

Log an Appointment

kinseed

Learn how to log an appointment within MediWork



Important!

The Appointments function in MediWork allows you to log appointments against episodes and records, so you can keep a record of when you interacted with people under Occupational Health Management. **Appointments in MediWork do not currently send invites or get added to calendars - they are for record keeping purposes only.**



The upcoming 2.0 release of MediWork will include a full calendar and invite functionality for Appointments - Kinseed will communicate with you and your team when this feature is ready.

1

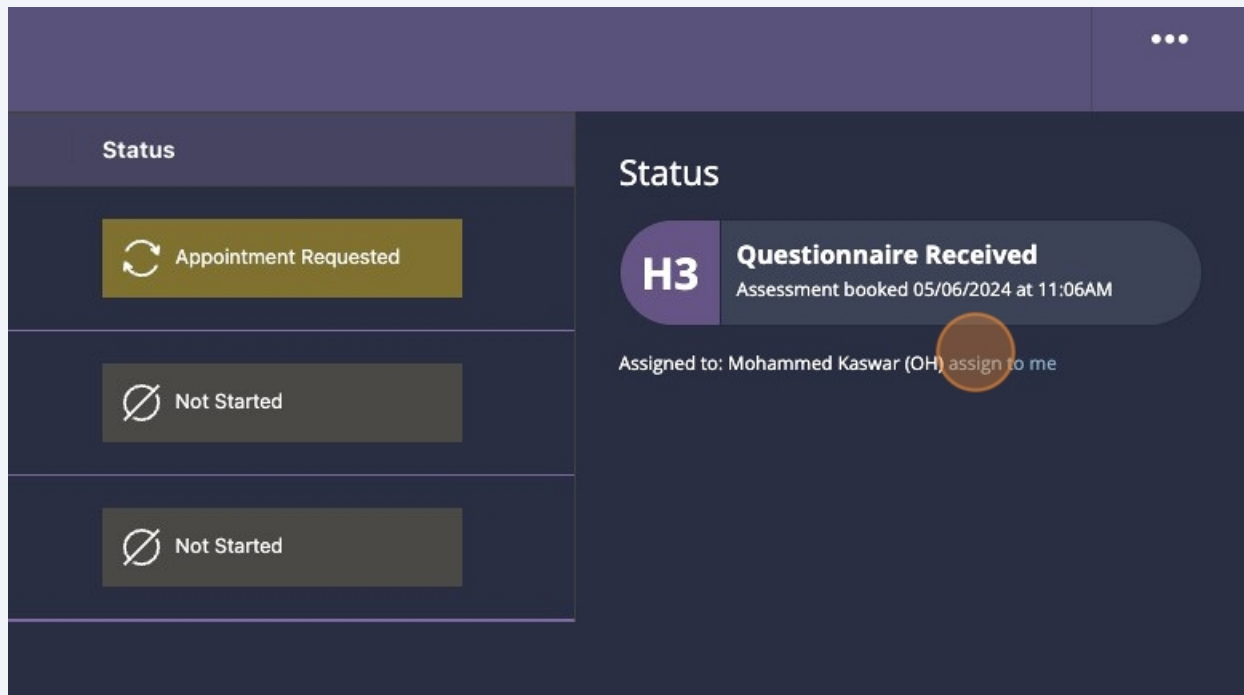
Open an episode for any person where you need to log or manage appointments

The screenshot displays the 'People Manager' interface in MediWork. At the top, there's a header bar with 'People Manager' and user information 'Josh Knight'. Below this, a table lists appointments for 'James Smith' under 'Health Surveillance'. The table has columns for 'Person', 'Area', and 'Status'. The appointments listed are:

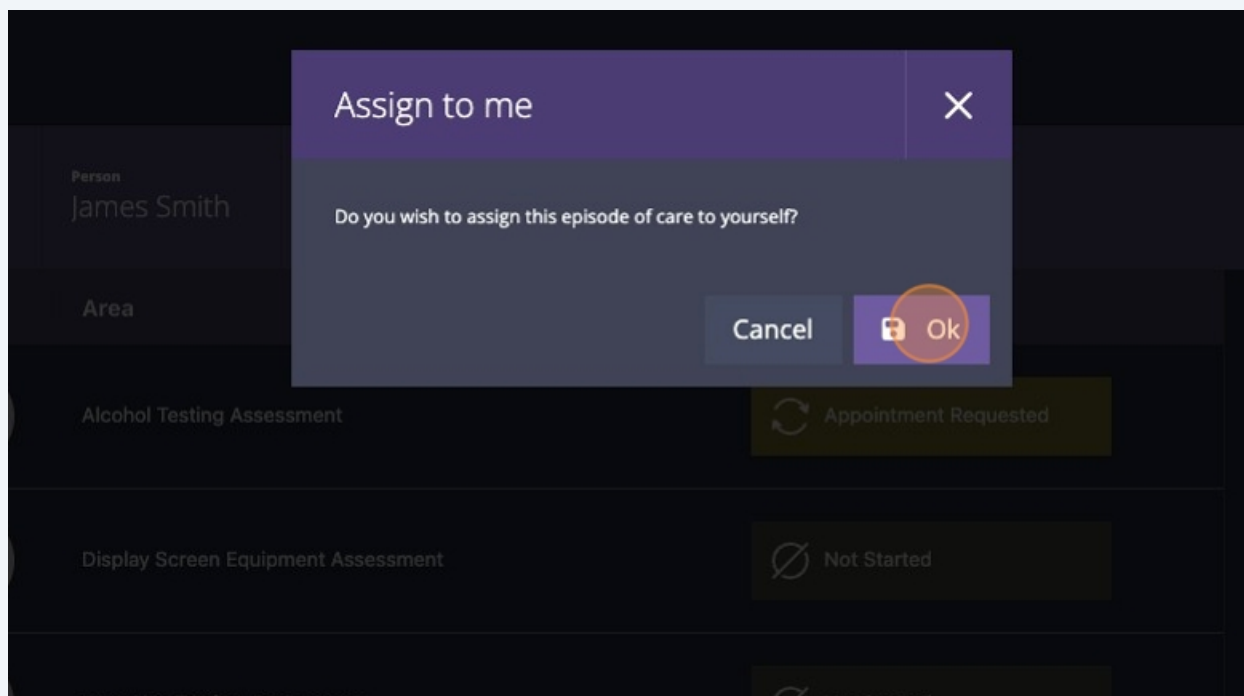
Person	Area	Status
James Smith	Alcohol Testing Assessment	Appointment Requested
	Display Screen Equipment Assessment	Not Started
	Drug Use Testing Assessment	Not Started

On the right side of the interface, there's a 'Status' section showing 'H3 Questionnaire Received' with the note 'Assessment booked 05/06/2024 at 11:06AM' and 'Assigned to: Mohammed Kaswar (OH) assign to me'. A sidebar on the left contains navigation links: Person, Organisation, Episodes, Journal, Documents, Communications, Absence Reviews, and Notes.

- 2 If the episode is not currently assigned to you, click **Assign to me**



- 3 Click "Ok"

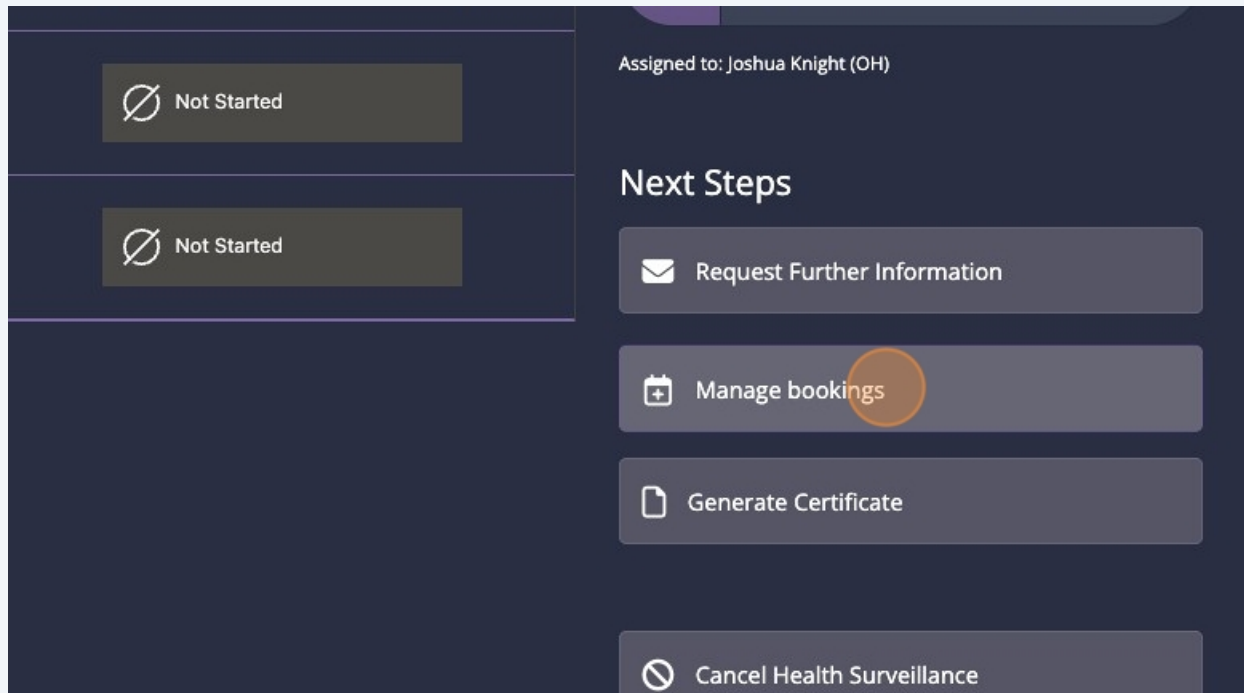




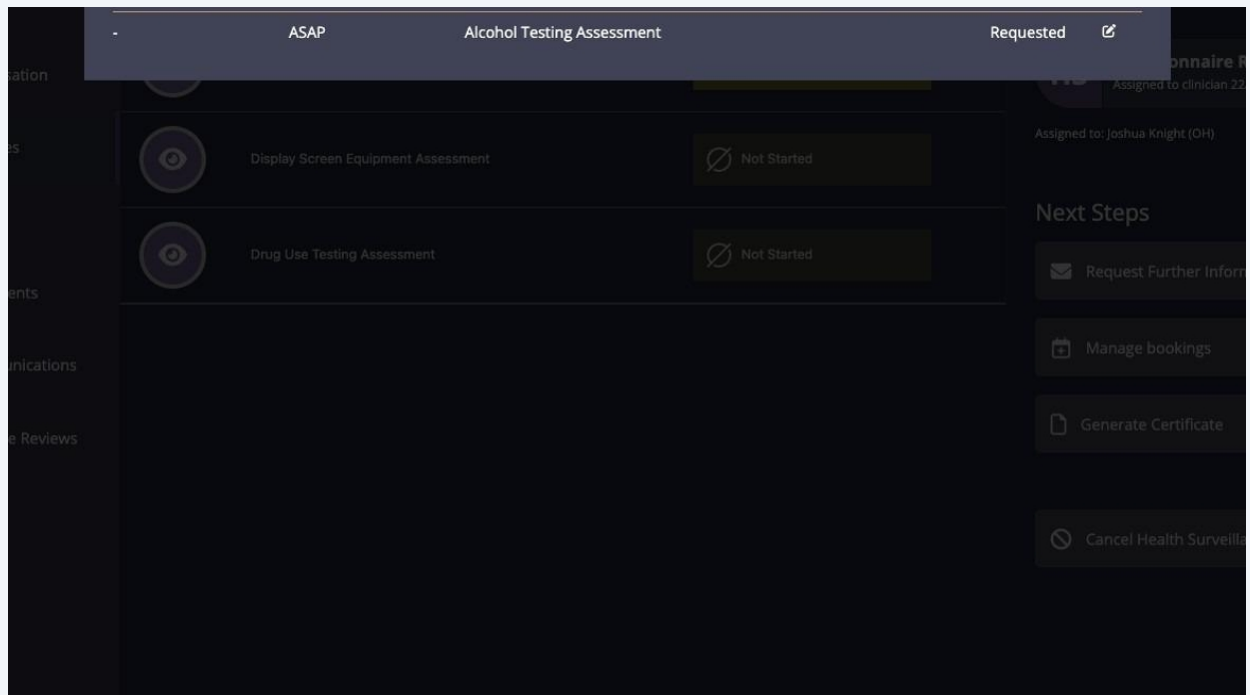
Assigning an episode to yourself marks you as the last person to take action on the episode, and allows you to make changes / progress the episode with the Next Steps button

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Click "Manage bookings"

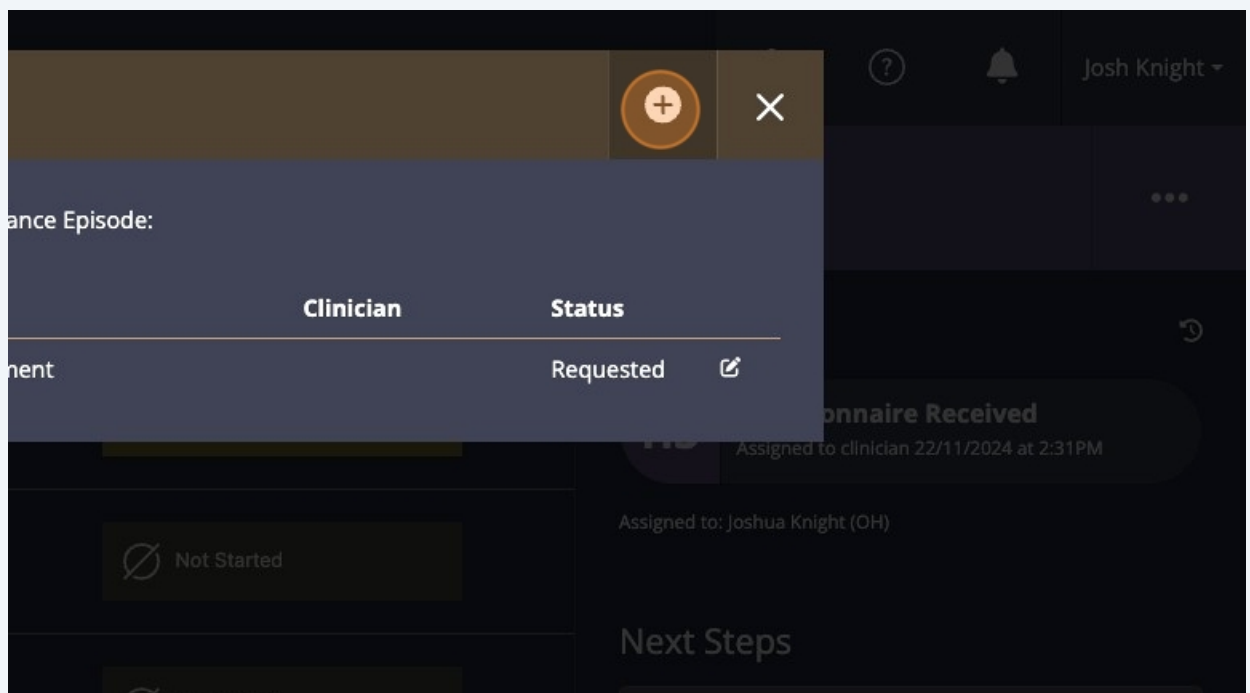


- 5 You will see a list of bookings already logged against this episode



Adding a new Appointment

- 6 To add a new appointment, click the **Add appointment** button

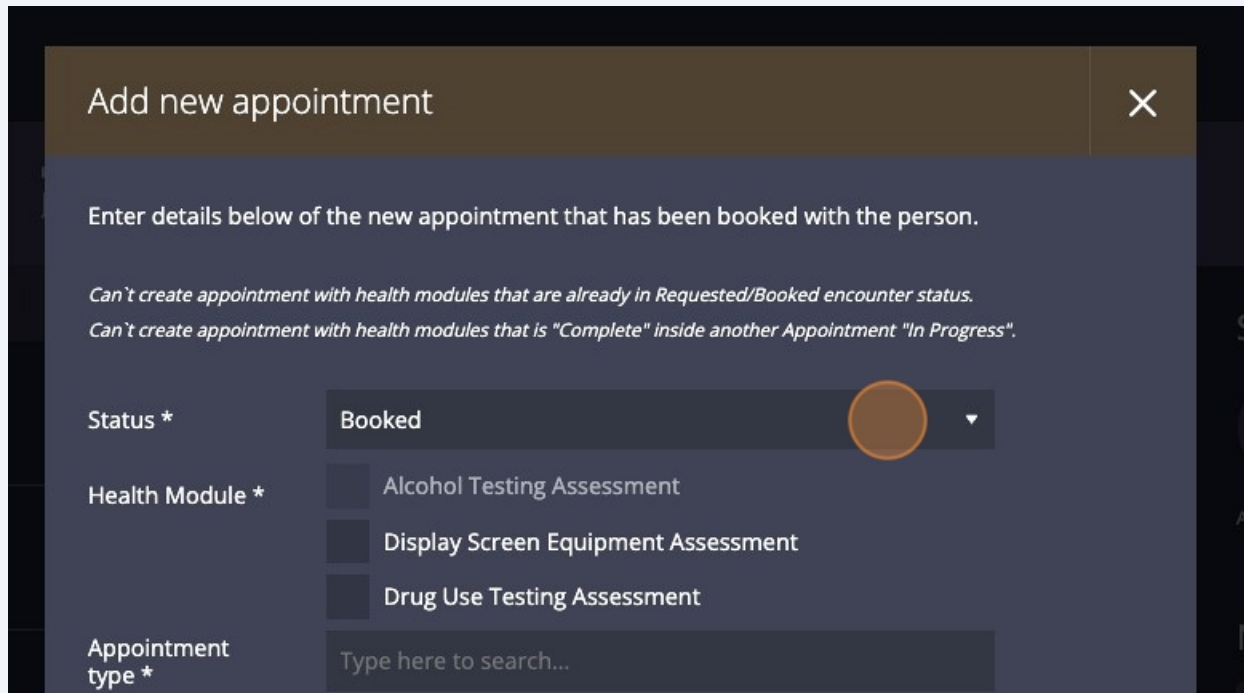


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Select the type of appointment:

Requested appointments have not yet been booked, and are ready for a team member to make the booking.

Booked appointments have been booked in the diary, and are ready to take place.



The screenshot shows a web form titled "Add new appointment" with a close button (X) in the top right corner. Below the title, there is a text prompt: "Enter details below of the new appointment that has been booked with the person." Two lines of error messages are displayed in a smaller font: "Can't create appointment with health modules that are already in Requested/Booked encounter status." and "Can't create appointment with health modules that is 'Complete' inside another Appointment 'In Progress'." The form contains three main fields: "Status *" with a dropdown menu currently showing "Booked" and a blue circular highlight; "Health Module *" with a list of three options: "Alcohol Testing Assessment", "Display Screen Equipment Assessment", and "Drug Use Testing Assessment"; and "Appointment type *" with a text input field containing the placeholder "Type here to search..."

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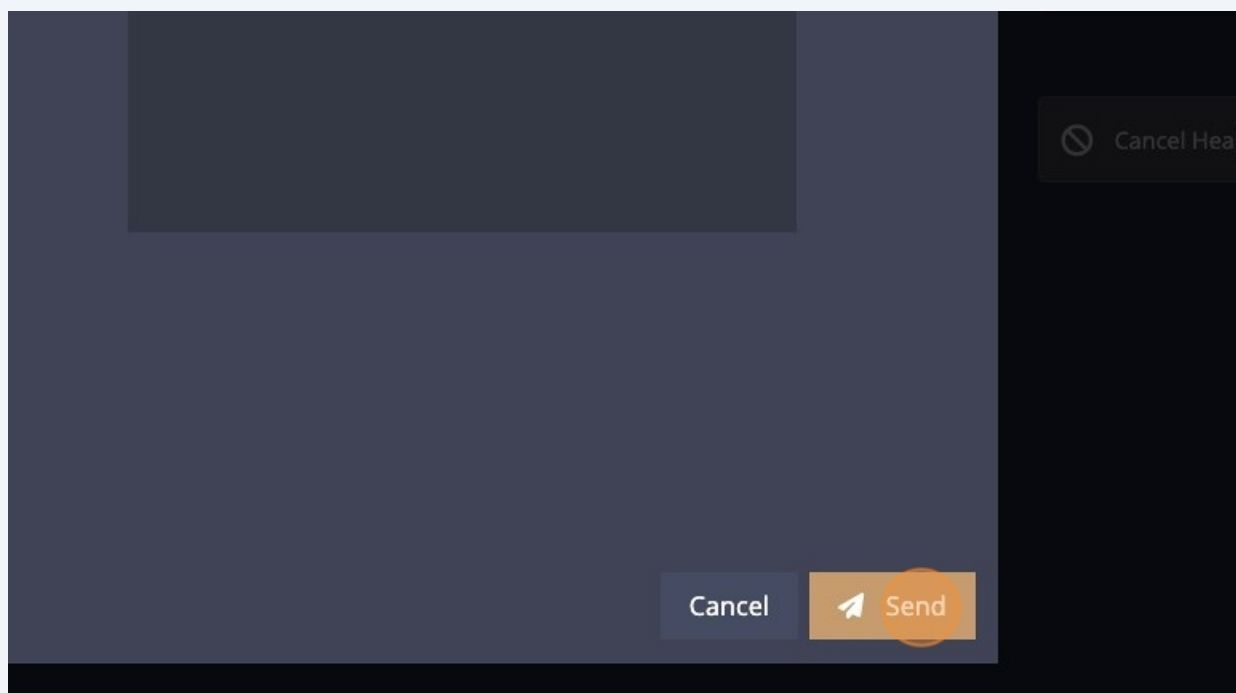
Fill in the rest of the details of the appointment. Depending on the type of episode (Pre-placement, Health Surveillance, Case, Immunisation), you may need to select other information - like which Health Module or Immunisation this appointment is relating to.



A screenshot of a dark-themed appointment form. At the top, there are two checkboxes: 'Display Screen Equipment Assessment' (checked) and 'Drug Use Testing Assessment' (unchecked). Below these are five input fields: 'Appointment type *' with the value 'Face To Face' and a search icon; 'Appointment with' with the value 'Occupational Health Technician' and a dropdown arrow; 'Appointment date/time *' with the value '29/11/2024, 14:31' and a calendar icon; 'Assessor / Clinician Name' with the value 'Bob Robertson'; and 'Notes' which is an empty text area.

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When ready, click "Send"



A screenshot of the bottom portion of the appointment form. It shows a large, empty text area for notes. At the bottom right, there are two buttons: a grey 'Cancel' button and an orange 'Send' button with a white paper plane icon. In the top right corner, there is a partially visible button with a grey circle and slash icon and the text 'Cancel Health'.

10

The appointment is now added to the list. **Remember - this does not send an invitation to the person: you need to book and manage the appointment in a separate tool, like Outlook, to physically arrange the invitation.**

Updating an existing appointment

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Click the edit button next to an existing appointment

The screenshot shows a 'Manage Bookings' window. At the top, it says 'The following bookings have been made in relation to this Health Surveillance Episode:'. Below this is a table with the following data:

Date / Time	Timeframe	Modules	Clinician	Status
29/11/2024, 14:31	-	Display Screen Equipment Assessment	Bob Robertson	Booked
-	ASAP	Alcohol Testing Assessment		Requested

Below the table, there are two rows of appointment details. The first row shows 'Display Screen Equipment Assessment' with a status of 'Appointment Booked'. The second row shows 'Drug Use Testing Assessment' with a status of 'Not Started'. To the right of these rows is a 'Next Steps' panel with buttons for 'Request' and 'Manage'.

- 12 Make whichever changes you need to make to the appointment, and click "Save"

Drug Use Testing Assessment

Appointment type * Admin Rate

Appointment with Occupational Health Technician

Timeframe * ASAP

Notes test

Cancel Save

- 13 Your appointments are now updated, and where appropriate, Episodes will reflect their new status

	Area	Status
Person	Alcohol Testing Assessment	Appointment Requested
Organisation	Display Screen Equipment Assessment	Appointment Booked
Episodes	Drug Use Testing Assessment	Not Started

Status

H3 Questionnaire Received
Assessment booked 22/11/2024 at 2:32PM

Assigned to: Joshua Knight (OH)

Next Steps

- Request Further Information
- Manage bookings
- Generate Certificate
- Cancel Health Surveillance