Close** button, to close the **Diary View**

Your walk-in patient displays in the Reception List as booked and arrived:

13:00	4 New	BENSON, Milana (M...	H110001056
13:00	4 New	BAUTISTA, Esha (...	H110000626
13:00	11:24	1 New Fa... ROBINSON, David ...	H110000327
13:15	4 FUp	HESTER, Geoffrey ...	H110000607
13:15	4 FUp	KALFEMAN, Zee (Mr)	H110001073