

All screenshots within this document contains synthetic, notional data only. It is fictional data which does not relate to real people. The screenshot has been added to aid understanding of the Product.

# Transport Cancellation App\_v2

## Quick Reference Guide

### Purpose of the app and general guidance

- Context:

There is no easy way in Cerner to systematically know whether a patient have a transport booked for there OP appointment. So when an appointment is cancelled or rescheduled, team member don't necessarily know that transport also need to be rescheduled or cancelled, resulting in extra cost for the trust and risk for the patient.

- Purpose

The Transport Cancellation app's **objective is to surface Transport bookings that** are currently active in the system but that **may not be required**. For example if an appointment has been cancelled or if the patient is already in the hospital. But also to make sure we reschedule transport booking for patient who have their appointment rescheduled.

- Basics of the app:

The workflow uses a **step-by step approach** where colleagues needs to clear the lists of items in each of the steps by taking an action to cancel/reschedule or dismiss the suggested action. The list needs to be checked a couple of times a day and be cleared before 2.30pm everyday as the cancellation requests are shared with HATS at that time.

# Getting to the Transport App

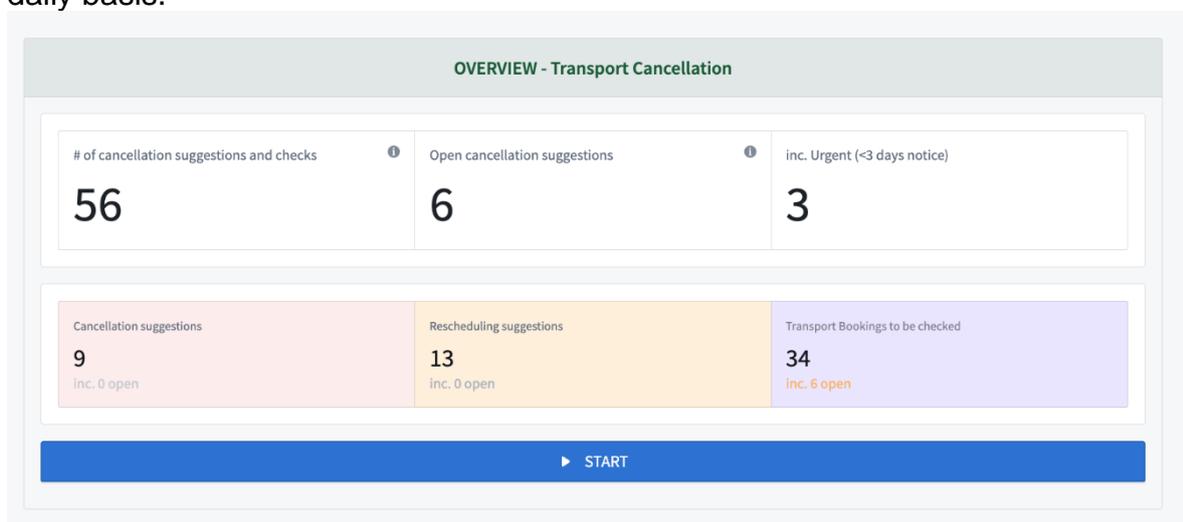
Step	Description	Illustration
1	Log in to CCS Homepage	
2	Click on the Outpatient Module tile to open the OP module	
3	Scroll down the page and Select the Transport Cancellation App in the Useful links section	

4

Start using the  
app

## 1 - Understanding Overview page

This page give you an overview of the outstanding tasks you need to manage on a daily basis.

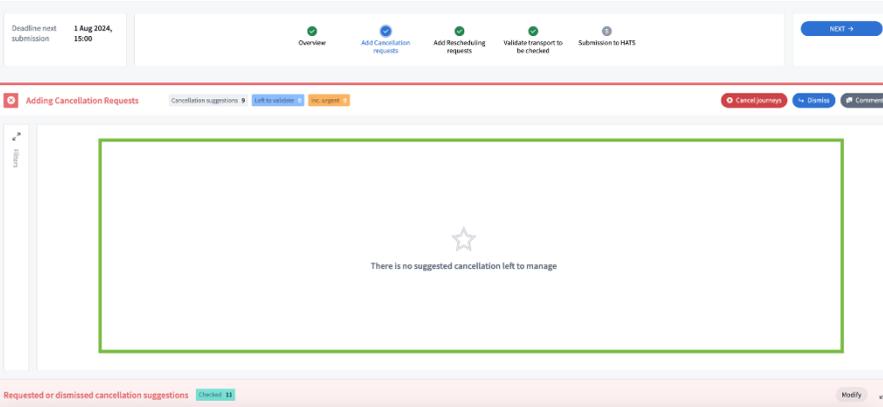


In the above example we have:

- 56 transport booking over the next 15 days that required and action including 3 for appointments within the next 3 days.
- Only 6 of them needs to be managed (the rest has been managed already).
- There is no open cancellation suggestion or rescheduling suggestion to deal with (they have all been taken care of already).
- There 6 open items that requires a staff member to check them.

Once ready to start, **click on** the "**START**" button to move to the next step.

## 2 - Adding a cancellation request to the log

Step	Description	Illustration
1	<p>See the <b>list of suggested transport cancellations</b> for the day</p> <p>NB: If there is no action left to manage the list will be empty and you can move to the next step.</p> <p>(for an understanding of the suggested action please click on 'Suggestion action' in the Settings menu)</p>	 <p>The screenshot displays a web interface for managing cancellation requests. At the top, a progress bar shows five steps: 'Overview' (completed), 'Add Cancellation requests' (current step), 'Add Rescheduling requests' (completed), 'Validate transport to be checked' (completed), and 'Submission to HATS' (pending). Below the progress bar, the main content area is titled 'Adding Cancellation Requests' and contains a message: 'There is no suggested cancellation left to manage' with a star icon. The interface also includes a 'Cancel journey' button and a 'Notify' button at the bottom right.</p>

2

For each item in the list:

Check patient details by clicking on a line in the table – this will open a pop-up

Navigate between section to find additional information about the patient or the appointment

Selection details

**Suggested Action**  
Cancel both journeys

Reason for cancellation: Appointment rescheduled in the past  
Cancellation Request Status: No Request

Appointment Type Urol Flexi Cystoscopy Diag	Appointment Booking Status Rescheduled	Appointment date & Time 17 Jul 2024, 14:30	PLV status -	Inpatient Flag -
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Transport Patient Appointment PLV answers [WIP] Inpatient

**NEXT UPCOMING TRANSPORT STATUS** [Cancel Both journeys](#) [Reschedule both journeys](#) [Comment](#)

**INBOUND** [Cancel Inbound](#) [Reschedule Inbound](#)

Status: Active

Journey ID: 2819568

Pick-up time: 17/07/2024 07:30:00

Pick-up address: [Redacted]

Drop-off address: West Middlesex University Hospital, Twickenham Road

**OUTBOUND** [Cancel Outbound](#) [Reschedule Outbound](#)

Status: Active

Journey ID: 2819569

Pick-up time: 17/07/2024 13:30:00

Pick-up address: West Middlesex University Hospital, Twickenham Road, TW7 6AF, ISLEWORTH

Drop-off address: [Redacted]

Patient historic transport journeys

Transport **Patient** Appointment PLV answers [WIP] Inpatient

		<p>Overview Diagnosis History Test Results</p> <p><b>Outpatient Appointments</b></p> <p>Start Date Time - 17 Jul 2024, 14:30  Specialty Name - Urology  Type - Urol Flexi Cystoscopy Diag  Booking Status - Rescheduled  Referral ID - 63476316</p> <hr/> <p> <b>Urol Flexi Cystoscopy Diag</b></p> <p>Start Date Time - 13 Jul 2024, 12:00  Specialty Name - Urology  Type - Urol Flexi Cystoscopy Diag  Booking Status - <span style="border: 1px solid green; padding: 2px;">Attended</span>  Clinic - 2024-07-13 # Mr Samuel Bishara - Sat - AM  Referral ID - 63476316</p> <hr/> <p> <b>Urol Flexi Cystoscopy Diag</b></p> <p>Start Date Time - 13 Jul 2024, 10:00  Specialty Name - Urology  Type - Urol Flexi Cystoscopy Diag  Booking Status - Rescheduled  Referral ID - 63476316</p>
(3)	<p><b>[SKIP THIS STEP]</b></p> <p>If the patient indeed does not need transport:</p> <p>Check in Soliton if the patient have diagnostic</p>	

	appointments booked on that day to make sure to avoid cancelling a required transport booking	
4	<p>Go back to main screen and <b>select the appointment</b> with transport that require a cancellation</p> <p>Once selected, click on '<b>Cancel journeys</b>' button</p>	

A popup will appear with:

1/ a check that you have verified that the patient does not have any diagnostics planned on the same day

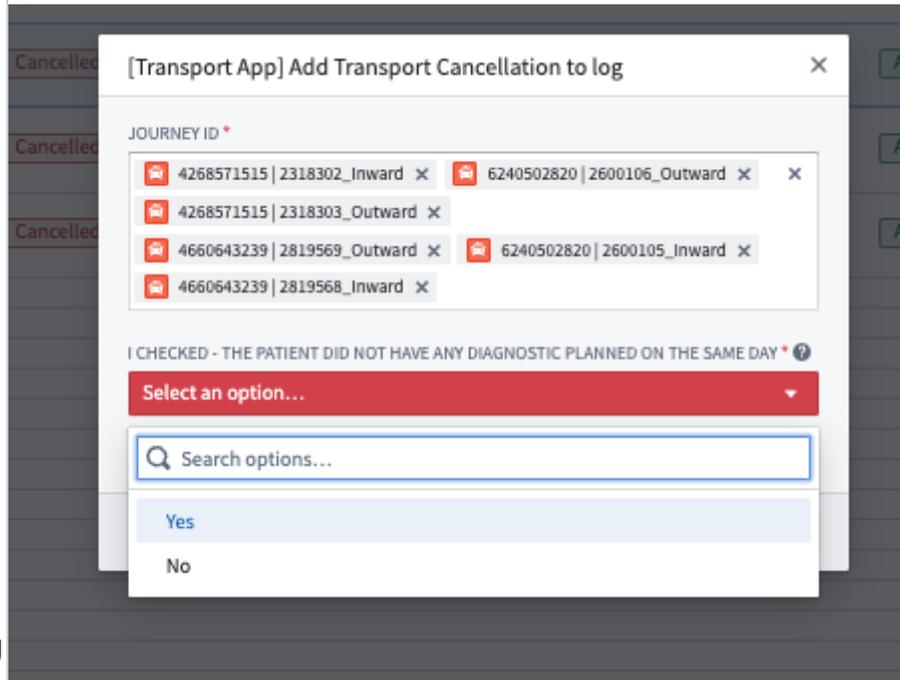
2/ Once you click Yes, further details required to Log the cancellation request:

Action Type – Do NOT Change

Request Status – Not requested to HATS by default. Keep this if you are not sending the data to HATS yourself. It will log it to the cancellation log for someone to send to HATS.

Comment Evidence – Provide some context to your request

1/



2/

5

3/ Submit

[Transport App] Add Transport Cancellation to log

JOURNEY ID \*

- 4268571515 | 2318302\_Inward ×
- 6240502820 | 2600106\_Outward ×
- 4268571515 | 2318303\_Outward ×
- 4660643239 | 2819569\_Outward ×
- 6240502820 | 2600105\_Inward ×
- 4660643239 | 2819568\_Inward ×

I CHECKED - THE PATIENT DID NOT HAVE ANY DIAGNOSTIC PLANNED ON THE SAME DAY \* Edited

Yes ×

ACTION TYPE \*

CANCEL TRANSPORT ×

REQUEST STATUS \*

Not Requested to HATS ×

COMMENT EVIDENCE \*

Cancel Submit

3/

Cancel Submit

6

Go on to the next items.  
The appointments you have already requested a cancellation for will disappear (and show in the bottom section 'Dismissed & Requested cancellation')

Appointment view   Clinic view [WIP]   Transport check last update: [WIP] 16 Jul 2024, 15:41															
NHS Number	Original Appointment Date & Time	Appointment Type	Specialty	Appointment Status	Hospital Site	Suggested Action	Reason For Request	Inward Journey ID	Inward Booking Status	Inward Appointment Time	Outward Journey ID	Outward Booking Status	Outward Appointment Time	Rescheduled Appointment Date & Time	Request Status
	16 Jul 2024, 15:45	Urology F/Up	Urology	Rescheduled	CW	Check - Other booked appointment on that day	Other active appointment(s) booked on same day	2817709	Active	16/07/2024 14:45:00	2817710	Active	16/07/2024 16:45:00	16 Jul 2024, 15:45	No Request
	16 Jul 2024, 15:45	Derm F/Up	Dermatology	Rescheduled	CW	Reschedule both journeys	Appointment rescheduled at a later date	2810056	Active	16/07/2024 14:45:00	2810057	Active	16/07/2024 16:45:00	27 Jul 2024, 16:45	No Request
	17 Jul 2024, 11:00	Podiatry F/Up	Podiatry	Cancelled	WMUH	Check - Other booked appointment on that day	Other active appointment(s) booked on same day	2818398	Active	17/07/2024 09:40:00	2818399	Active	17/07/2024 15:40:00	No value	No Request
	17 Jul 2024, 12:25	Ophth Injection New	Ophthalmology	Booked	CW	Check - Patient currently in hospital	Patient already admitted as Inpatient	2810040	Active	17/07/2024 11:25:00	2810041	Active	17/07/2024 17:25:00	No value	No Request
	17 Jul 2024, 11:30	Diab Foot New	Diabetic Medicine	Booked	WMUH	Check - Patient currently in hospital	Patient already admitted as Inpatient	2825135	Active	17/07/2024 10:30:00	2825136	Active	17/07/2024 16:30:00	No value	No Request
	17 Jul 2024, 11:20	ENT 2ww New	ENT	Booked	WMUH	Check - Patient currently in hospital	Patient already admitted as Inpatient	2824998	Active	17/07/2024 10:20:00	2824999	Active	17/07/2024 12:20:00	No value	No Request
	17 Jul 2024, 17:20	Plastics Craniofacial F/Up	Plastic Surgery	Rescheduled	CW	Check - Other booked appointment on that day	Other active appointment(s) booked on same day	2806876	Active	17/07/2024 16:20:00	2806877	Active	17/07/2024 18:20:00	17 Jul 2024, 17:20	No Request
	17 Jul 2024					Check - Patient currently in	Patient already admitted			17/07/2024			17/07/2024		
Cancellation															
NHS Number	Original Appointment Date & Time	Appointment Type	Specialty	Appointment Status	Hospital Site	Suggested Action	Reason For Request	Inward Journey ID	Inward Booking Status	Inward Appointment Time	Outward Journey ID	Outward Booking Status	Outward Appointment Time	Rescheduled Appointment Date & Time	Request Status
	16 Jul 2024, 15:00	Cardiology New	Cardiology	Cancelled	WMUH	Cancel both journeys	Appointment cancelled	2665899	Active	16/07/2024 14:00:00	2665900	Active	16/07/2024 20:00:00	No value	Requested
	17 Jul 2024, 14:30	Urol Flexi Cystoscopy Diag	Urology	Rescheduled	WMUH	Cancel both journeys	Appointment rescheduled in the past	2819568	Active	17/07/2024 07:30:00	2819569	Active	17/07/2024 13:30:00	13 Jul 2024, 12:00	Requested
	17 Jul 2024, 17:20	Plastics Craniofacial F/Up	Plastic Surgery	Rescheduled	CW	Reschedule both journeys	Appointment rescheduled at a later date	2592712	Active	17/07/2024 16:20:00	2592713	Active	17/07/2024 22:20:00	11 Sept 2024, 17:50	Requested
	29 Jul 2024, 12:50	Gen Surg New	General Surgery	Booked	CW	Check - Patient currently in hospital	Patient already admitted as Inpatient	2820247	Active	29/07/2024 11:50:00	2820248	Active	29/07/2024 13:50:00	No value	Dismissed

7

Once the list is cleared and there is no more suggestion cancellation, click on 'NEXT' in the step menu bar

### 3 - Adding a rescheduling request to the log

Same process as for Cancellation suggestion, but clicking on 'Rescheduling Journeys' once you have checked that the journey indeed needs rescheduling.

## 4 - Dismissing a suggested cancellation/rescheduling request

If after checking the patient information, you realise that the transport booking does not need to be cancelled, click on the 'Dismiss' action button to indicate that you have checked the item, and no transport booking needs to be cancelled/rescheduled based on the information available.

Step	Description	Illustration
4	Go back to main screen and <b>select all the appointment</b> with transport that require a cancellation  Once selected, click on ' <b>Dismiss</b> ' button	
5	A popup will ask for comment around that dismissal  Once provided – Click Submit  That will hide this item from the list	
6	This item now only appear in the 'Dismissed & Requested cancellation'	

## 5 - Managing 'Checks' suggested actions

Some items are marked as 'CHECKS' as depending on the scenario, you may make a decision that the transport is still required or not.

Example if a patient is in the hospital the transport for their next OP appointment may not be required if there Anticipated Discharge Date (ADD) is later than the OP appointment time. But a patient with multiple appointment on the same day and only on

appointment being cancelled may still need their transport booked.

So depending on the scenario, you will make a decision for each item on the list to Cancel journeys, Reschedule journeys or Dismiss. (see 2, 3 , 4 in the guide).

## 6 - Submitting the daily report to HATS

Before 3pm everyday, the list of cancellation added on the day to the cancellation log needs to be sent to HATS.

This step will be managed by a manger in charge of liaising with HATS.

In order to generate the report for HATS you will follow the following steps:

Step	Description	Illustration
1	In the Transport app stepper, click on Step 5 'Submission to HATS'	
2	Make sure you <b>update the Start Date &amp; Time</b> to reflect the last time the report was sent to HATS (indeed that will filter the list for for request made SINCE that last export).  Optional - click on ' <b>Hide Missed</b> ' checkbox, to hide request too late to be submitted to HATS.	
3	Once ready, click on 'SUBMIT' button in the top right hand corner of the page	
4	A pop-up appears, click on 'Export Daily Report' to generate the report to send to HATS.	
5	Close the pop-up and select all the items in the list appearing on the screen.	

6	Mark them as ' <b>requested to HATS</b> ' by clicking on the button and <b>submitting</b> .  END OF THE PROCESS	
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## 7 - Undo a dismiss request action

If you have inappropriately dismissed an item from the list and want to move it back to the list of items to manage, you revert the action by following the following steps:

Step	Description	Illustration
1	Open the Dismissed and Requested section by clicking on the arrow sign	
2	Select the item you want to send back to the list to manage and click on Modify.	
3	A pop-up will open, leave the relevant comment to explain the reason for modifying your request and then Click on SUBMIT.	
4	The modified item will reappear in the list of items to manage.  Close the 'Dismissed & requested' section by clicking on the arrow again.	

## 8 - Undo a Cancellation/rescheduling request action

In order to undo a cancellation request made, you need to dismiss the related requests added to the Cancellation Log by following the following steps:

Step	Description	Illustration
1	Find the item you want to undo the cancellation request in the 'Dismissed and Request' section (see above)  Note the <b>NHS number</b> and the <b>appointment date</b> of the request you want to cancel.	
2	Move the to the Cancellation Log in the top menu	
3	Open the filter section on the left by clicking on the arrow sign.	

4	Fill in the NHS number and click 'enter'	
5	Select the both relevant items (inward and outward journeys) that you want to cancel the request for. (please note that for each cancellation request you made, you would have 2 cancellation request in the log (inward and outward journeys)	
6	Once selected, Click on the 'Dismiss' action button in the top left hand corner.	
7	A popup will open to confirm you want to dismiss the request. Please add a comment to explain the reason for undoing the action, and then click on 'SUBMIT'	
7	Once the cancellation requests are marked as dismissed in the cancellation log, go back to the step by step process.  The item will now be back in the list to manage as their is no 'Active' transport cancellation request for this appointment.	

## 9 - Rebooking rescheduling requests into HATS

Once you have identified the patient in CCS, ahead to the HATS booking portal and follow the step by step guide to booking transport.

### Step 1:

In order to identify items requiring to be rescheduled in the Transport Cancellation App, click on Appointment to reschedule in the top Menu

### Step 2 (optional):

Filter the list for your **site** and **specialty** using the filters at the top of the page

### Step 3:

Note the **NHS number** and the **rescheduled date for the appointment** in the highlighted column.

**Step 4:**

Access the trust's homepage and search "Transport" as shown below.

**Step 5:** Click the highlighted as shown below "Patient Transport (Non-Emergency Patient Transport)"

**Step 6:** It will then lead you to this page in which you click highlighted as shown below "[Cleric transport booking system—Chelsea and Westminster site](#)"

**Step 7:**

It will then lead you to the log in page for Hats Transport.

Log in with your Username and Password.

Example below

**Step 8:** Hover over "**Registration**" then click on "**Booking**"

**Step 9:** Search for the relevant patient for transport as shown below (highlighted) using the NHS number used in step 3.

**Step 10:**

Click on "New Booking" or if it's a regular transport patient, you can click on "Find Patient" and it should come up with automatic details of the patient. However, if it's a new patient for transport... scroll down for more steps.

**Step 11:** Fill out the necessary details for the patient – as seen below example.

You will also need to fill in the address of the patient.

**Step 12:** Select the date of appointment using the appointment date noted in Step 3.

**Step 13:**

You will need to fill in the Journey Details as shown below with relevant information in relation to the patients' needs.

**Step 14:** Select relevant category

**Step 15:** Continue to complete the rest of Journey Details. Please add “Journey Notes” if necessary.

**Step 16:** Click “Home Address” and it should automatically fill in the address space.

**Step 17:** Fill in the Requestee Details as show below with your details.

**Step 18:** Mark the item as updated in CCS

**Select** the item you just rescheduled and then click on ‘**Mark as Rescheduled**’

Confirm that the request was made in HATS, by clicking on ‘SUBMIT’

**Final step:** Move on to the next item in the list as per step 3.

NB: Note that the item you just marked as Rescheduled in source system should disappear from the list.

## Suggested action logic and explanations

Here are some explanations to the logic applied in the pipeline to generate the **suggest action** column

### Cancel both journeys

- Appointment status = Cancelled with no rescheduled date
- Appointment status = Rescheduled and rescheduled appointment happened already (date in the past)
- Patient has a date of death

**ACTION:** Check using the patient information details that the reason for suggesting a cancellation are accurate.

- Yes --> Cancel both journeys
- No --> Dismiss + raise case with Digital team

### Reschedule both journeys

- Original Appointment status = Reschedule & rescheduled Appointment date is in future

**ACTION:** Check using the patient information details that the reason for suggesting a cancellation are accurate.

- Yes --> Cancel both journeys
- No --> Dismiss + raise case with Digital team

### CHECK - Other appointments on same day

- Appointment status = Cancelled or Rescheduled but patient has at least one other appointment on same day still showing with a 'Booked' status

**ACTION:** Validate that the other appointment planned on the day is indeed still going to happen.

- Yes --> Dismiss the alert, if not then
- No --> Cancel the transport booking

## CHECK – Patient already in hospital

- Appointment status = Booked but patient is currently occupying a bed within the hospital

**ACTION:** Check if patient will be send back home before their Outpatient appointment using the Anticipated Discharge Date to evaluate whether the transport booking needs to be cancelled or not

- If ADD is after the appointment date --> Cancel booking
- If ADD is way before the OP appointment --> Dismiss
- If both dates are close --> Add a comment with a date to check again closer to the OP appointment date to see if ADD has changed