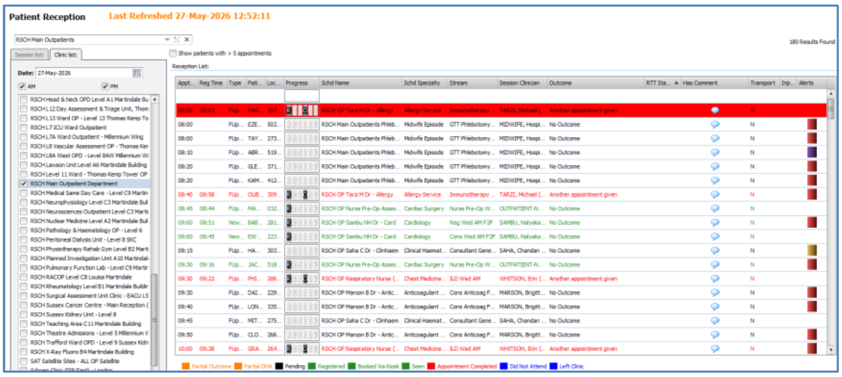
CAREFLOW PAS – SET UP A PERSONALISED SESSION LIST VIEW

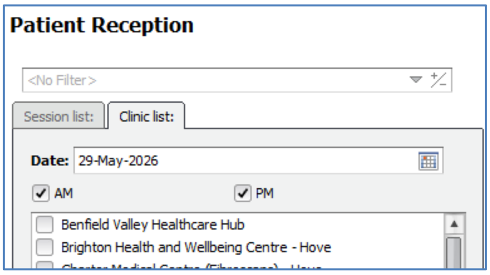
View Patient Reception lists Clinics, on a specified date, for appointments within a selected clinic location (**Clinic List** tab).

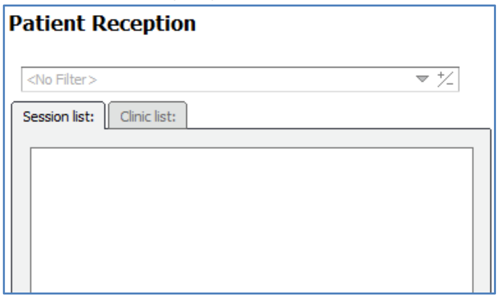
A personalised Clinic list (**Session List** tab) can also be set up, with one benefit being that it is the only way for patients to be attended as a Walk-in. i.e. without booking an appointment in advance.

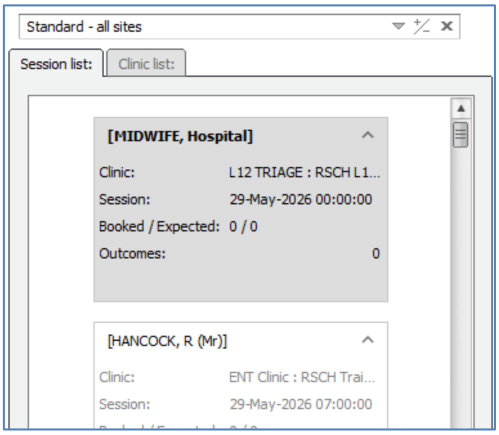
A shorter version, of this guide's steps exists, in the **View Patient Reception** guide.

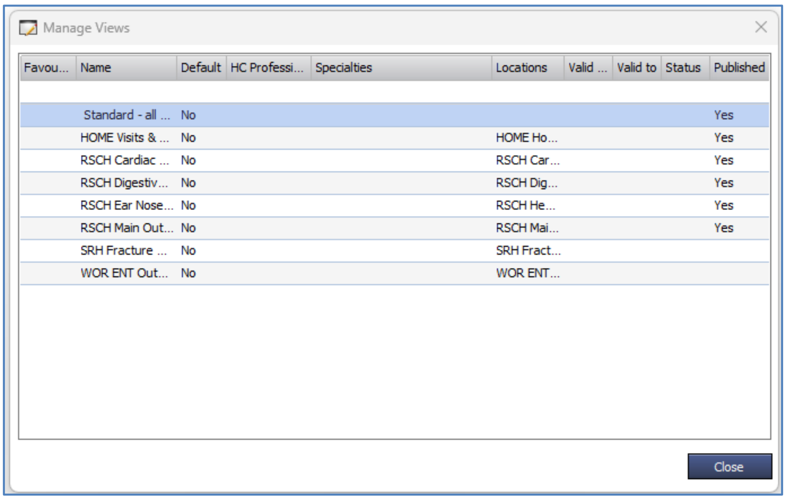
To book Walk-ins, please see the **Add a Walk-in Patient Referral and Appointment** guide for further details.

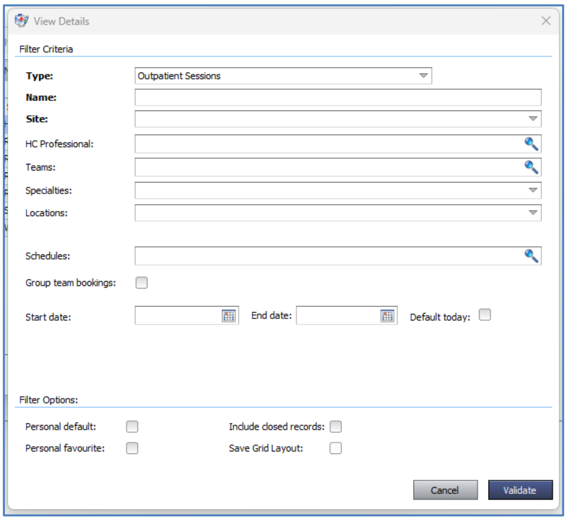
<table>
<tr>
<td>From the Outpatients module of the Navigation bar, select View Patient Reception</td>
<td>The following screen displays:


This screen defaults to the Clinic List tab – this displays the clinic locations for the hospital site PAS has set for the PC.


The Filter field usually defaults to <No Filter>.</td>
</tr>
<tr>
<td>Click on the Session List tab</td>
<td>The screen displays a blank Session List:

</td>
</tr>
</table>

<table>
<tr>
<td>Click into the Filter field then select Standard – All Sites</td>
<td>The Session List now displays all the clinics for today:


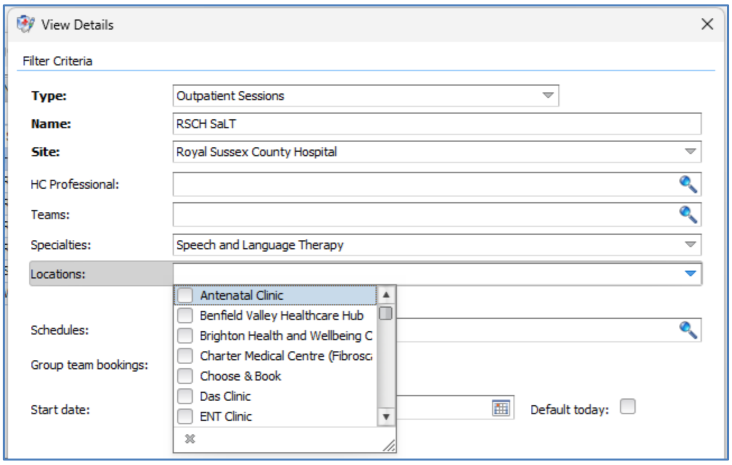
However, this was set by the PAS team and now you understand that the Filter field displays a set of clinics you can configure, continue through this guide on setting your own up.</td>
</tr>
<tr>
<td>Click the +/- icon at the end of the Filter field</td>
<td>The Manage Views window displays:


You can only ever edit and delete filters you have added.</td>
</tr>
<tr>
<td>Right-click then Add</td>
<td>The View Details window displays:

</td>
</tr>
</table>

The **View Details** window is where you will now set the criteria for which clinics you want appearing within your selected (and therefore filtered) View.

Complete the necessary fields to build your filter:

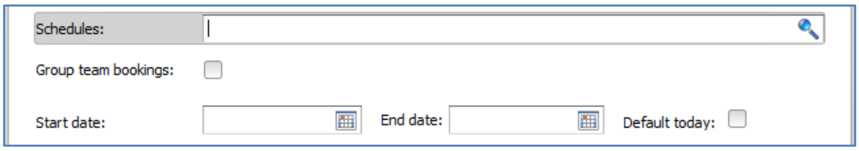
Here is an example of some criteria for SaLT at the RSCH:



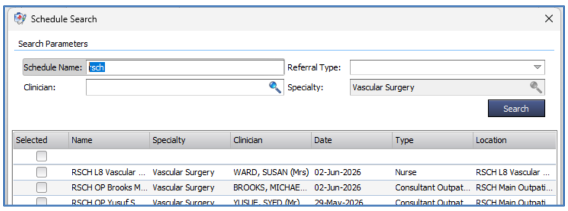
You can see above that **Name** and **Site** are mandatory, as they are bold.

Criteria	Description
Name	The name you see when selecting the Filter for Reception View
Site	Hospital site – set to one or more. Leave blank if you want all sites' clinics
HC Professional	Clinician-in-Charge – set to one or more. Leave blank for all clinicians
Teams	Not in use at UHSussex. Ignore
Specialties	Set to one or more. Leave blank for all of them
Locations	Clinic List locations (physical) – more than one can be selected. Leave blank for all locations

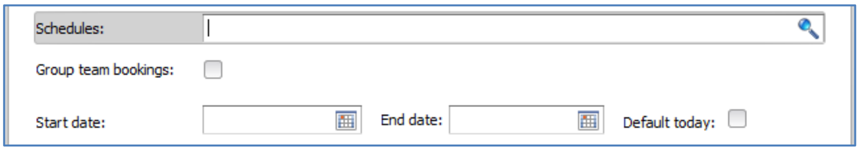
The **Name** field is the only free text field. In the example above, all SaLT specialty clinics will be displayed that occur at RSCH, irrespective of clinician-in-charge or location there.



The **Schedules Search** function will only return clinics/schedules, based on the Clinician-in-Charge and/or Specialty filters already set above that field. Locations do not affect this search.



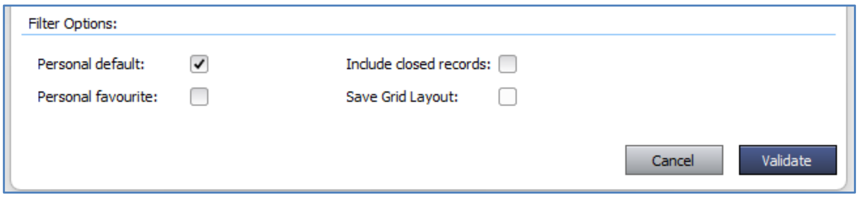
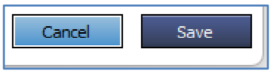
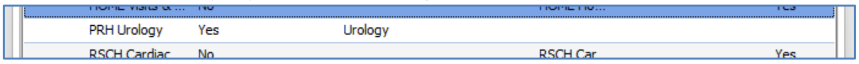
Here we can see a specialty of Vascular Surgery and then searching for all clinics starting RSCH has found me all the RSCH Vascular clinics. The results would differ if you had already selected named clinician-in-charge(s) or both values.



Group Team Bookings are not in use at UHSussex. Ignore.

Start and **End Date**s are finite, so only use this if you regularly come back to these settings to keep changing those date ranges.

Otherwise, use **Default Today**, so the **Session List** tab always updates to today's clinics when you open **View Patient Reception**.

Click on the **Personal Default** tickbox, if you want this to be selected when you open **View Patient Reception**	 **Personal Favourite** just puts a star against the View in **Manage Views**. Don't include Closed Records or Save Grid Layout.
Click the **Validate** button, which checks too many results won't be returned	If your selection was acceptable, the button changes to **Save**: 
Click the **Save** button	The new View displays in the Manage View window:  In the example above the Yes, next to **PRH Urology**, indicates it is my default and therefore will already be selected when I open **View Patient Reception**. If ever you need to edit this, **right-click** your personalised Session List View > **Edit**.
Click the **Close** button	The window closes, returning to **View Patient Reception** underneath.

Only when you leave the screen, and return, will your default filter **View** pre-populate.

Remember to click the **Sessions List** tab when re-entering **View Patient Reception**.

If you do not set your View as a Personal Default, you will need to manually select the View you want, from the Filter field, each time.

You will also want to tailor the columns within Reception view. See the **View Patient Reception** guide.

Please note: If you have followed this guide in readiness to learn how to create Walk-ins, please now see the **Add a Walk-in Patient Referral and Appointment** guide for further details.