

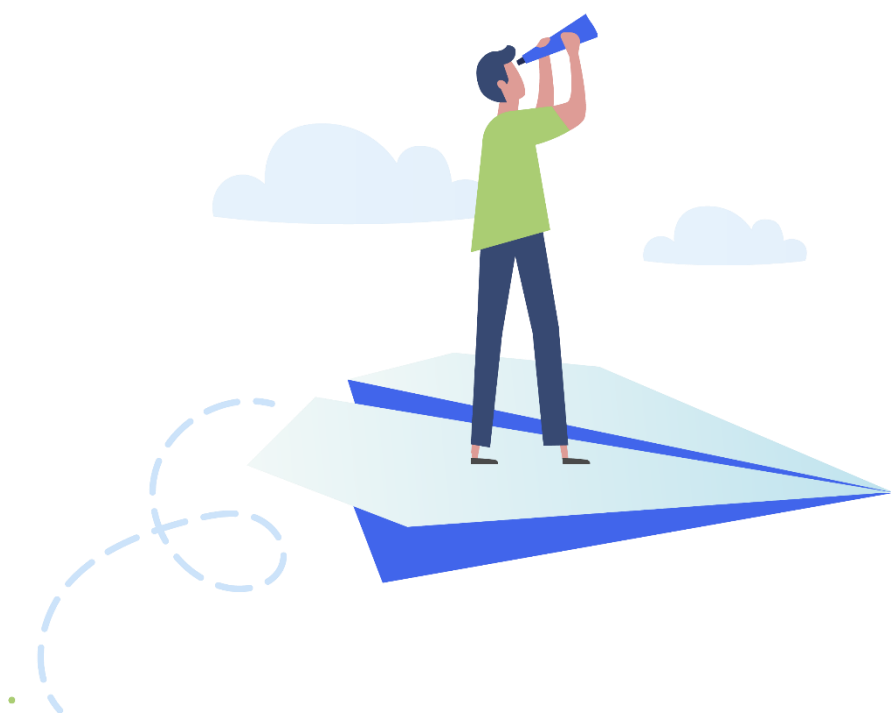


Appointments

Appointments 3.1 Release Guide

Version 1.2

22 February 2022





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Appointments Release 3.1

Summary of Changes

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

- **Viewing Audit History** - This release introduces the ability to audit slots enabling you to view any changes made, this includes alterations to the slot type, duration or, which patients have been booked in or cancelled. Each change is tracked by date and time and who was logged in when the change was made.



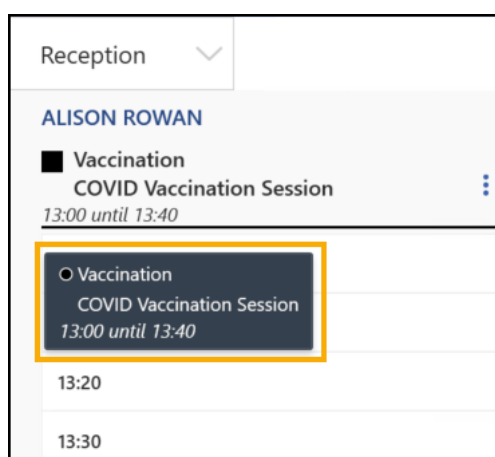
See [Viewing the Audit History of a Slot](#) on page [6](#) for more information.

- **SMS Messaging** - 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 \(Shared Care\)](#) on page [10](#) for more information.

- **Sessions** - Session names can now be a maximum of 30 characters, and you can add a description of up to an additional 500 characters. This additional information displays fully in a tooltip when viewing a session in the **Reception View**:





- **National Slot Categorisation** - In **England** National Slot Categorisation is being introduced by NHS Digital, to align the slot types in **Appointments** 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.

- **Patient Details View** - You can now open the following **Vision 3** modules from the **Patient Details View**:
 - **Consultation Manager** - Select the patient's name to open the patient's record in **Consultation Manager**:

- **Registration** - Select **Open V Patient Registration** to open the patient's details in **Vision 3 Registration**:



Important - This is only available if you have **Vision 3** running on your workstation and you have access rights to either **Consultation Manager** for clinical records and / or **Registration** for registration records in **Vision 3**.



Viewing the Audit History of a Slot

You can view the audit history of a slot to see any changes made to it from creation up to but not including, deletion. Auditable updates include:

- Slot Type
- Duration
- Which patients have been booked in or cancelled.

Each change is tracked by date and time and who was logged in when the change was made.

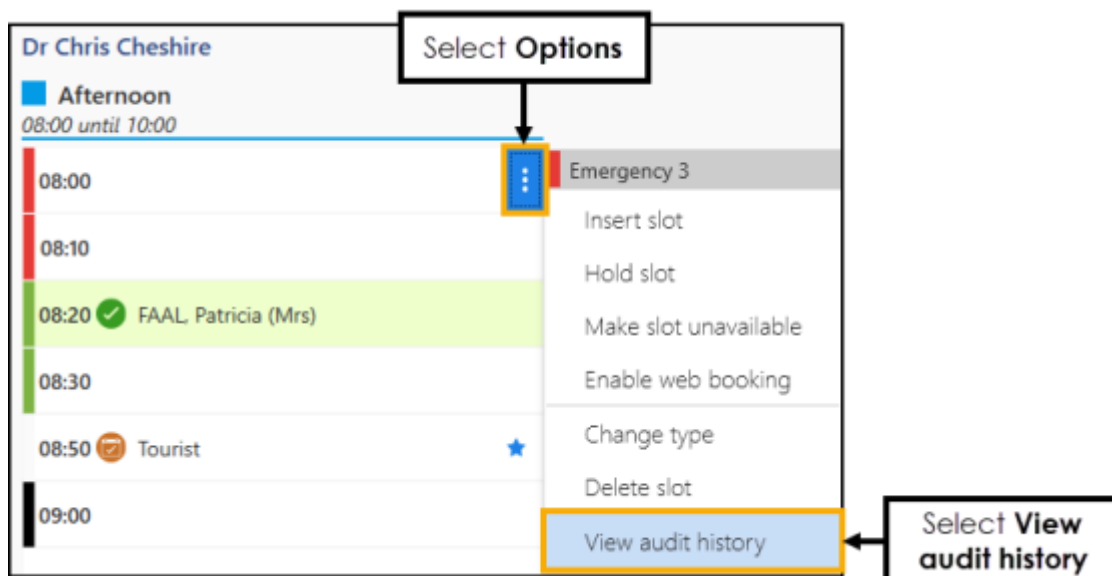


Note – If a slot is deleted its audit trail is not available as it is no longer in **Reception View**.

To view the audit trail:

- **From the Reception and Weekly Views**

From the **Reception** and the **Weekly** views, hover over the right of the patient's name, select **Options**  and then **View audit history**:



The screenshot shows the 'Dr Chris Cheshire' Reception View. The top section displays 'Afternoon 08:00 until 10:00'. Below this is a list of slots. The 08:20 slot is highlighted in green and contains the text 'FAAL, Patricia (Mrs)'. To the right of the 08:20 slot, a blue square with three white dots (the 'Options' menu) is highlighted with a yellow box. A black arrow points from a box labeled 'Select Options' to this menu. The menu is open, showing several options: 'Emergency 3', 'Insert slot', 'Hold slot', 'Make slot unavailable', 'Enable web booking', 'Change type', 'Delete slot', and 'View audit history'. The 'View audit history' option is highlighted with a blue box. A black arrow points from a box labeled 'Select View audit history' to this option. The 08:50 slot is highlighted in orange and contains the text 'Tourist'.

The **Slot Audit History** screen displays.




- **From the Booking Form**

From the appointment booking form select **View audit history**:

The screenshot shows the appointment booking form for Tuesday 1st Dec 2020 at 08:00 with Dr Chris Cheshire at Local Practice, Emergency 3. A box labeled "View audit history" points to a link in the top right corner. Another box labeled "Select View audit history" points to the same link. The form includes fields for Patient name, Booking method, Appointment comments, and a Duration of 10 mins. There are "Book" and "Cancel" buttons at the bottom.

The **Slot Audit History** screen displays.

- **From Patient Appointments**

From a patient's appointment record, hover over the right of the appointment, select **Options**  and then **View audit history**:

The screenshot shows the Patient Appointments screen with a table of appointments. A box labeled "Select Options" points to the options menu icon on the right side of the table. Another box labeled "Select View audit history" points to the "View audit history" link in the bottom right corner of the table.

Type	Date	Time	Book Owner	Slot Type	Comments / Cancellation Reason
Cancelled	Tue 01-Dec-2020	10:50	Dr Anthony Saldauria Local Practice	Routine	Cancellation Reason: hospitalised
Future	Tue 01-Dec-2020	10:50	Dr Anthony Saldauria Local Practice	Routine	
Cancelled	Tue 01-Dec-2020	08:00	Dr Chris Cheshire Local Practice	Emergency 3	Cancellation Reason: hospitalised
DNA	Mon 30-Nov-2020	08:30	Dr Anthony Saldauria Local Practice	Teddy Picnic	Loads of comments about how sick this patient is Loads of comments about how sick this patient is Loads of comments about how sick this patient is
DNA	Mon 30-Nov-2020	08:00	Dr Anthony Saldauria Local Practice	Normal?	
Post	Thu 26-Nov-2020	11:10	Dr Chris Cheshire Local Practice	Routine	
Cancelled	Thu 26-Nov-2020	10:50	Dr Chris Cheshire Local Practice	Routine	

The **Slot Audit History** screen displays.



Slot Audit History Summary



The **Slot Audit History** displays the audit trail of the slot. Every slot has a 'Slot created' history item:

Slot information

Audit History - Slot at 09:30 on Tue 01 Dec 2020 with Dr Chris Cheshire.

2 Results of 2 results

>	<input type="checkbox"/>	Changed on	Changed by	Change summary
>	<input type="checkbox"/>	Mon 30-Nov-2020 10:54	JCLA	Appointment booked
>	<input type="checkbox"/>	Fri 27-Nov-2020 14:36	JPLO	Slot created

- Select **Expand**  on each individual item to display more information, or
- Select the column header  to display all.

Slot Audit History

Audit History - Slot at 09:30 on Tue 01 Dec 2020 with Dr Chris Cheshire.

1 Results of 1 results

Select to expand all

Expanded history item

<input checked="" type="checkbox"/>	<input type="checkbox"/>	Changed on	Changed by	Change summary
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Fri 27-Nov-2020 14:36	JPLO	Slot created

Book owner	Session	Type	Starts at	Planned duration	Held by	Is available	Is overman	Is web	Cancel reason	Appointment
Dr Chris Cheshire	Afternoon	Normal	Tue 01-Dec-2020 09:30	10		Yes	No	No		



Training Tip - The latest change displays at the top of the list.



Comparing History Records

You can use the **Slot Audit History** screen to compare two of the specific slot updates side by side.

To compare two updates:

1. From the **Slot Audit History** screen, tick the required records and select **Compare**:

Slot Audit History

Audit History - Slot at 09:30 on Tue 01 Dec 2020 with Dr Chris Cheshire.

2 Items selected

	Changed on	Changed by	Change summary
<input checked="" type="checkbox"/>	Mon 30-Nov-2020 10:54	JCLA	Appointment booked
<input checked="" type="checkbox"/>	Fri 27-Nov-2020 14:36	JPLO	Slot created

Compare

2. The **Slot Audit History Comparison** screen displays, showing the two updates side by side:

Slot Audit History

Slot at 10:50 on Tue 01 Dec 2020 with Dr Anthony Salisbury.

Item	Value at Mon 30-Nov-2020 10:54	Value at Mon 30-Nov-2020 11:18:56
Changed by	JPLO	JPLO
Book owner	Dr Anthony Salisbury	Dr Anthony Salisbury
Session	Session AM	Session AM
Type	Routine	Routine
Starts at	Tue 01-Dec-2020 10:50	Tue 01-Dec-2020 10:50
Planned duration	10	10
Held by		
Is available	Yes	Yes
Is overrun	No	No
Is web	Yes	Yes
Cancel reason		hospitalised
Booking method	FLUE	
Comments		
Label	ABALLANAM JOHN 01/08/1963 E111122191	
Patient org code	55555	
Patient ID	2477	
Patient arrived at		
Consultation started at		
Consultation ended at		
Was booked online	No	
Appointment		

3. Changes are shown as below:

- **New item** **Cancel reason** - Displays in green with a +.
- **Changed item** **Comments** - Displays in blue.
- **Removed item** **Booking method** - Displays in red with a -.

4. Select **Back to list** to return to the **Slot Audit History** screen.



SMS Messaging (Shared Care)

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



Important - SMS messaging in **Appointments** is only available in a Shared Care Setting. You can send your practice level SMS messages using **Vision+**.

Appointments 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 messaging initially defaults to **OFF** for every user.

To enable/disable **SMS Messaging** 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 **SMS History** for details.
-  **Red** - All messages have failed, check the **SMS History** for details.



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

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

All

☐ Select All

<input type="checkbox"/>	15:47	Type: Cancellation With TOM PROCTOR at 05:20 on 21-Oct-2021 Failed: No valid mobile phone number found.	FORBES, Nicholas (Mr) NHS: 811 113 8210 Mobile:
<input type="checkbox"/>	15:46	Type: Booking With TOM PROCTOR at 05:20 on 21-Oct-2021 Failed: No valid mobile phone number found.	FORBES, Nicholas (Mr) NHS: 811 113 8210 Mobile:
	15:45	Type: Reschedule From: With TOM PROCTOR at 03:40 on 21-Oct-2021 To: With APPOINTMNT B1 4 TC 9938 at 12:00 on 21-Oct-2021 Success: Sent	ABALUNAM, John (Mr) NHS: 811 112 3191 Mobile: 07000 100100
	15:44	Type: Booking With TOM PROCTOR at 03:40 on 21-Oct-2021 Success: Sent	GROVES, Mary (Mrs) NHS: 811 113 8431 Mobile: 07999 998889
	15:43	Type: Pending Reschedule With TOM PROCTOR at 03:40 on 21-Oct-2021 Success: Sent	ABALUNAM, John (Mr) NHS: 811 112 3191 Mobile: 07000 100100
	15:43	Type: Booking With TOM PROCTOR at 03:40 on 21-Oct-2021 Success: Sent	ABALUNAM, John (Mr) NHS: 811 112 3191 Mobile: 07000 100100

Copy to Windows clipboard

Print

Clear

Close

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**.



3. Select the drop-down to filter the message types:

SMS History


☐ Select All

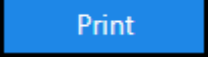
15:47 Type: Cancellation
With TOM PROCTOR at 05:20 on 21-Oct-2021
Failed: No valid mobile phone number found.

Mobile:

All
All
Successful
Not Sent
Failed
Mobile:

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

- **Copy to Windows clipboard**  - Copy the selected to the Windows clipboard and paste into a document to action as required.

- **Print**  - Print the list.



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

- **Clear**  - Clear the displayed messages.



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

- **Close**  - Close the **SMS History** screen.