

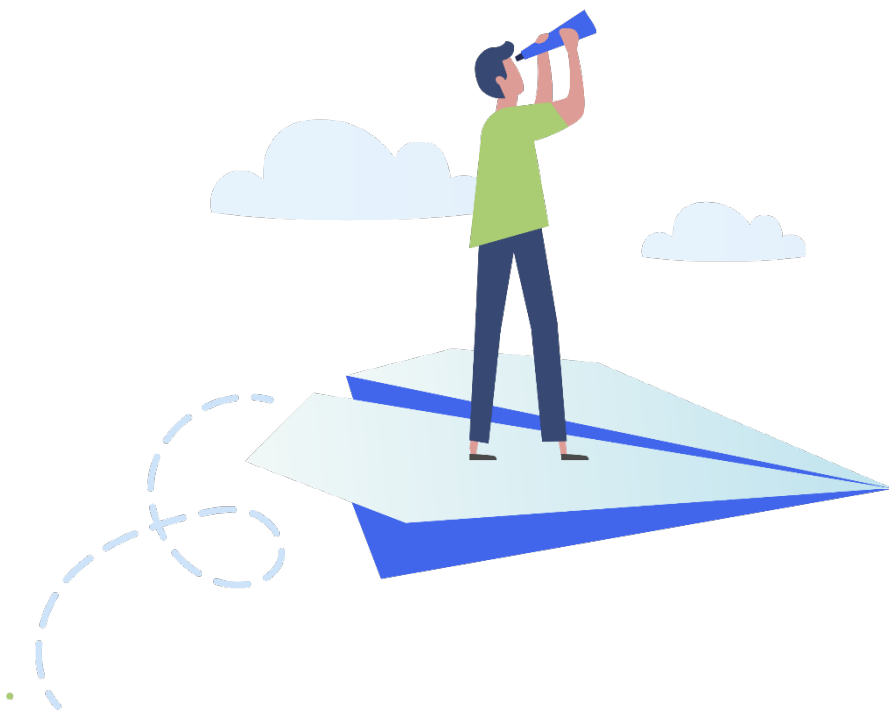


Appointments

Appointments Release 3.2

Version 3

20 July 2022





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Appointments Release 3.2


Appointments release **3.2** contains the following new features and improvements:

All Users

- **Slot Type - Restrictions** – You can now apply **Restrictions** to appointment slot types in **Appointments Setup**. This allows you to prevent bookings being made in **Appointments** for specific patients in specific slots. **Restrictions** can be set by age and/or sex, for example, you can apply a female only **Restriction** to a maternity slot type, or age restrictions to a baby clinic slot type.

When you select a slot, if it has a **Restriction** in place, the **Restriction** description displays in a yellow banner:

The screenshot shows the appointment booking interface for Thursday 31st Mar 2022 at 16:30 in the DAVID SATURN - Test Practice 4. The appointment is for Baby Immunisations. A yellow banner with a warning icon and the text "Patients aged 1 year - 2 years" is displayed. Below the banner, there are several form fields: "Special Booking" (checkbox), "Patient name" (search field), "Booking method" (dropdown menu set to "OTHER"), "Duration" (10 mins), "Appointment comments" (text area), and "Link another appointment" (checkbox). At the bottom right, there are "Book" and "Cancel" buttons. A "View audit history" link is visible in the top right corner.

 **Important** - Slot Type Restrictions do not apply for web enabled slots when being booked by your patients.

 See [Appointment Warnings](#) on page **11** for more details.



- **Preferences - General** – Contains the following new options:
 - **Enforce days/hours prior restrictions** - There is now a practice wide setting to enforce appointment booking restrictions.

If **Enforce days/hours prior restrictions** is:

- **Ticked** – You cannot book the appointment within the specified time period. This includes appointments being moved or copied from the clipboard.
- **Not Ticked** - The practice setting is not enforced, when booking a patient into a slot with a time limit you can select **Ignore 'Days Prior' restriction** to ignore the setting.




Important - Slot Type Restrictions do not apply for web enabled slots when being booked by your patients.

Timescale for slot retrieval

From To the end of the books
 days in the future

Free slot definition


Include "unbookable" free slots 

Include "overrun" free slots


Booking Appointments

Show option to merge slots when an appointment overruns free slots

Prevent concurrent appointments

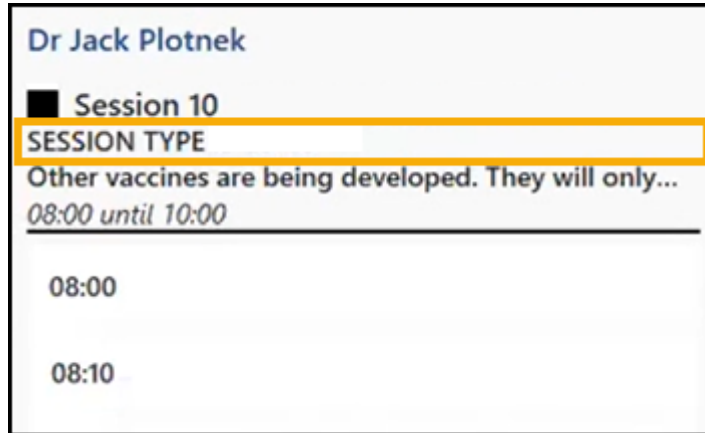
Enforce days/hours prior restrictions 

Patient search


Preferred search 



- **Session Type Display Options** - There is now a practice wide setting to display the **Session Type** below the **Session Header** in the Reception and Weekly screens:




This is set in **Preferences - Display Options**:

Slot search results style 


Calendar

List


Show header description for columns

Slot Background Colour 

Completed slots display in green

Session Type 

Display Session Type below Session Header

 **Training Tip** - If you select not to tick **Preferences - Display Options - Display Session Type below Session Header**, you can still view the **Session Type** in the tooltip if you hover over the **Session Header**.



- **Free Slot Search** - The free slot search screen now displays the full **Session name** and **Session additional information**:

Free slot search

Duration (mins) Any AM PM

Leeds

Mon 18 Oct Tue 19 Oct Wed 20 Oct Thu 21 Oct Fri 22 Oct Sat 23 Oct Sun 24 Oct Today THU-21-OCT 2021

N/A N/A 0 11 0 0 5

Page 1 / 2

| Owner | Session | Session additional info |
|---------------------|-------------------------------|---|
| 08:00 Alistair Avon | Clinical Pharmacist - Central | For Medication Reviews only - This incl... 10 mins |
| 08:10 Alistair Avon | Clinical Pharmacist - Central | For Medication Reviews only - This includes problem management areas and those referred by the POD. Any other prescription requests need to first go via appointments with the GP |
| 08:20 Alistair Avon | Clinical Pharmacist - Central | |
| 08:30 Alistair Avon | Clinical Pharmacist - Central | |
| 08:40 Alistair Avon | Clinical Pharmacist - Central | For Medication Reviews only - This incl... 10 mins |

Hover over the **Session name** to view the full session name and the session type, repeat for **Session additional info** to view the entire text.

- **Session Audit Trail** - You can now view the audit trail of a session.



See [Viewing the Audit History of a Session](#) on page 21 for more details.

- **Appointments Backup** - You can now set up an automatic backup of appointment data.




See [Preferences - Backup](#) on page 28 for more details.

- **Booking Consecutive Appointments** - To avoid confusion, we have

renamed **Book Multiple** to **Merge and Book**



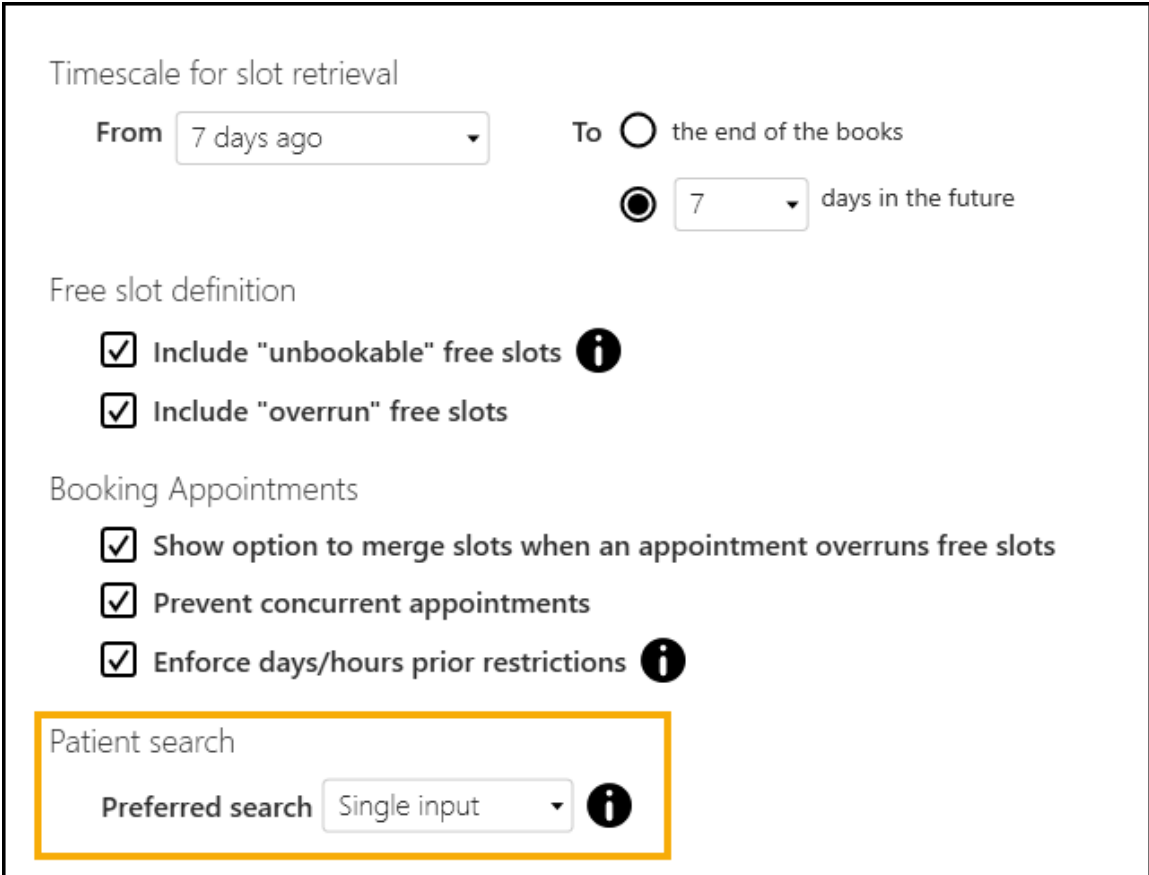
- **Patient Search** - You can now use the new **Patient search**  option to search for patients directly from the toolbar.
- **Clipboard change** - To avoid confusion **Clipboard** is now called **Appointments Clipboard**.



Practice Only Users

 **Note** - Only available if you access **Appointments** from the **Vision 3 Front screen**.


- **Preferences - General** – Contains the following new **Patient Search – Preferred Search** option:




Timescale for slot retrieval

From To the end of the books
 days in the future


Free slot definition

- Include "unbookable" free slots 
- Include "overrun" free slots

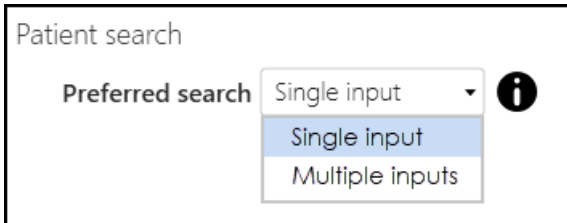
Booking Appointments

- Show option to merge slots when an appointment overruns free slots
- Prevent concurrent appointments
- Enforce days/hours prior restrictions 

Patient search

Preferred search 

You can now select your preferred default **Patient Search** screen view:



Patient search

Preferred search 

- Single input
- Single input
- Multiple inputs



Select one of the following methods of input:

- **Single input** - When you search for a patient, the **Patient Search** screen displays by default:

Search

Patient Search Legacy Patient Search Special Booking Search

Search term

Search for a patient...

- **Multiple inputs** - When you search for a patient, the **Legacy Patient Search** screen displays by default:

Search

Patient Search Legacy Patient Search Special Booking Search

Surname Forename


Enter the patient's surname... Enter the patient's forename...

Date of Birth

Enter the full or partial date of birth if known



Desktop Only Users

 **Note** – Only available if you access **Appointments** from your **Desktop**.

- **Import patients to the Appointments Clipboard** - You can now import patients from a CSV (Microsoft Excel) file to the **Appointments Clipboard**.

 See [Import to Appointments Clipboard](#) on page **24** for details.

- **Linked Appointments** - You can link appointments across multiple days, different clinicians/clinics or even across shared appointment books.

 See [Linking Appointments](#) on page **13** and [Linked Appointments Warnings](#) on page **18** for details.

Shared Care Users

- **Clipboard change** - To avoid confusion on the SMS History page, **Copy to Clipboard** is now called **Copy to Windows clipboard**.

 See [Appointments Setup Release 3.2](#) for details about what's new in **Appointments Setup**.

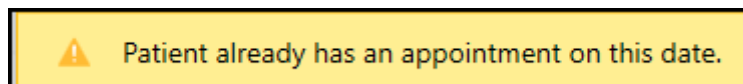


Appointment Warnings

When making appointments, you may see the following warnings on the booking form:

Patient already has an appointment on this date

If your patient already has an existing appointment on the same day the message '**Patient already has an appointment on this date**' displays.



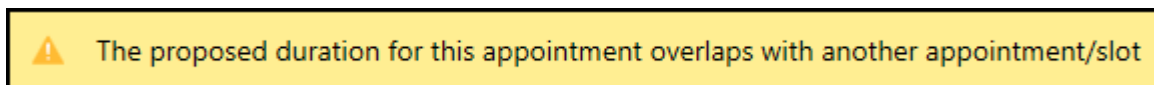
You can either:

- Book the appointment as normal.
- Select the **future appointments** button on the booking form to cancel the other appointment.

This slot conflicts with another appointment/slot

When you book an appointment and change the duration of the slot, the alert '**The proposed duration for this appointment overlaps with another appointment/slot**' displays.

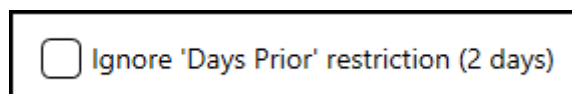
If you want to proceed, book the appointment as normal.



Note - The warnings do not stop you making an appointment.

Ignore Days Prior Restriction

If a slot has a **Restriction**, for example, Book on the Day, you must tick the '**Ignore "Days Prior" restriction (X days)**' to make the appointment:



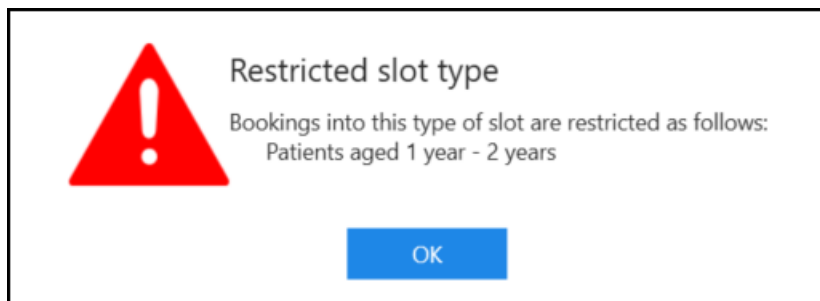


Slot Type Restrictions

If a slot has an age and/or sex **Restriction**, the **Restriction** description displays in a yellow banner:

The screenshot shows a booking form for a slot on Thursday 31st Mar 2022 at 16:30, titled 'DAVID SATURN - Test Practice 4'. The service is 'Baby Immunisations'. A yellow banner at the top of the form area displays a warning icon and the text 'Patients aged 1 year - 2 years'. Below the banner, there are several fields: 'Special Booking' (checkbox), 'Patient name' (search bar), 'Booking method' (dropdown menu set to 'OTHER'), 'Duration' (10 mins), 'Appointment comments' (text area), and 'Link another appointment' (checkbox). At the bottom right, there are 'Book' and 'Cancel' buttons.

If you try to book the slot for a patient who does not meet the **Restriction** criteria, a warning displays and you cannot continue:



➔ See [Appointments Restrictions](#) and [Applying Appointment Restrictions](#) in the **Appointments Setup** Help Centre for details on how to add and apply **Slot Type Restrictions**.



Linking Appointments

It is sometimes useful to link multiple appointments so your clinicians and administrative staff can see that any specific appointment is part of a group. Within **Appointments** you can link appointments, for example, a recurring appointment for ongoing dressing changes or blood pressure monitoring.



Note - This is only available if you access **Appointments** from your **Desktop**.

Appointments can be linked from:

Linking Appointments through the Booking Form

To link appointments from the booking form:

1. Book a patient into an appointment slot as normal.
2. From the **Booking form**, tick **Link another appointment**. This stores the patient's details and any additional appointments made for this patient are linked:

Monday 12th Jul 2021 View audit history
09:00 - CHRIS CHESHIRE - Leeds
Normal

FAIRFIELD, Patricia (Miss)
Leeds
NHS: 811 115 8300
Born: 01-Aug-2013

DNA (3) ×
Scheduled (0)
Completed (0)
Cancelled (3)

Retrieved from 2 of 2 services.

Patient notes ✎

Booking method Duration
 10 mins

Appointment comments
Enter appointment comments here

Link another appointment Tick Link another appointment


3. Select **Book**.



- Continue to book further appointments. The patient details populate automatically and the appointments link. A counter displays the number of appointments created for the patient so far:

2 appointment(s) created for the selected patient so far.

| | | |
|-------------------------|----------------------------|---------|
| Booking appointment for | FAIRFIELD, Patricia (Miss) | DISCARD |
| Registered at | INPS Leeds Test Practice | |
| with | Dr Susan Somerset | |
| Usual GP | Dr Unknown Unknown | |

 **Note** - You can link appointments across multiple days, different clinicians/clinics or even across shared appointment books.

- To finish booking linked appointments:
 - If you are booking the last known linked appointment, on the booking form remove the tick from **Link another appointment** so that it is no longer selected, or,
 - When you have finished booking all linked appointments select **Discard**:

2 appointment(s) created for the selected patient so far.

| | | |
|-------------------------|----------------------------|---------|
| Booking appointment for | FAIRFIELD, Patricia (Miss) | DISCARD |
| Registered at | INPS Leeds Test Practice | |
| with | Dr Susan Somerset | |
| Usual GP | Dr Unknown Unknown | |

A warning displays:

Linked appointments

You are in the process of linking a series of appointments but have discarded the patient, how would you like to proceed?

- Link the appointments you have already created.
- Don't link the appointments (the bookings will remain).
- Cancel the discard so you can continue linking appointments.

Complete as required:

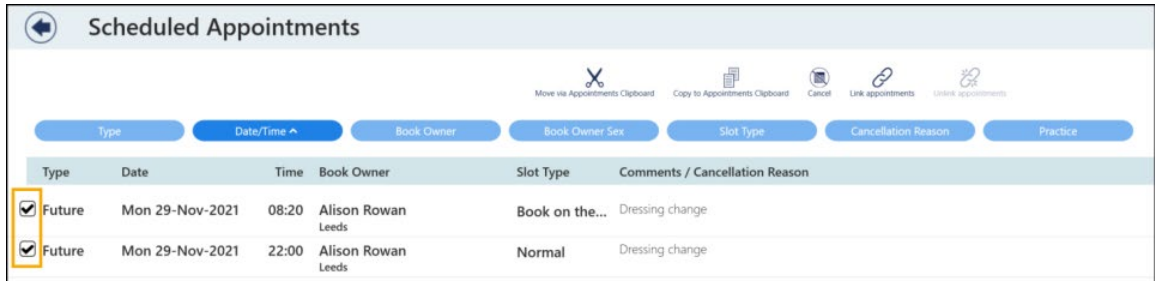
- Create Links** – Select to continue linking appointments for this patient.
- Don't create links** – Select to retain the appointments but not link them.
- Cancel** – Select to continue booking linked appointments.



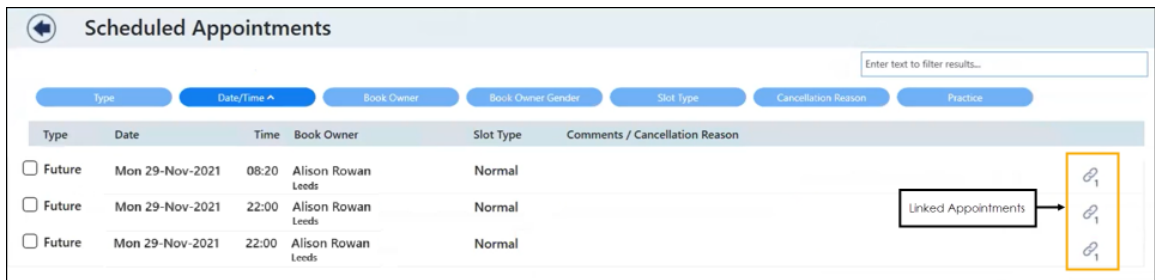
Linking Appointments from the Scheduled Appointments screen

To link existing appointments:

1. From the patient's **Scheduled Appointments** view, tick the appointments you want to link:



2. Select **Link appointments**  and the appointments are now linked:



Viewing a Set of Linked Appointments

Select **Link Appointments**  to view all the appointments in the link:

The **Patient linked appointments** screen displays:

| Patient linked appointments | | | | |
|-----------------------------|-------|---|-----------------|----------|
| Date | Time | Book Owner | Slot Type | Comments |
| Wed 20-Oct-2021 | 04:00 | Tom Proctor Shared Appointment Bo... | Normal | |
| Wed 20-Oct-2021 | 07:30 | Clinic Sunday Leeds | COVID VACS | |
| Wed 20-Oct-2021 | 10:00 | Dr Ailsa Unknown M... Leeds | Book on the Day | |
| Wed 20-Oct-2021 | 10:10 | Dr Ailsa Unknown M... Leeds | Book on the Day | |
| Wed 20-Oct-2021 | 10:40 | Dr Ailsa Unknown M... Leeds | Normal | |



Patients with Multiple Sets of Linked Appointments

A patient may have two or more sets of linked appointments. In this case, in the **Scheduled Appointments** view, you can see the two sets of linked appointments are identified with a different number indicating those that are linked:

| Type | Date | Time | Book Owner | Slot Type | Comments / Cancellation Reason |
|---------------------------------|-----------------|-------|-------------------------|----------------|--------------------------------|
| <input type="checkbox"/> Future | Mon 29-Nov-2021 | 08:20 | Alison Rowan Leeds | Book on the... | Dressing change |
| <input type="checkbox"/> Future | Mon 29-Nov-2021 | 22:00 | Alison Rowan Leeds | Normal | Dressing change |
| <input type="checkbox"/> Future | Thu 02-Dec-2021 | 09:20 | Chris Cheshire Leeds | Normal | Vaccination course - 1 |
| <input type="checkbox"/> Future | Thu 09-Dec-2021 | 09:10 | Chris Cheshire Leeds | Normal | Vaccination course - 2 |

Annotations: A box labeled "Set of linked appointments" points to the chain icon with '1' next to the first two rows. Another box labeled "A different set of linked appointments" points to the chain icon with '2' next to the last two rows.

Unlinking Appointments

To unlink an appointment:

1. From the patient's **Scheduled Appointments** view, select the appointment to unlink:

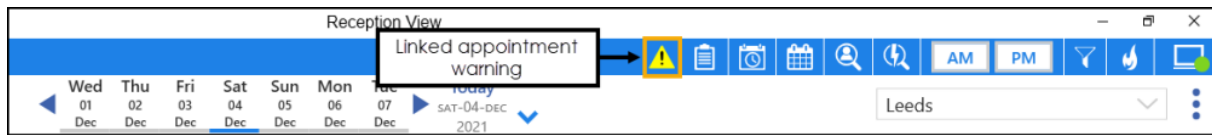
| Type | Date | Time | Book Owner | Slot Type | Comments / Cancellation Reason |
|--|-----------------|-------|---|------------|--------------------------------|
| <input type="checkbox"/> Future | Thu 21-Oct-2021 | 03:10 | Tom Proctor Shared Appointment Books | Normal | 1 |
| <input type="checkbox"/> Future | Thu 21-Oct-2021 | 09:10 | Clinic Sunday Leeds | COVID VACS | 2 |
| <input type="checkbox"/> Future | Thu 21-Oct-2021 | 10:40 | Dr Ailsa Unknown Memb... Leeds | Normal | 1 |
| <input checked="" type="checkbox"/> Future | Thu 21-Oct-2021 | 10:50 | Cloud Clinic Leeds | Normal | 2 |

2. Select **Unlink appointments** . The appointment is no longer linked to any other appointment.



Linked Appointments Warning

The **Linked appointment warning** displays on the toolbar:



-  - The **Linked appointment warning** is more prominent when an appointment is updated or cancelled.



See [Linked Appointments Warnings](#) on page **18** for more details.

-  - The **Linked appointment warning** is faded when there are no linked appointments warnings.



Linked Appointments Warnings

Linked appointment warnings display on the toolbar when a linked appointment is updated or cancelled:



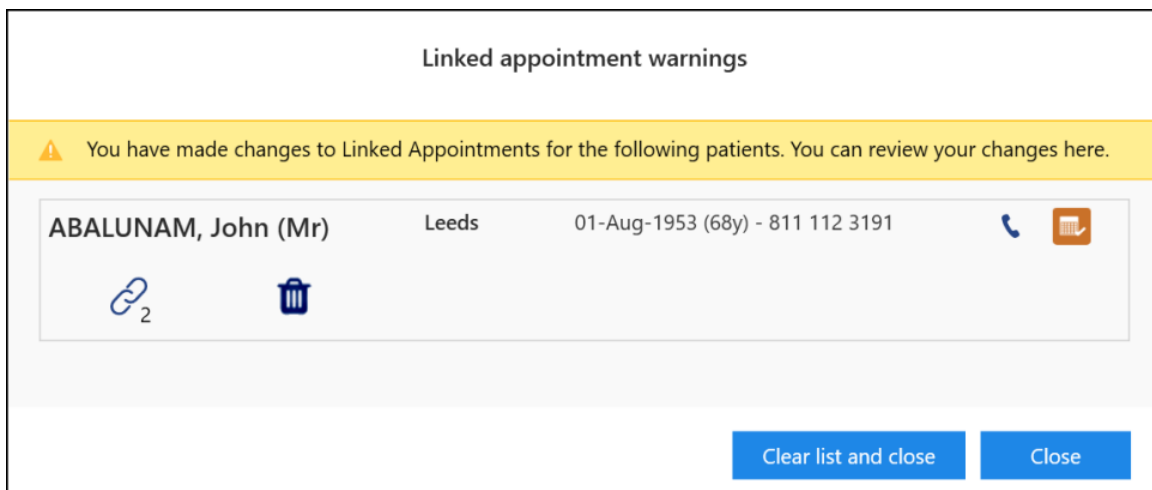
Note - This is only available if you access **Appointments** from your **Desktop**.

Viewing Linked Appointment Warnings

To view linked appointment warnings:

1. From the toolbar at the top of the screen select **Linked appointment**

warnings  and the **Linked appointments warnings** screen displays:



The following options are available:

- **Viewing the changes to a link** - Select **Link Appointments**  to view the changes to the linked appointments.

 See **Viewing Linked Appointment Changes** on page **19** for more details.

- Select **Delete**  to delete the link.
- Select **Scheduled**  to view the patients scheduled appointments.



2. Select either:

- **Clear list and close** - To clear the warnings and close the **Linked appointment warnings** screen, or
- **Close** - To close the **Linked appointment warnings** screen without clearing the warnings.

Viewing Linked Appointment Changes

To view the **Linked appointment changes** screen:

- From the Linked appointments warnings screen, select **Link Appointments**  the **Linked appointments changes** screen displays:

Linked appointments changes

| Before | After |
|---|----------------------------------|
| 21-Oct-2021 09:10 CLSUN Leeds | 21-Oct-2021 09:10 CLSUN Leeds |
| 21-Oct-2021 10:50 CLDC Leeds | 21-Oct-2021 10:50 CLDC Leeds |
| 21-Oct-2021 12:00 JETES Shared Appointment Books | |

[Close](#)

You can see on this example that the linked appointment (12:00pm on the 21st October) is cancelled, and no longer displays under **After**.

Examples of linked appointment changes:

Appointment cancelled

Linked appointments changes

| Before | After |
|---------------------------------|---------------------------------|
| 10-Jul-2021 09:00 AROW Leeds | 10-Jul-2021 09:00 AROW Leeds |
| 10-Jul-2021 09:10 AROW Leeds | |
| 10-Jul-2021 09:20 AROW Leeds | 10-Jul-2021 09:20 AROW Leeds |
| 10-Jul-2021 09:30 AROW Leeds | 10-Jul-2021 09:30 AROW Leeds |



Appointment moved to clipboard

| Linked appointments changes | |
|---------------------------------|---|
| Before | After |
| 10-Jul-2021 09:00 AROW Leeds | 10-Jul-2021 09:00 AROW Leeds |
| 10-Jul-2021 09:20 AROW Leeds | 10-Jul-2021 09:20 AROW Leeds  |
| 10-Jul-2021 09:30 AROW Leeds | 10-Jul-2021 09:30 AROW Leeds |

Appointment moved

| Linked appointments changes | |
|---------------------------------|---------------------------------|
| Before | After |
| 10-Jul-2021 09:30 AROW Leeds | |
| | 10-Jul-2021 10:00 AROW Leeds |




Viewing the Audit History of a Session

You can view the audit history of an existing session to see any changes made to it. Auditable updates include:

- Book Owner
- Start Date and Time
- Duration

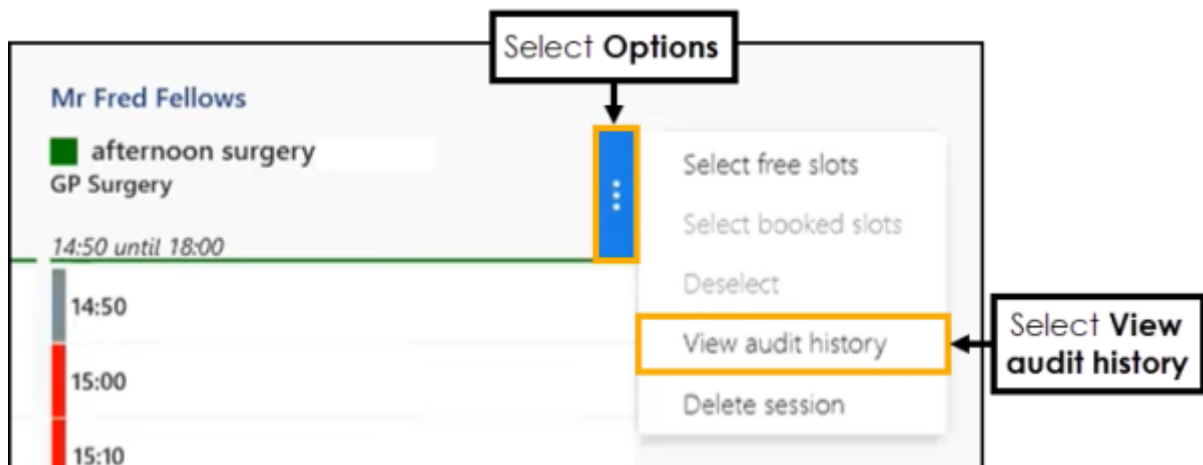
Each change is tracked by:

- Who was logged in when the change was made.
- Date and time.

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

To view the audit trail:

1. From the **Reception** and **Weekly** screens, hover over the session required, select **Options**  and then **View audit history**:



The **Session Audit History** screen displays.



Session Audit History Summary

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

| Session Audit History | | | |
|---|--|------------|-------------------|
| Audit History - Session afternoon surgery | | | |
| | Changed on | Changed by | Change summary |
| | <input type="checkbox"/> Thu 21-Oct-2021 11:51 | D DEWAR | Changed starts at |
| | <input type="checkbox"/> Thu 21-Oct-2021 11:48 | F FELLOWS | Session created |

- Select **Expand** on an item to display more information, or
- Select **Expand** on the column header to display all:

| Session Audit History | | | | | | | | | | | |
|---|--------------------------|-----------------------|-------------------|------------|---------|-----------|------------------|-----------------|--------------------------|-----------------------|--|
| Audit History - Session afternoon surgery | | | | | | | | | | | |
| | Changed on | Changed by | Change summary | | | | | | | | |
| <input checked="" type="checkbox"/> | Thu 21-Oct-2021 11:51 | D DEWAR | Changed starts at | | | | | | | | |
| <table border="1"> <thead> <tr> <th>Book owner</th> <th>Session</th> <th>Starts at</th> <th>Planned duration</th> </tr> </thead> <tbody> <tr> <td>Mr Fred Fellows</td> <td>afternoon surgery-Rename</td> <td>Thu 21-Oct-2021 14:50</td> <td></td> </tr> </tbody> </table> | | | | Book owner | Session | Starts at | Planned duration | Mr Fred Fellows | afternoon surgery-Rename | Thu 21-Oct-2021 14:50 | |
| Book owner | Session | Starts at | Planned duration | | | | | | | | |
| Mr Fred Fellows | afternoon surgery-Rename | Thu 21-Oct-2021 14:50 | | | | | | | | | |
| <input checked="" type="checkbox"/> | Thu 21-Oct-2021 11:48 | F FELLOWS | Session created | | | | | | | | |
| <table border="1"> <thead> <tr> <th>Book owner</th> <th>Session</th> <th>Starts at</th> <th>Planned duration</th> </tr> </thead> <tbody> <tr> <td>Mr Fred Fellows</td> <td>afternoon surgery-Rename</td> <td>Thu 21-Oct-2021 15:00</td> <td></td> </tr> </tbody> </table> | | | | Book owner | Session | Starts at | Planned duration | Mr Fred Fellows | afternoon surgery-Rename | Thu 21-Oct-2021 15:00 | |
| Book owner | Session | Starts at | Planned duration | | | | | | | | |
| Mr Fred Fellows | afternoon surgery-Rename | Thu 21-Oct-2021 15:00 | | | | | | | | | |



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 specific slot updates side by side.

To compare two updates:

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

Session Audit History
Audit History - Session afternoon surgery-Rename for Mr Fred Fellows

| Changed on | Changed by | Change summary |
|---|------------|-------------------|
| <input checked="" type="checkbox"/> Thu 21-Oct-2021 11:51 | D DEWAR | Changed starts at |
| <input checked="" type="checkbox"/> Thu 21-Oct-2021 11:48 | F FELLOWS | Session created |

Tick to select individual items to compare

Select Compare

Compare Close

2. The **Session Audit History** comparison screen displays the two updates side by side:

Session Audit History
Session afternoon surgery

| Item | Value at Thu 21-Oct-2021 11:48:11 | Value at Thu 21-Oct-2021 11:51:02 |
|------------------|-----------------------------------|-----------------------------------|
| Book owner | Mr Fred Fellows | Mr Fred Fellows |
| Session | afternoon surgery-Rename | afternoon surgery-Rename |
| Starts at | Thu 21-Oct-2021 15:00 | Thu 21-Oct-2021 14:50 |
| Planned duration | | |

Session information: → Session afternoon surgery

History item list →

Two selected history items for comparison

Back to list

Note - Changes display in blue.


Session Audit History
Session AM Surgery Dundee for Dr Shirley Anderson

| Item | Value at Mon 18-Oct-2021 14:52:54 | Value at Mon 25-Oct-2021 07:55:35 |
|------------------|-----------------------------------|-----------------------------------|
| Book owner | Dr Shirley Anderson | Dr Shirley Anderson |
| Session | AM Surgery Dundee | AM Surgery Dundee |
| Starts at | Tue 26-Oct-2021 08:00 | Tue 26-Oct-2021 07:50 |
| Planned duration | | |

Select **Back to list** to return to the **Session Audit History** screen.

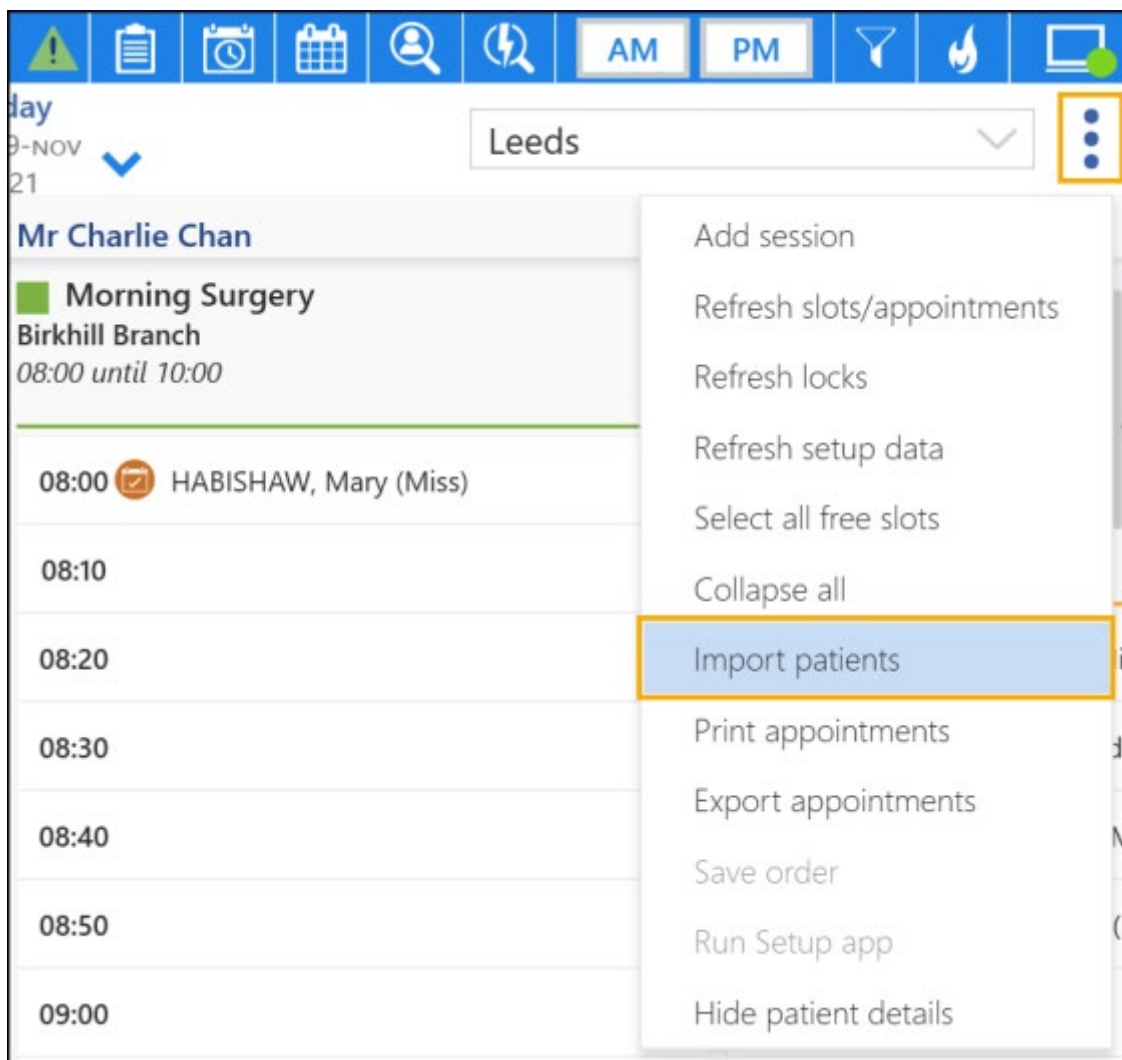


Import to Appointments Clipboard

 **Note** - This is only available if you access **Appointments** from your **Desktop**.

To import a CSV (Microsoft Excel) file, for example a list of patients due to be vaccinated, to the **Appointments Clipboard**:

1. From the **Reception View**, select **Options** 



2. Select **Import patients**.
3. The **Open** screen displays, navigate to the **CSV** file required.
4. Highlight the **CSV** file required and select **Open**.



5. The **Import** screen displays:

Does the file contain a header row?

NHS/CHI number column*: Date of birth column*:

Import all rows?

| Row number | AppointmentDateTi | Forename | NhsNumber | Surname | Dob | dob 2 |
|------------|-------------------|-----------|------------|----------|------------------|--------|
| 1 | 14/10/2021 08:00 | Phillip | 8111143354 | DEAN | 01/08/1953 00:00 | 01/08/ |
| 2 | 14/10/2021 09:00 | Olive | 8111144164 | FIELDING | 01/08/1985 00:00 | 01/08/ |
| 3 | 14/10/2021 08:50 | David | 8111138008 | SAVVA | 01/08/1989 00:00 | 01/08/ |
| 4 | 14/10/2021 09:20 | Katharine | 8111158602 | JAMES | 01/08/1959 00:00 | 01/08/ |
| 5 | 14/10/2021 09:10 | Noeline | 8111144946 | FITT | 01/08/1996 00:00 | 01/08/ |
| 6 | 14/10/2021 08:20 | Kathleen | 8111144725 | JACKSON | 01/08/1953 00:00 | |
| 7 | 14/10/2021 08:10 | Jordaine | 8111142110 | KEANE | 01/08/1937 00:00 | |
| 8 | 14/10/2021 08:40 | Trevor | 8111132662 | BARRY | 01/08/1998 00:00 | |

Complete as required:

- **Does the file contain a header row?** - Tick if the file contains a header row, remove the tick if there is no header row in the **CSV** file.
- **NHS/CHI number column** - Select the header row title or the column identifier that contains the NHS/CHI number data (mandatory) from the available list.
- **Date of birth column** - Select the header row title or the column identifier that contains the Date of birth data (mandatory) from the available list.
- **Import all rows?** - Tick to import all rows or remove the tick to select individual rows:
 - **Import from row** - Select the first line number to import.
 - **To row** - Select the last line number to import.

6. Select **Proceed**

The system checks all patients, should an error occur when reading the file the **File Errors** screen displays.



- 7. Select **Copy Errors to Windows Clipboard** to copy the file errors to the windows clipboard:

File Errors

There was an error when reading the file - the contents were not as expected.
Please report this problem to the author of the file as advised when the file was passed to you.
Details of the issues will appear below and can be copied to the clipboard in order to pass this information on.

Line number 2 contains the following errors:
Invalid Date Of Birth value

Line number 3 contains the following errors:
Invalid Date Of Birth value

Proceed Copy Errors to Windows Clipboard Cancel

- 8. If no errors occur the **Search results** screen displays:

| Search results | | | | |
|----------------|---------------|------------------|---------------------|----------------------|
| NHS/CHI number | Date of birth | Importing status | Registered practice | Patient name |
| 8111120362 | 08/01/1944 | Success | Leeds | SMITH, Colin (Mr) |
| 8111146264 | 08/01/1975 | Success | Leeds | KING, John (Mr) |
| 8111137591 | 08/01/1992 | Success | Leeds | BUTLER, Sarra (Miss) |
| 7120266187 | 01/01/1943 | NotFound | | |
| 7120268902 | 01/01/1965 | NotFound | | |
| 7120272373 | 01/01/1950 | NotFound | | |
| 5693680914 | 13/07/1993 | NotFound | | |
| 5147693694 | 02/06/1999 | NotFound | | |
| 1077806013 | 19/01/1987 | NotFound | | |
| 1765867190 | 17/06/1945 | NotFound | | |

Import successful ← (points to KING, John (Mr))

Patient not found or unavailable ← (points to 5693680914)



Training Tip - A federated user can import and view patients from various practices however if a practice user views the list, they can only see the patient's from their own practice, all others display as **NotFound**.

- 9. Select **Add patient to Appointments clipboard**

Add patients to Appointments clipboard

to add all successfully imported patients to the **Appointments Clipboard**.

- 10. You can now book patients into free appointment slots as required.



Important - When patients are booked from the imported list they remain on the list.



11. Book an additional appointment if required or select **Delete**  to remove the patient from the **Appointments Clipboard** or select **Clear All** to remove all patients from the list.




Training Tip - If you log out while there are imported patients on the **Appointments Clipboard** the patients remain until deleted.



Preferences - Backup

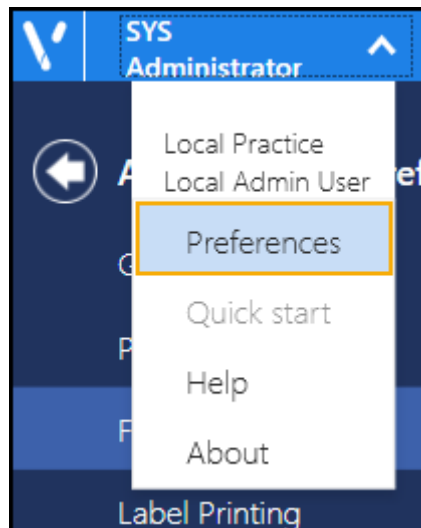
You can set an automatic backup from **Appointments**. Backup options are user specific regardless of role.

 **Note** - The backup only occurs when the machine is switched on and can be run on multiple machines.

 **Note** - The export file contents are based on the sharing agreements for each user.

To set your backup options:

1. From **Appointments**, select the arrow next to your name and select **Preferences**:



2. Select **Backup** and complete as required:

Backup Appointments

Folder name

Backup file type PDF CSV

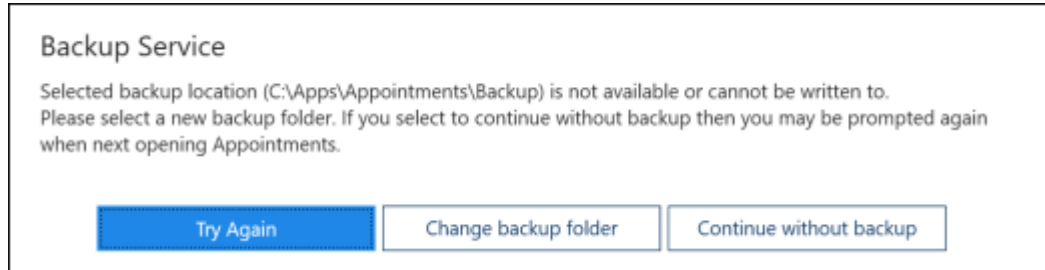
Take a backup every

Show Comments

- **Folder name** - Set the backup folder location (either local or mapped drive), select **Choose Folder** to locate the folder or **Clear** to clear the current location.

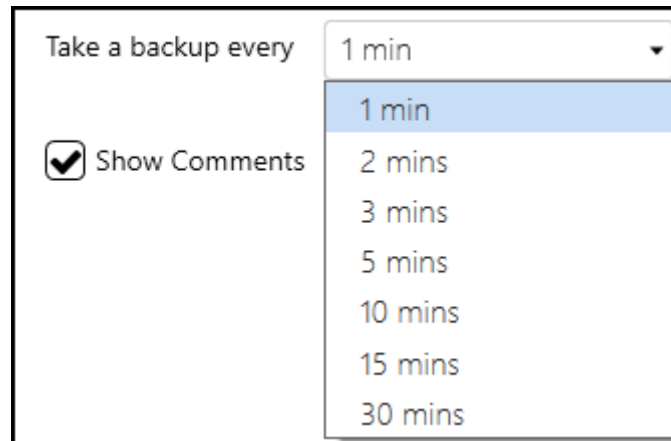


If a drive is no longer available an error message displays 'Selected backup location (file_location) is not available or cannot be written to. Please select a new backup folder. If you select to continue without backup then you may be prompted again when next opening Appointments.'



Select either:

- **Try Again** - Select to try again.
- **Change backup folder** - Select to open the **Browse for Folder** screen to select a new folder, your backup preferences will be updated with the new folder selected.
- **Continue without backup** - Select to continue without a backup. Until a backup is set, you are prompted each time you log into **Appointments**.
- **Backup file type** - Choose whether to output the backup as a PDF (printable) or a CSV (Microsoft Excel) file.
- **Take a backup every** - Select the backup schedule in minutes from the available list:



- **Show Comments** - Tick to show any appointment comments in the output (recommended).