

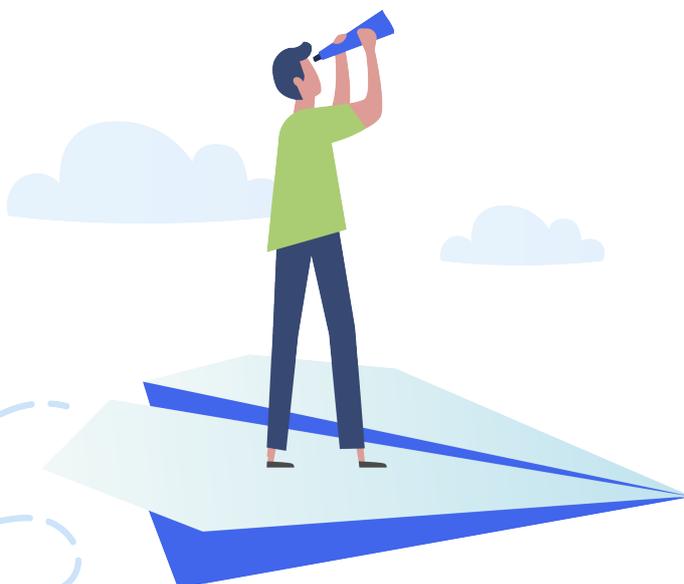


Appointments

Appointments Setup Release 3.1

Version 1.1

08 April 2021



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Appointments Setup Release 3.1

Appointments Setup release **3.1** contains the following new features and improvements:

- **National Slot Categorisation** - In **England** National Slot Categorisation is being introduced by NHS Digital, to align the slot types in **Appointments Setup** with an agreed set of national slot categories. You are required to map all slot types to a national slot category.

 **Important** - Only available to users on release DLM 800 or later.

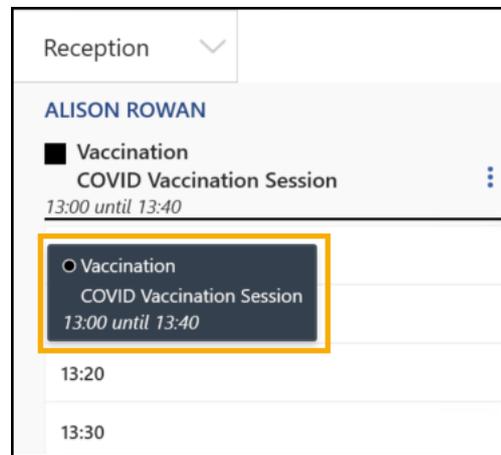
 See [National Slot Categorisation - England Only on page 6](#) for more information.

- **SMS Messages** - This release introduces the ability to automatically send SMS (text) messages, from **Appointments**, to patients, keeping them advised of any appointment bookings, updates or cancellations.

 See [SMS Messaging on page 16](#) for more information on using **SMS Messaging** in **Appointments Setup**.

 See [SMS Messaging](#) for more information on using **SMS Messaging** in **Appointments**.

- **Sessions** - Session names can now be a maximum of 20 characters, and you can add a description of up to an additional 30 characters. This additional information displays fully in a tooltip when viewing a session in the **Reception View**:



 See [Creating a Session](#) for more information.

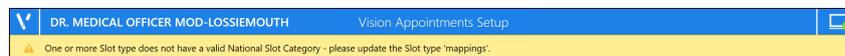
National Slot Categorisation - England Only

National Slot Categorisation is a requirement from NHS England to align the slot types in use in your **Appointments** system with an agreed set of national slot categories. You are required to map all slot types to a national slot category.

To assist in mapping your **Slot Types**, there are now four options under **Slot Types** in the **Appointments Setup** menu:

- [Slot Types – Practice on the facing page](#)
- [Slot Types – National on page 9](#)
- [Slot Types – Mapping on page 10](#)
- [Slot Types – Import on page 13](#)

Until you map your **Slot Types** to valid **National Slot Categories** the following message displays "One or more Slot type does not have a valid National Slot Category - Please update the Slot type 'mappings'." when category mapping is required:

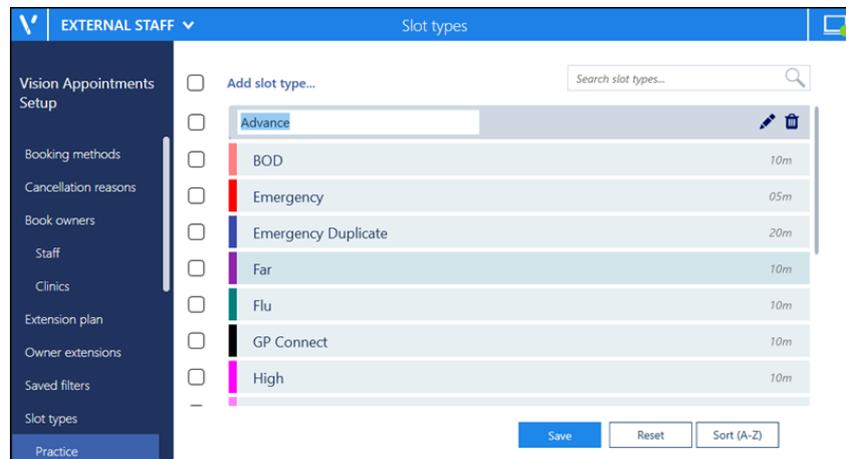


 **Note** - This will not stop you using existing slot types however on creation slot types need to be mapped to a category.

National Slot Categories are maintained by NHS Digital and are updated periodically. When categories are added, updated or inactivated you receive a file to import.

Slot Types – Practice

Select **Slot Types - Practice** to add, view and edit **Slot Types**:



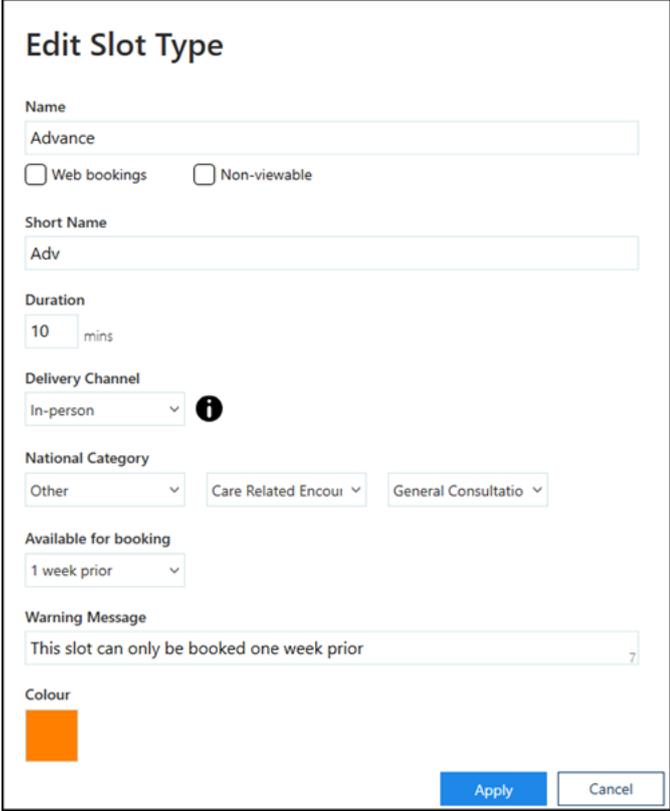
i Important - To facilitate reporting on vaccination appointments any COVID vaccination appointment slots should have a **Slot Type** of COVID VACS. This is essential for England however it is recommended to use elsewhere to help manage your appointment books. See [Slot Types Overview](#) for more information.

Adding a National Category to a Slot Type

To add a **National Slot Category** to a slot type:

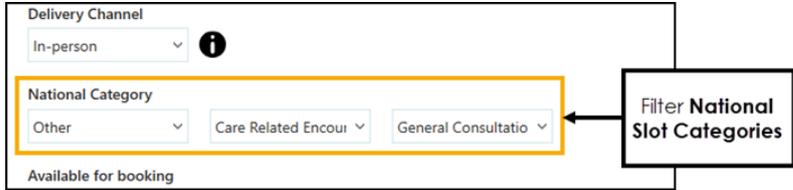
1. From the **Appointments Setup menu**, select **Slot Types - Practice** and the list of your existing slot types displays.
2. Select the **Slot Type** required and then select **Edit** .

3. The **Edit Slot Type** screen displays:



4. From **National Category** options, select the category that fits the selected **Slot Type** from:

- **Setting** - Select where appointments, booked with this slot type, should take place.
- **Type** - Select the type of appointment this slot type is used for.
- **Category** - Select the appropriate **Category** for this slot type.



5. Select **Apply**  to save the changes.

Slot Types – National

From the **Appointments Setup** menu, select **Slot Types - National** to view a list of all the available **National Slot Categories** as provided by NHS Digital:

| EXTERNAL STAFF | | Visit Appointments Setup | | | | |
|--------------------------|-------|--------------------------|------------------------|---|---|--|
| | ID | Setting | Type | Category | Description | |
| Visit Appointments Setup | 10101 | General Practice | Care Related Encounter | General Consultation Acute | An urgent appointment to provide care or advice to a patient as soon as possible; Occurrence or escalation of an illness or disease / Significant worsening of a current (illness) or disease(s) / Or other acute concerns about their health or wellbeing. | |
| Booking methods | 10102 | General Practice | Care Related Encounter | General Consultation Planned | A planned consultation or follow up. May include patients with undifferentiated problems. The actual activity which takes place is not known in advance. | |
| Cancellation reasons | 10103 | General Practice | Care Related Encounter | Scheduled/Planned Clinical Activity | Clinical activity for a patient with defined problems, healthcare issues or care pathway. The actual activity which takes place is known in advance. | |
| Book owners | 10104 | General Practice | Care Related Encounter | Scheduled/Planned Clinical Procedure | Clinical procedure performed by a health care practitioner or assistant / Involves a combination of special skills or abilities / May require drugs, devices, investigations or dressings. | |
| Staff | 10105 | General Practice | Care Related Encounter | Unscheduled/Unplanned Clinical Activity | An extra slot/session added/created on the day to supplement planned sessions to meet on the day demand. Would not previously be created and embedded. To be used to identify additional demand. | |
| Clinics | 10106 | General Practice | Care Related Encounter | Walk in Clinic | Planned walk-in clinic. Patients do not have a specific personal appointment time. This is an open consultation session. | |
| Extension plan | 10107 | General Practice | Care Related Encounter | Triage | A slot for the purpose of clinically triaging a patient. The mode of the triage could take place by any means such as face-to-face, telephone, online, video. Triage performed by a health care professional. | |
| Owner extensions | 10108 | General Practice | Care Related Encounter | Home Visit | A consultation in a patient's home. Can be in response to a request or at practice invitation for an urgent/priority reason. | |
| Saved filters | 10109 | General Practice | Care Related Encounter | Care Home Visit | A consultation in a care home, palliative care and other out-of-practice settings. Can be in response to a request or at practice invitation for an urgent/priority reason. | |
| Slot types | 10110 | General Practice | Care Related Encounter | Group Consultation and Group Education | An appointment where care is provided to multiple patients such as lifestyle awareness, drug and alcohol or mother and baby sessions. | |
| Practice | 10111 | General Practice | Care Related Encounter | Structured Medication Review | A Structured Medication Review delivered as part of the Network Contract DES "Structured Medication Review and Medication Optimisation" service requirement. | |
| Mapping | 10112 | General Practice | Care Related Encounter | Patient contact during Care Home Round | Patient contact occurring through care home round delivered as part of the Network Contract DES "Enhanced Health in Care Homes" service requirement. | |
| Import | 10113 | General Practice | Care Related Encounter | Care Home Needs Assessment / Personalised Care / Support Planning | Care home needs assessment and/or personalised care and support planning provided to care home residents as part of the Network Contract DES "Enhanced Health in Care Homes" service requirement. | |
| Session types | 10114 | General Practice | Care Related Encounter | Social Prescribing / Care Coordination appointment | Social prescribing or care co-ordination appointment, usually delivered by a social prescribing link worker, health and wellbeing coach, or care co-ordinator. | |
| Sessions | 10115 | General Practice | Care Related Encounter | Service provided by organisation external to the practice | Services provided by organisations external to the practice and GP / PCN contract but that use practice facilities such as physiotherapy, community health or other. | |
| Weekly plans | 10116 | General Practice | Care Related Encounter | Non-contractual chargeable work | Health related checks for which the patient pays; DVA checks, other employer medical checks and insurance medical checks. | |
| GP connect | | | | | | |
| ODS codes | | | | | | |
| Presets | | | | | | |



Note - This list for reference only, it is maintained by NHS Digital and is updated periodically.

Slot Types – Mapping

From the **Appointments Setup menu**, select **Slot Types - Mapping** to display all slot types and the mapped **National Slot Categories**.

From here you can add a category to multiple slot types. To select the **Slot Types** to update, you can filter by:

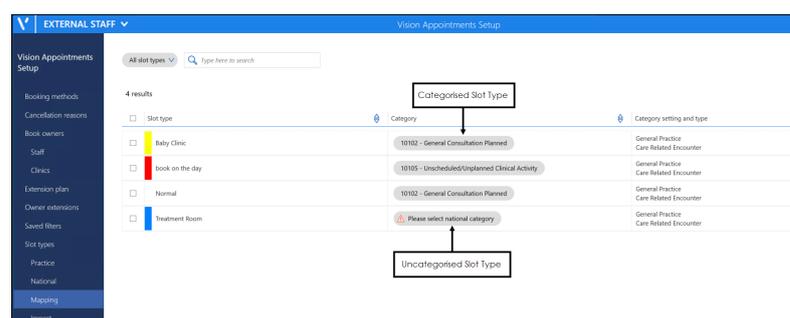
- **All Slot Types.**
- **Categorised.**
- **Uncategorised.**
- **Items with outdated categories** - flags any categories that are no longer in the list displayed in **Slot types - National**. If these are still in use, they need to be reviewed and a new category attributed.

Set a Slot Type Category

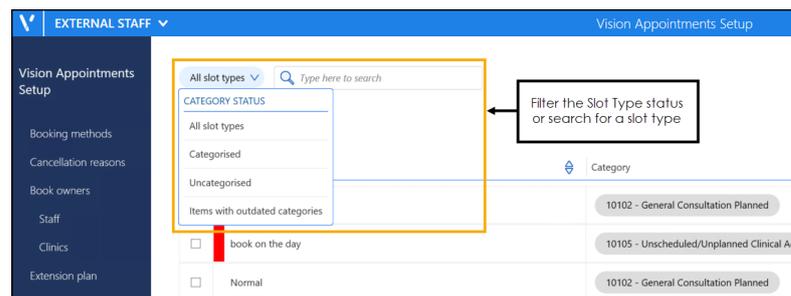
From **Slot Types - Mapping** you can select the category for multiple slot types at the same time.

To set a slot type category for multiple slot types:

1. From the **Appointments Setup menu**, select **Slot Types - Mapping**, the **Mapping** screen displays:



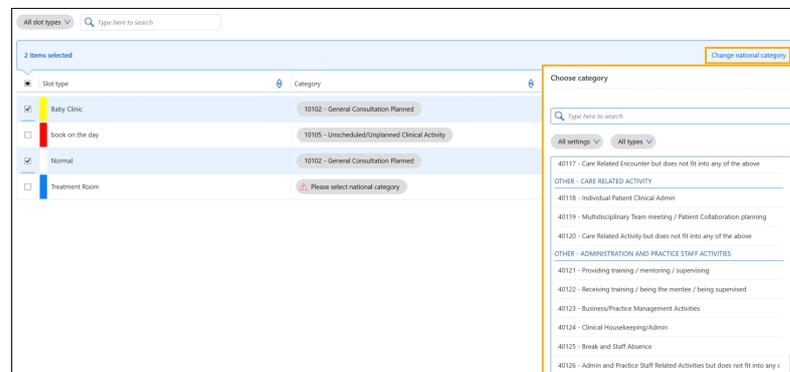
2. Filter the slot types, if required:



3. Tick all the slot types to map to the same category.

4. Select **Change national category**.

5. A list of the national slot categories displays:



6. Use the filters to find and select the required category:

Choose category

Type here to search

All settings ▾ All types ▾ ← Filter categories

40117 - Care Related Encounter but does not fit into any of the above

OTHER - CARE RELATED ACTIVITY

40118 - Individual Patient Clinical Admin

40119 - Multidisciplinary Team meeting / Patient Collaboration planning

40120 - Care Related Activity but does not fit into any of the above

OTHER - ADMINISTRATION AND PRACTICE STAFF ACTIVITIES

40121 - Providing training / mentoring / supervising

40122 - Receiving training / being the mentee / being supervised

40123 - Business/Practice Management Activities

40124 - Clinical Housekeeping/Admin

40125 - Break and Staff Absence

40126 - Admin and Practice Staff Related Activities but does not fit into any c

7. Select **Save** to save your changes or **Reset** to cancel any changes:

Save Reset

Slot Types – Import

When **National Slot Categories** are added, updated or inactivated you receive a file detailing all the changes.

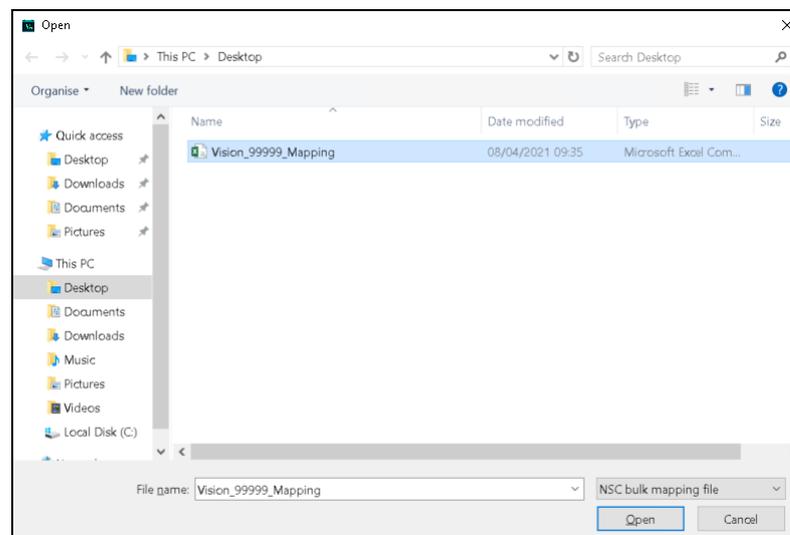


Remember - You can filter and review items with outdated categories in the **Slot Types - Mapping** screen.

From **Slot Types - Import** you can import a file provided to you by the NHS following an update to the list of **National Slot Categories**. The file proposes mass changes to the Slot Types.

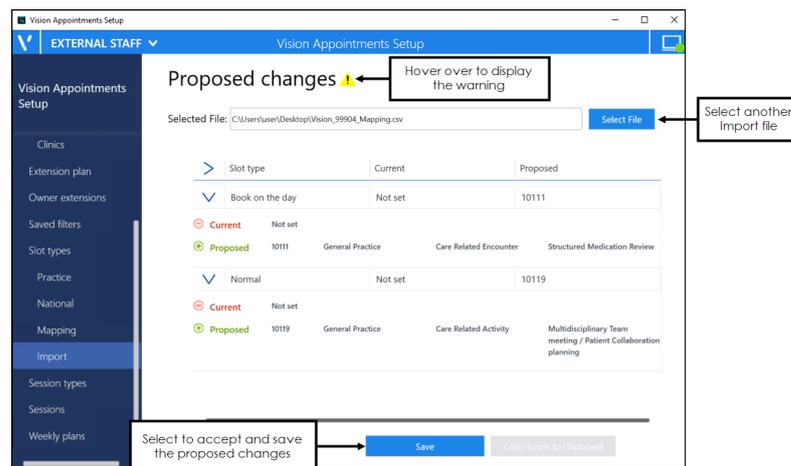
To view the proposed changes:

1. Save the file provided to you by the NHS to your computer.
2. From the **Appointments Setup menu** select **Slot Types - Import**.
3. The **Open** screen displays:



4. Locate and highlight the file you saved and select **Open**.

5. The centrally proposed changes display:



6. Select **Save**  to accept and save the proposed changes.

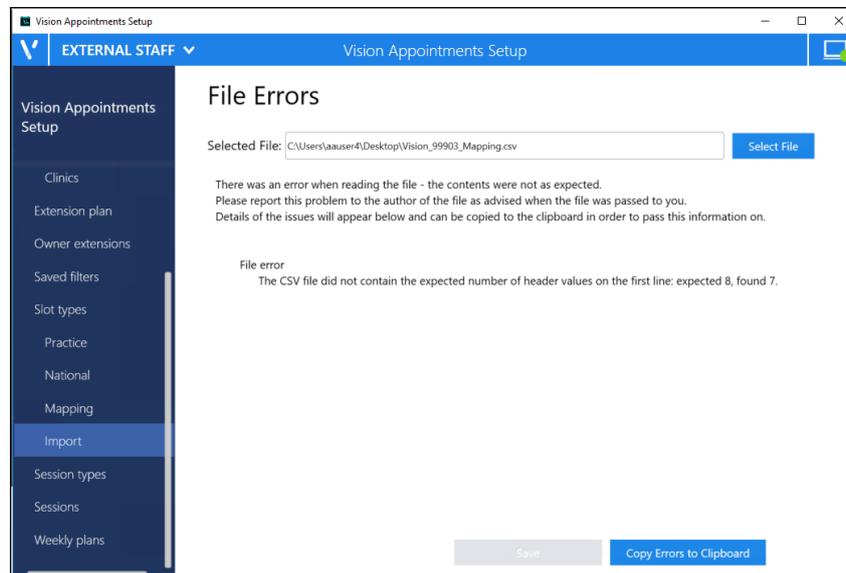
7. If required, select **Select File**  to find and process another file.

8. You can navigate away from the proposed changes screen without saving the changes if required.

9. Your **National Slot Categorisation** mapping should now be reviewed, see [Slot Types – Mapping on page 10](#) to review any additional or outdated categories.

File Error

If there is a problem with the selected file the **File Errors** screen displays:



Select either:

-  **Select File** to find and process a different file.
-  **Copy Errors to Clipboard** to copy to the Windows clipboard and paste into a document to action as required.

SMS Messaging

The ability to automatically send SMS (text) messages to let patients know that their appointment has been booked, rescheduled or cancelled can help cut down the number of DNAs and mis-communications.

Appointments Setup can be configured to automatically send SMS messages.

 **Important** - SMS messaging must be enabled and set up prior to it being available, please contact your Account Manager for more information.

 **Note** - Once enabled SMS message defaults to **OFF** for every user.

To switch the **SMS Messaging** facility on or off per user select:

-  **On** to **automatically** send SMS messages when an appointment is made or updated in any way.
-  **Off** to prevent SMS messages being sent. Any appointment changes display in **SMS History** as 'Failed'.

The **SMS messages** sent are not configurable, the messages sent are as follows with the appropriate patient and appointment information merged:

| Appointment Booked | Appointment Cancellation | Appointment Reschedule in progress |
|--|---|---|
| An appointment has been made for you at <u>09:00</u> on Monday 7th December with BABY CLINIC at Test Surgery | Your appointment at <u>10:00</u> on Monday 7th December with BABY CLINIC has been cancelled | Your appointment at <u>09:50</u> on Tuesday 8th December with BABY CLINIC has been cancelled and will be rescheduled. You will receive a notification of the new time and date. |

SMS Counter

The **SMS Counter** displays the number of messages that you have sent since the count was last cleared. The colour of the counter indicates the status of the message(s):

-  **Grey** - No messages sent
-  **Green** - All messages were sent successfully.
-  **Yellow** - Some messages were sent successfully, some failed, check the history for details.
-  **Red** - All messages have failed, check the history for details.

 **Important** - The **SMS Counter** clears to zero when you log out of **Appointments Setup**.

SMS History

The **SMS History** screen displays all attempted **SMS Messages**, in time order with latest at the top.

To access the **SMS History** screen:

1. Select the **SMS Counter** .
2. The **SMS History** screen displays:

| SMS History | | |
|-------------|---|---|
| 14:05 | Type: Cancellation With Dr Shirley Anderson at 08:00 on 29-Oct-2020 Success: Sent | ALDER, Abby (Ms) NHS: 411 185 9240 Mobile: 07787 111 948 |
| 14:05 | Type: Cancellation With Dr Shirley Anderson at 08:05 on 29-Oct-2020 Failed: No valid mobile phone number found. | BACKHOUSE, Vincent (Mr) NHS: 411 113 9132 Mobile: |
| 14:05 | Type: Cancellation With Dr Shirley Anderson at 08:15 on 29-Oct-2020 Success: Sent | CEDAR, Cillian (Mr) NHS: 411 185 9747 Mobile: 07000 111 111 |
| 14:05 | Type: Cancellation With Dr Shirley Anderson at 08:25 on 29-Oct-2020 Failed: No valid mobile phone number found. | DACRES, Raymond (Mr) NHS: 411 120 8959 Mobile: |
| 14:05 | Type: Cancellation With Dr Shirley Anderson at 08:35 on 29-Oct-2020 Success: Sent | FIR, Flora (Ms) NHS: 411 186 1210 Mobile: 07000 111 111 |
| 14:05 | Type: Cancellation With Dr Shirley Anderson at 08:45 on 29-Oct-2020 Failed: No valid mobile phone number found. | GAFAN, Munawar (Miss) NHS: 411 123 4658 Mobile: |
| 14:05 | Type: Cancellation With Dr Shirley Anderson at 08:55 on 29-Oct-2020 Failed: No valid mobile phone number found. | HEMLOCK, Harriot (Ms) NHS: 411 186 3140 Mobile: |

Hide successful requests

Each entry displays the message type, message details and patient details.

- **Message Types:**
 - **Booking.**
 - **Reschedule.**
 - **Pending Reschedule** (Appointment has been moved to the clipboard).
 - **Cancellation.**

- **Successful messages** - Display 'Success: Sent'.
- **Failed messages** - Display 'Failed' with the reason why.

 **Note - Special Bookings** are not sent via **SMS message**.

From the **SMS History** screen you can select:

- **Hide successful requests** **Hide successful requests** - Tick to hide successful requests, with successful messages hidden, you can clearly see which messages failed and might need action taken.
- **Copy to Clipboard** **Copy to Clipboard** - To copy to the Windows clipboard and paste into a document to action as required.
- **Print** **Print** - To print the history list.

 **Training Tip** - You can print to a PDF if required.

- **Clear** **Clear** - To clear all history and reset the **SMS Counter** resets to zero.

 **Important** - The **SMS Counter** also clears to zero when you log out of **Appointments Setup**.

 **Important - SMS messaging** is available in a Shared Care Setting.
