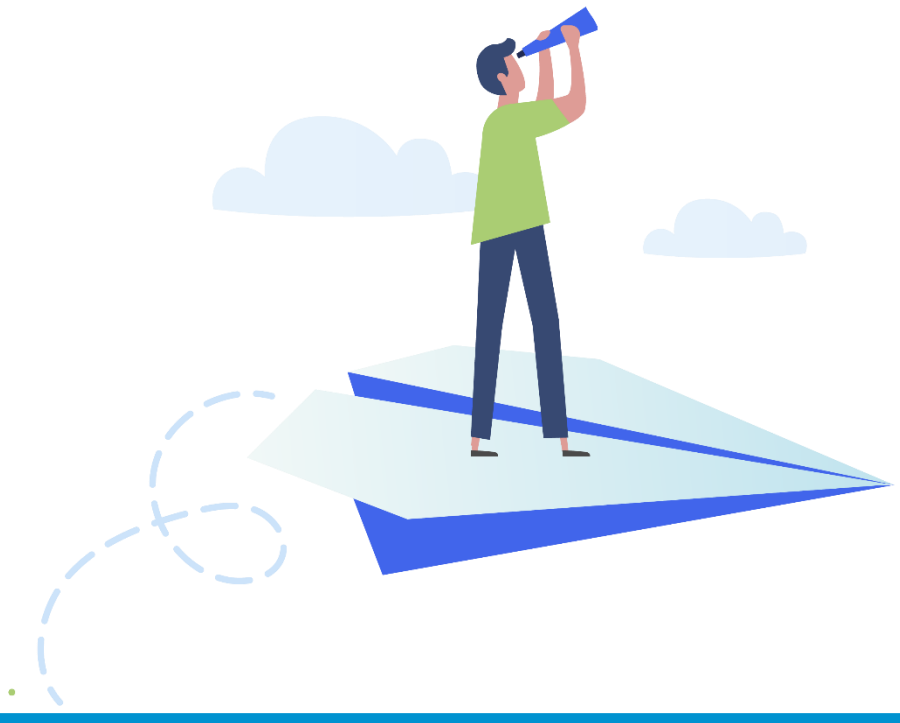
Appointments

Appointments Release 3.4

Version 1.2

11 January 2024



cegedim Healthcare Solutions

Copyright © 2024 Cegedim Healthcare Solutions

All Rights Reserved

Cegedim Healthcare Solutions is the trading name of Cegedim Rx Ltd and In Practice Systems Limited.

No part of this document may be photocopied, reproduced, stored in a retrieval system or transmitted in any form or by any means, whether electronic, mechanical, or otherwise, without the prior written permission of Cegedim Healthcare Solutions.

No warranty of accuracy is given concerning the contents of the information contained in this publication. To the extent permitted by law, no liability (including liability to any person by reason of negligence) will be accepted by Cegedim Healthcare Solutions, its subsidiaries or employees for any direct or indirect loss or damage caused by omissions from or inaccuracies in this document.

Cegedim Healthcare Solutions reserves the right to change without notice the contents of this publication and the software to which it relates.

Product and company names herein may be the trademarks of their respective owners.

Registered name: Cegedim Rx Ltd. Registered number: 02855109
Registered name: In Practice Systems Limited. Registered number: 01788577
Registered address: Studio F5 Battersea Studios 1, 82 Silverthorne Road, London SW8 3HE

Website: https://www.cegedim-healthcare.co.uk/

Contents

Appointments Release 3.4 4

All Users 4

Practice Only Users 10

Desktop Only Users 11

Recording DNA Clinical Codes from Appointments 14

Bulk Updating Incomplete Appointments 19

Bulk Updating Online Availability 22

Show Today's Free Slots 26

Appointments Restrictions 28

National Patient Search - England Only 31

Appointments Release 3.4

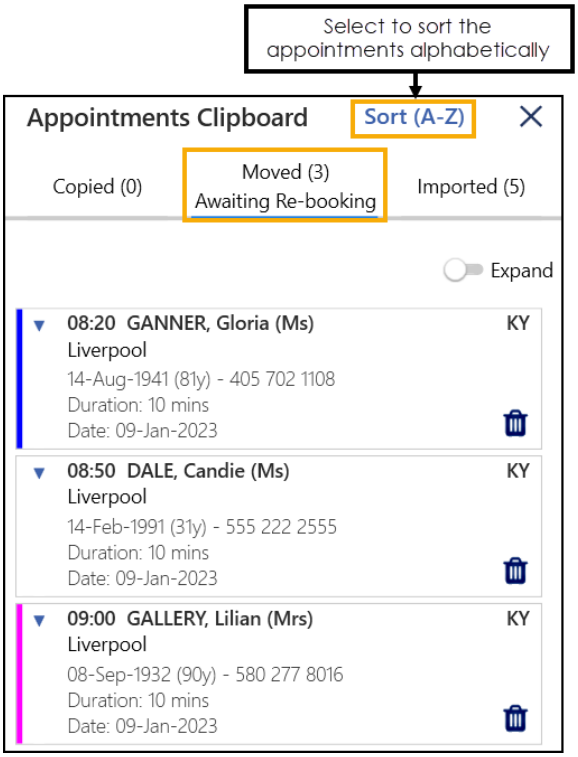
Appointments release **3.4** contains the following new features and improvements:

Note - This is the first release since **Appointments** release **3.2**.

Important - For full functionality **Vision 3** users must be on **DLM 860**, see Checking your Current DLM Version in the Vision 3 Front screen Help Centre for details.

All Users

- **Appointments Clipboard** - The following improvements have been made to the **Appointments Clipboard**:
  - Appointments can now be copied and added to the **Appointments Clipboard** without replacing the previously copied appointments in the **Copied** tab.
  - An improved **Appointments Clipboard** now displays in orange when it contains copied, moved or imported appointments.
  - You can now sort appointments alphabetically in the **Moved Awaiting Re-booking** and **Imported** tabs:



- **Adding a DNA Clinical Code to the Patient Record** (This feature is dependent on **Vision 3** release **DLM 860**) - You can now record a Did Not Attend (DNA) clinical code on a patient's record directly from **Appointments** when a patient fails to attend an appointment. A DNA clinical code can be added to patient's records individually from a single appointment or in bulk searching for multiple appointments using a date range.

See **Recording DNA Clinical Codes from Appointments** on page **14** for more information.

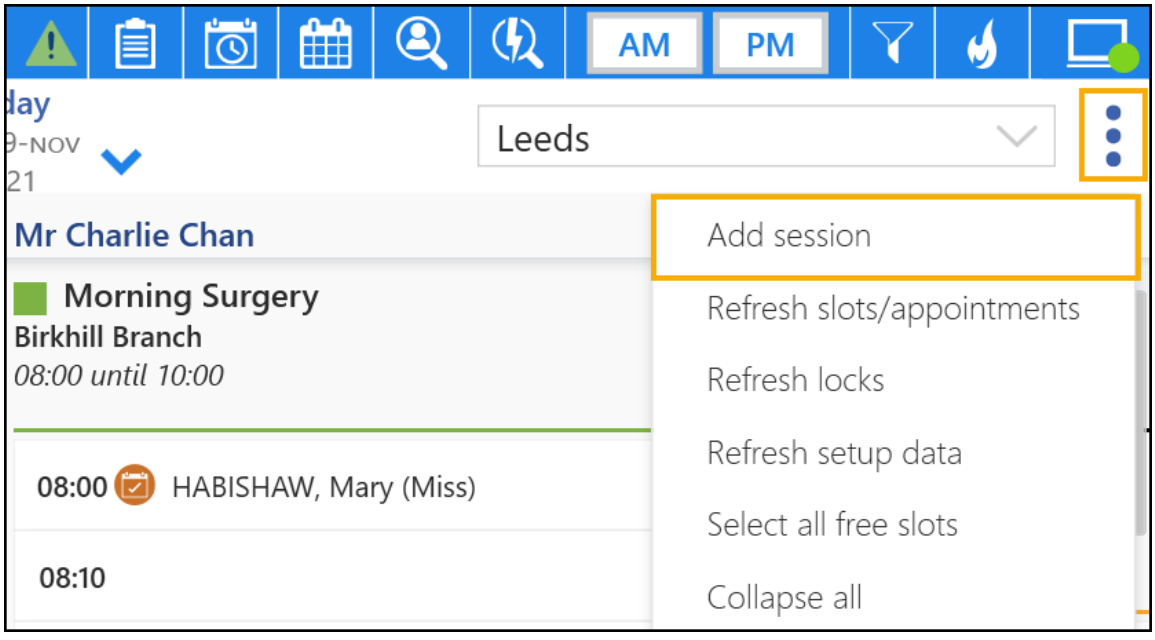
- **Updating Web Availability** (This feature is dependent on **Vision 3** release **DLM 860**) - You can now bulk update free appointment slots to make them available or unavailable for your patients to book online.

See **Bulk Updating Online Availability** on page **22** for more information.

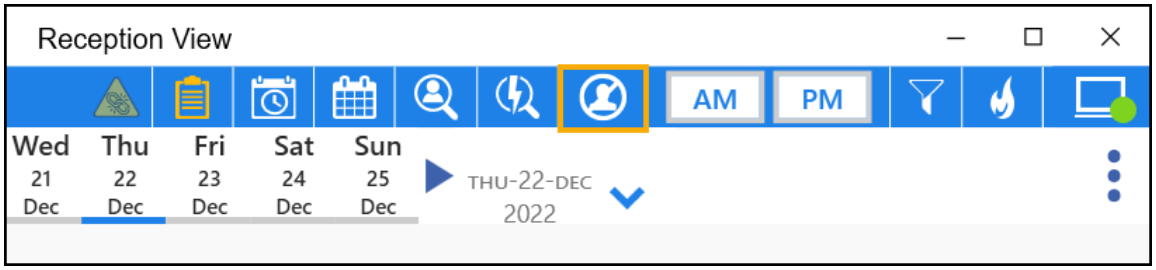
- **Updating Incomplete Appointments** (This feature is dependent on **Vision 3** release **DLM 860**) - You can now bulk update the status of incomplete appointments from the past seven days. Appointments left with an incomplete status of **Arrived**, **In consultation** or **DNA** can be changed to a different status.

See **Bulk Updating Incomplete Appointments** on page **19** for more information.

- **Adding Sessions** (This feature is dependent on **Vision 3** release **DLM 860**) - You can now add ad-hoc sessions to your Appointment Books up to a maximum of seven days in the past:



- **Show Today's Free Slots** - You can now select **Show today's free slots** from the **Reception View** toolbar to quickly display appointment slots available to book for today:

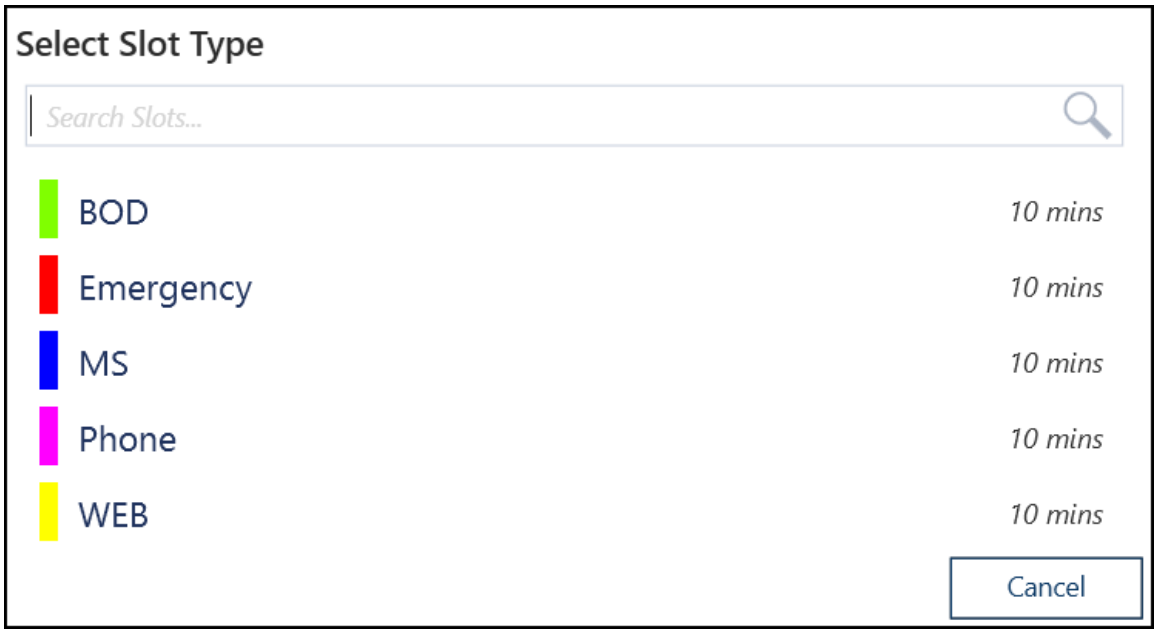


See **Show Today's Free Slots** on page **26** for more information.

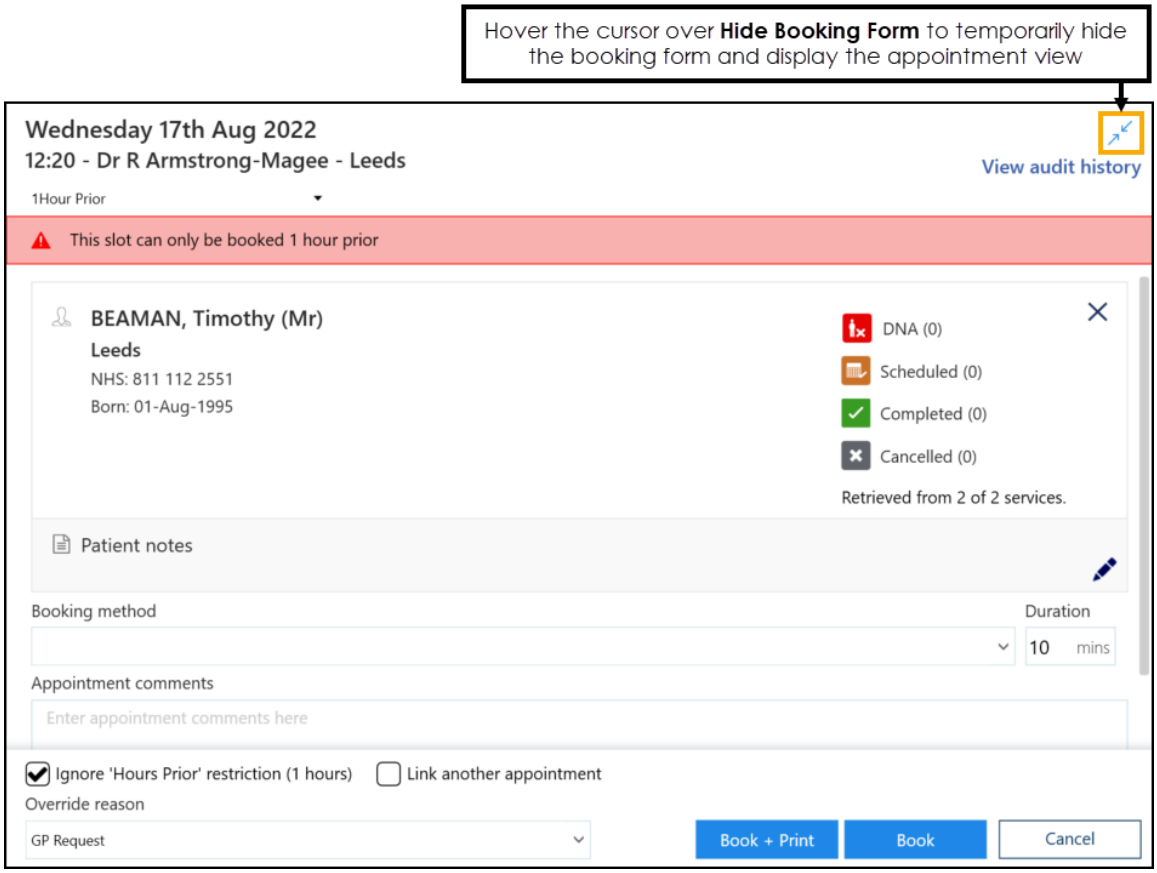
- **Appointment Override reasons** - When booking an appointment in a slot with a **Days/Hours Prior** restriction, you must now select a pre-defined **Override reason**.

See **Appointments Restrictions** on page **28** for more information.

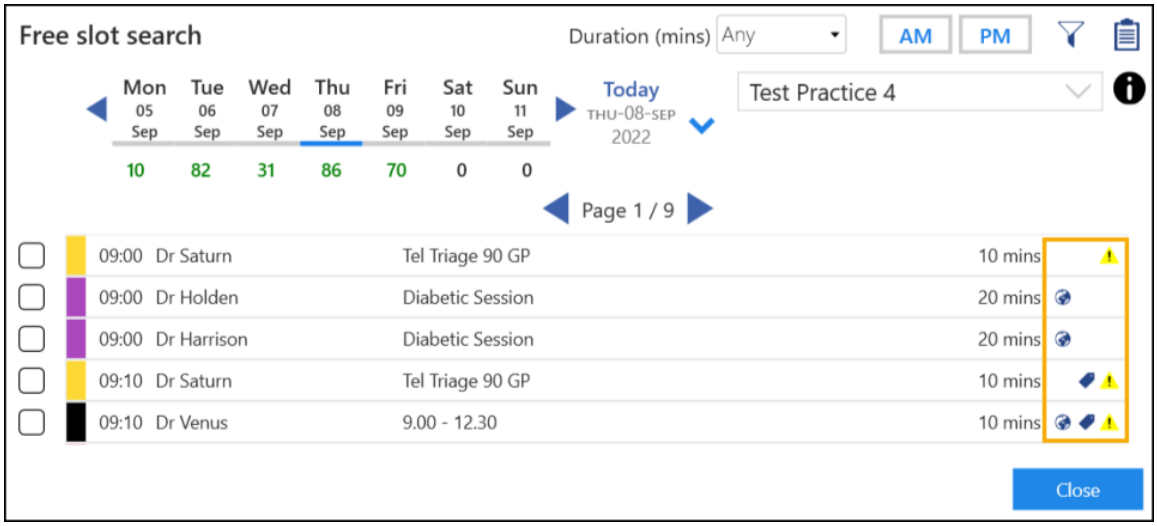
- **Changing Slot Types** - A **Select Slot Type** screen now displays when changing slot types, allowing you to quickly and easily find the slot type you want:



- **Temporarily Hide the Booking Form** – A new **Hide Booking Form** option allows you to temporarily hide the booking form. Hover the mouse cursor over it to display the main appointment view behind, moving the mouse again re-displays the booking form. This is useful if you don't want to cancel the booking form, but need to check slot availability, for example, to book a different slot time:



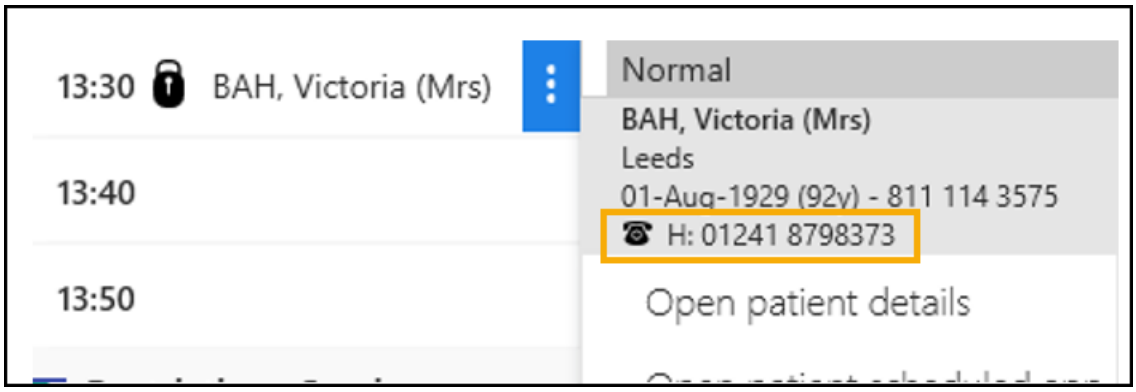
- **Free Slot Search** - Appointment type symbols now display beside appointment slots on the **Free slot search** screen to help you easily identify types of appointments:



Hover over the symbol to display the description:

- - Available for Web Bookings.
- - A local rule/restriction exists for this slot.
- - Tagged for **GP Connect** (England only).

- **Telephone Number Display** - The appointment slot context menu now displays the patient's telephone number in the following order of availability:

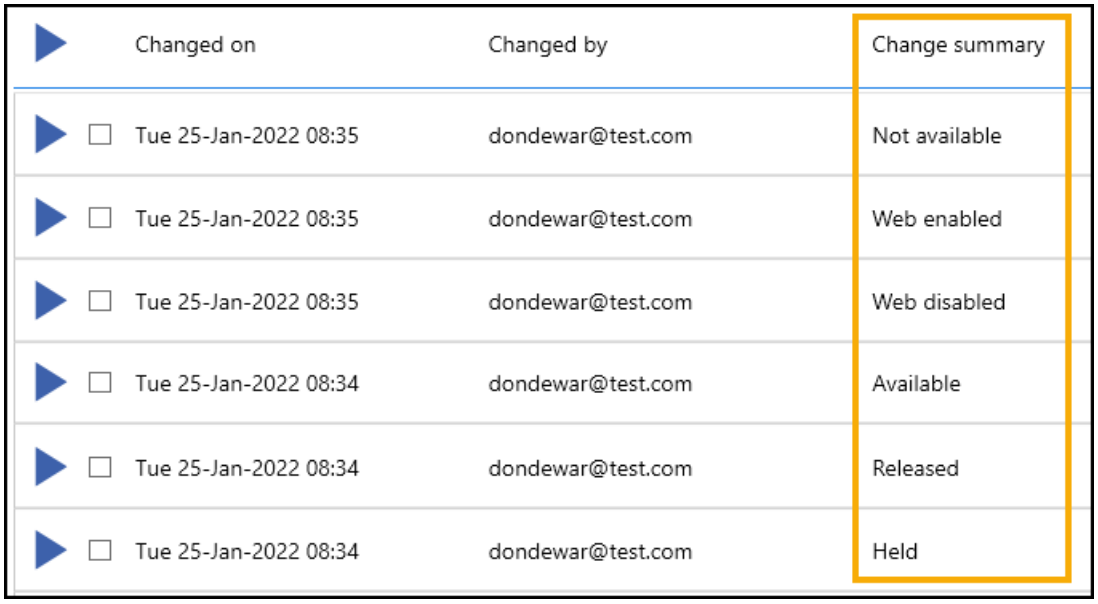


1. **Mobile number (M)**

> **Note** - When a patient has more than one mobile number, the most recently recorded number displays.

2. **Home number (H)**
3. **Work number (W)**

- **Appointment Slot Audit History** - The following improvements have been made to the **Change summary** column on the **Slot Audit History** screen:

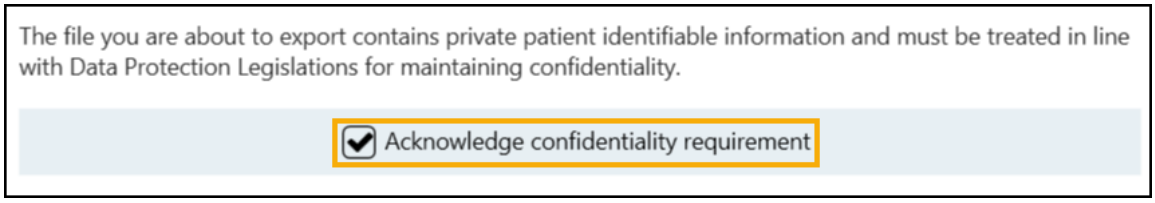


Changed on	Changed by	Change summary
Tue 25-Jan-2022 08:35	dondewar@test.com	Not available
Tue 25-Jan-2022 08:35	dondewar@test.com	Web enabled
Tue 25-Jan-2022 08:35	dondewar@test.com	Web disabled
Tue 25-Jan-2022 08:34	dondewar@test.com	Available
Tue 25-Jan-2022 08:34	dondewar@test.com	Released
Tue 25-Jan-2022 08:34	dondewar@test.com	Held

  - **Changed Held by** is reworded to **Held** or **Released**.
  - **Changed is web** is reworded to **Web enabled** or **Web disabled**.
  - **Changed is available** is reworded to **Available** or **Not available**.

- **Preferences** - A **Save**

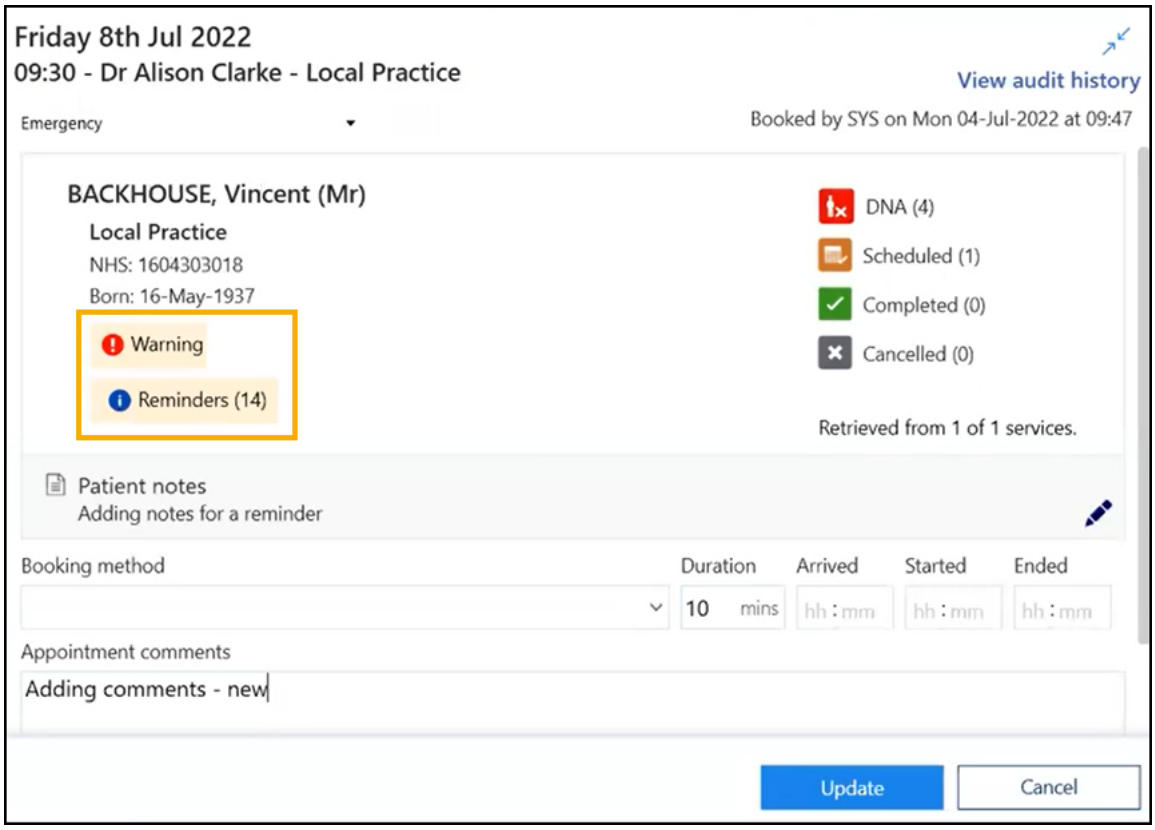
option is now available from all of the **Preferences** screens for clarity. Previously any changes made were saved when selecting the back arrow .
- **Patient Contact Details** (This feature is dependent on **Vision 3** release **DLM 850**) - The following new contact types are available to select from the **Patient Contact Details** screen:
  - **Relative**
  - **Carer**
  - **Ex-directory**
  - **Work Email**
  - **2nd Home**
  - **2nd Email**
  - **Temp Phone**
- **Exporting Appointments** - You must now confirm that you agree to the confidentiality requirement before you can export your appointments data:



Practice Only Users

Note - Only available if you access **Appointments** from within **Vision 3**.

- **Patient Warnings and Reminders** (This feature is dependent on **Vision 3** release **DLM 860**) - **Patient Warnings** and **Patient Reminders** now display on the **Booking Form** and on the **Patient Banner**:



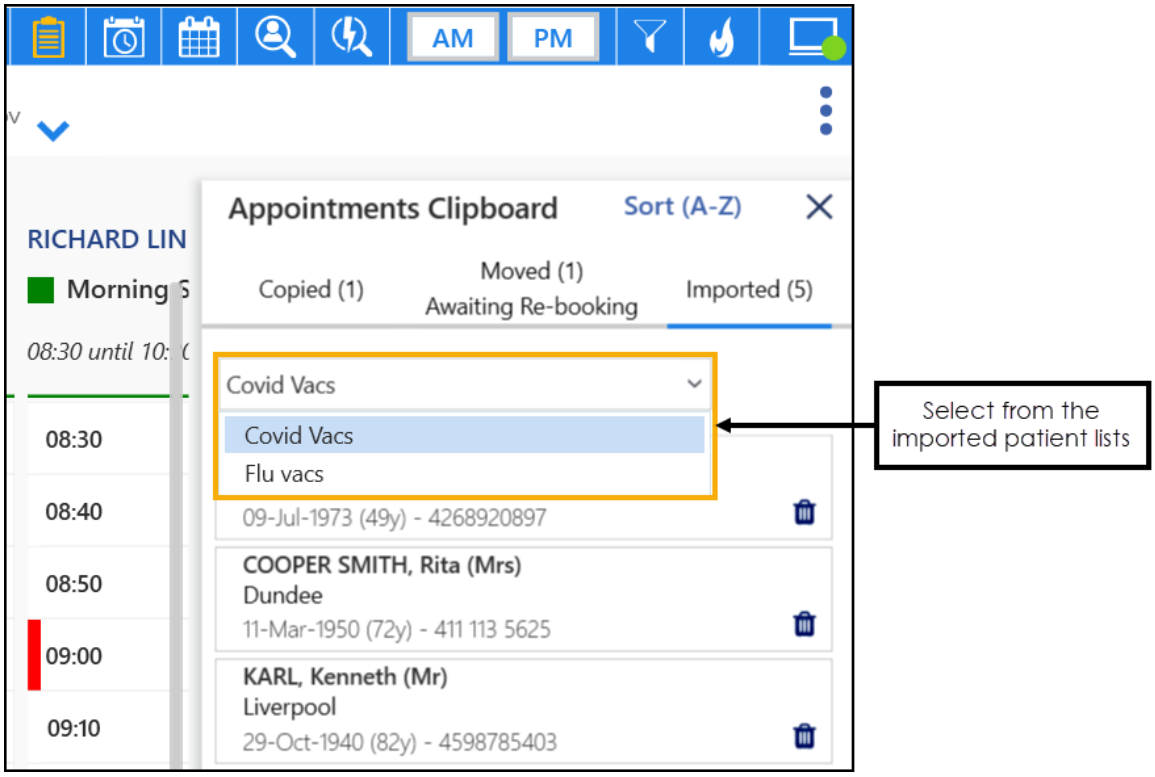
- **Online Registration** - **ONLINE REGISTRATION** ONLINE REGISTRATION now displays on the booking form if a patient is not registered for **Online Services**. Select **ONLINE REGISTRATION** ONLINE REGISTRATION to register the patient for **Online Services** in **Vision 3**.

Important - This is only available if you have **Vision 3** running on your workstation and you have access rights to **Registration** for registration records in **Vision 3**. See Adding and removing users and groups from **Vision** functions in the **Management Tools Help Centre** for more details.

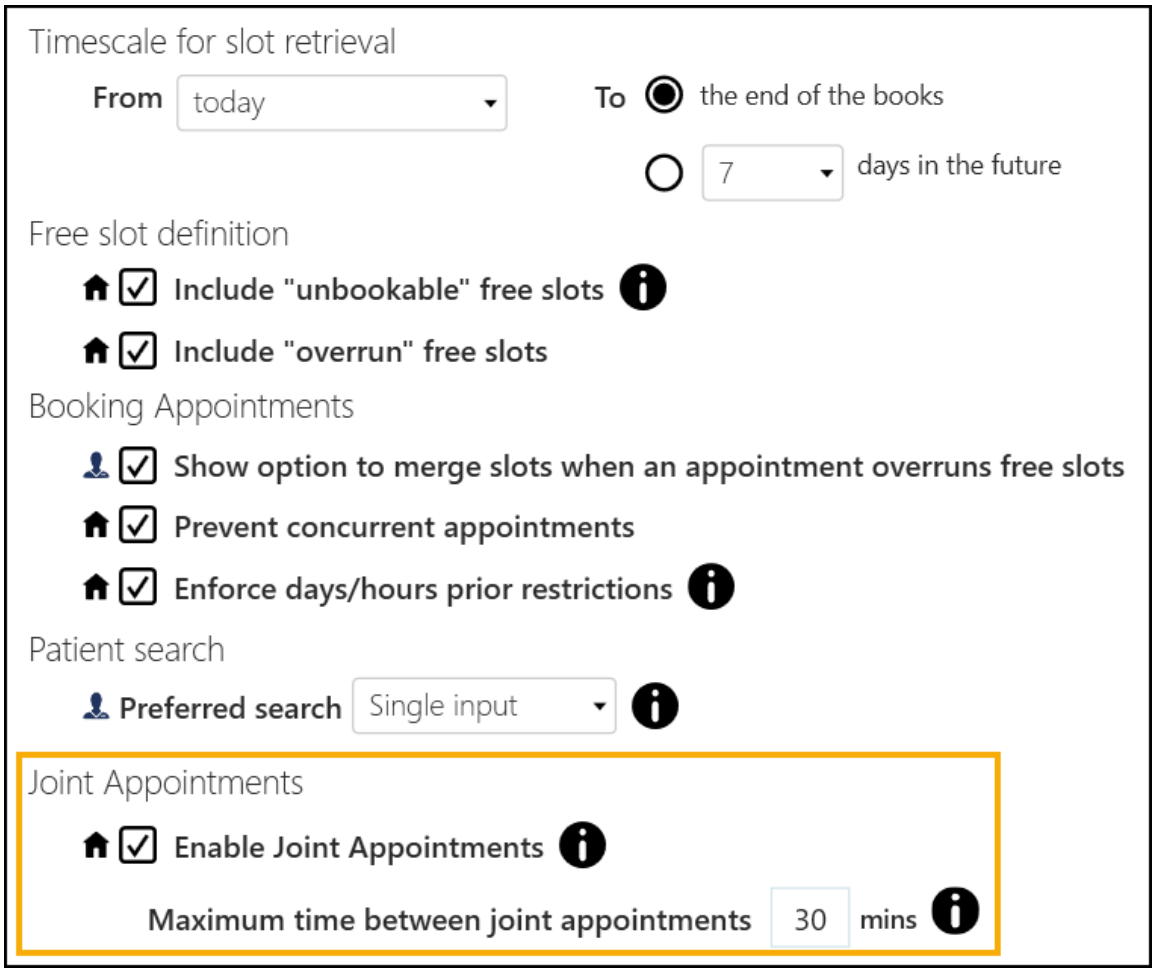
Desktop Only Users

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

- **Importing patients to the Appointments Clipboard** - You can now import multiple patient lists, or add patients to an existing patient list in the **Appointments Clipboard** without replacing previously imported patients in the **Imported** tab:



- **Preferences - General** - Contains the following new option:



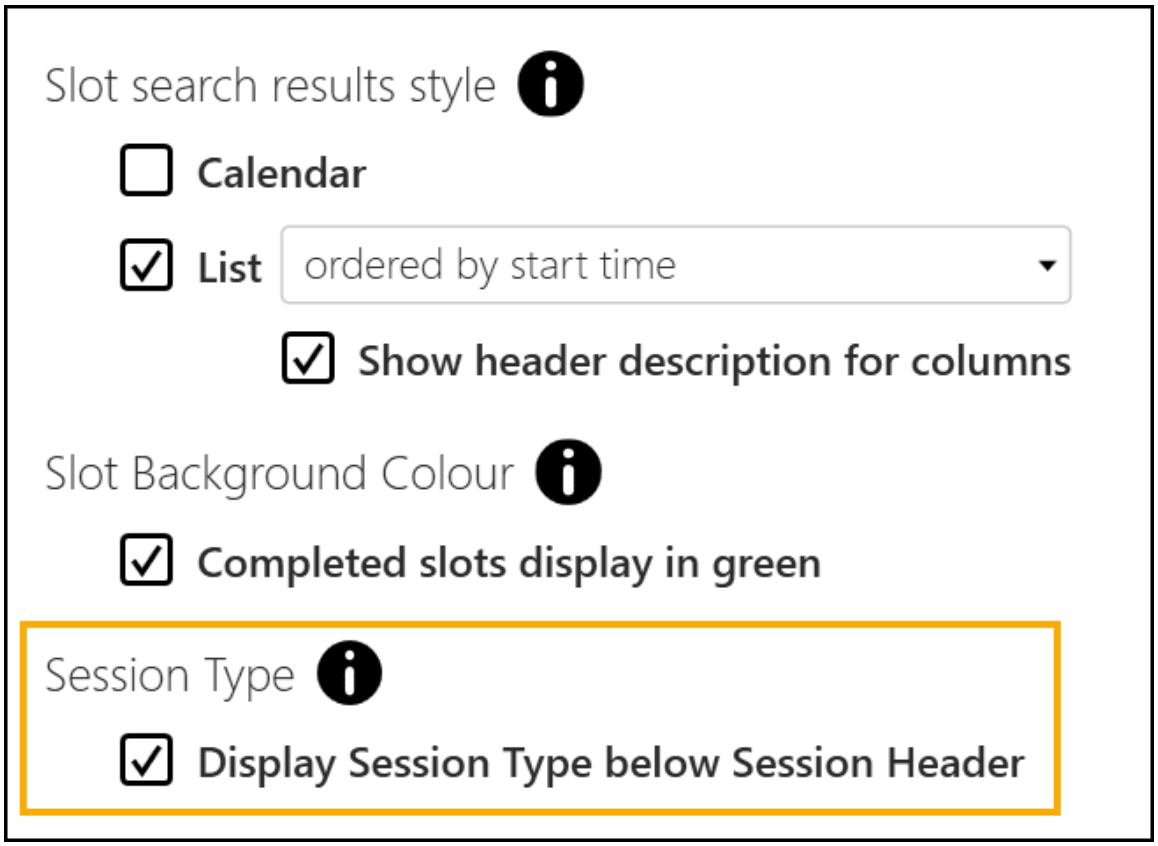
  - **Enable Joint Appointments**: You can now book concurrent and non-concurrent joint appointments within a specified time frame with one or more clinicians. When a joint appointment status changes the status updates accordingly for all the joint appointments in the set.
  - **Maximum time between joint appointments**: When you enable joint appointments, you can specify the maximum time between booking multiple slots for them to be considered as joint appointments. Appointments that are not within this time frame are not considered as joined.

See Preferences - General, and Joint Appointments Quick Reference Guide for more information.

- **Patient Search** (England only) - You can now perform a **National Patient Search** to include patients from **SystmOne (TPP)** practices in the search results. The **National Patient Search** facility allows you to find and book appointments for **SystmOne (TPP)** registered patients that you have a sharing agreement in place for.

See **National Patient Search - England Only** on page **31** for more details.

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



- **Linked Appointments Warnings** - An improved **Linked appointment warning** displays and flashes for 10 seconds when changes are made to linked appointments.

See Appointments Setup Release 3.4 for details about what is new in **Appointments Setup**.

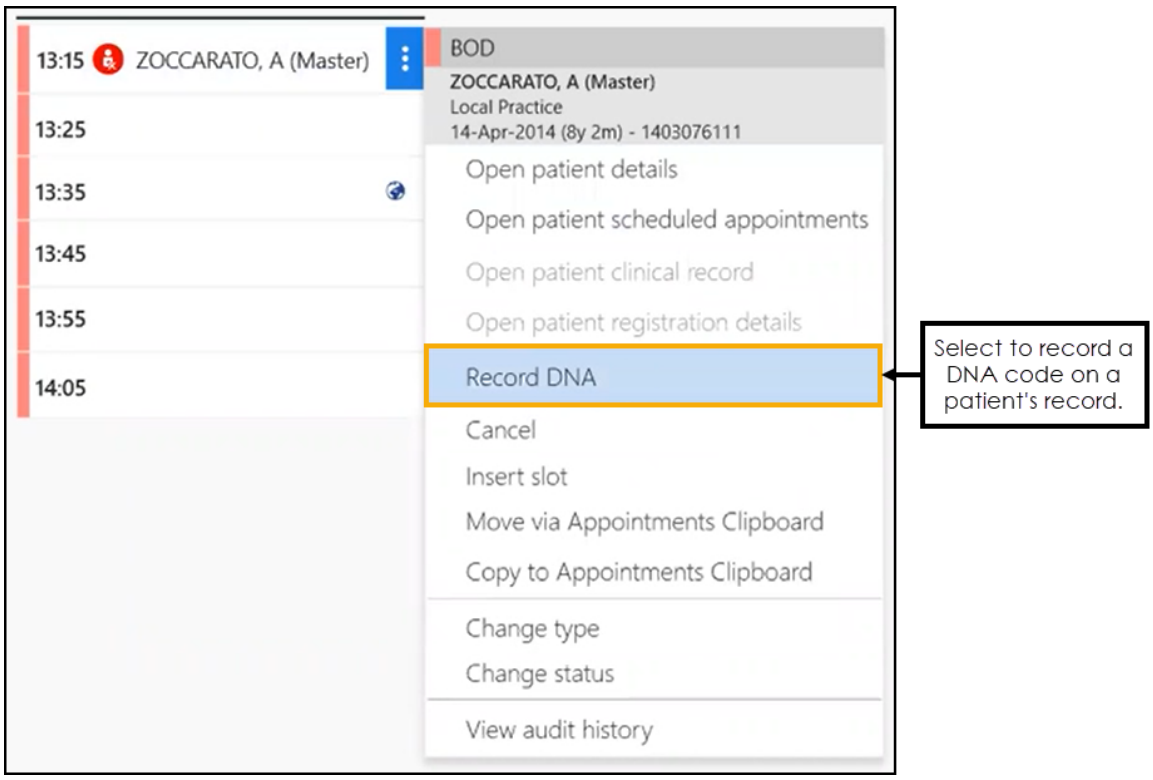
Recording DNA Clinical Codes from Appointments

You can add a Did Not Attend (DNA) clinical code to the patient's record when a patient fails to attend an appointment.

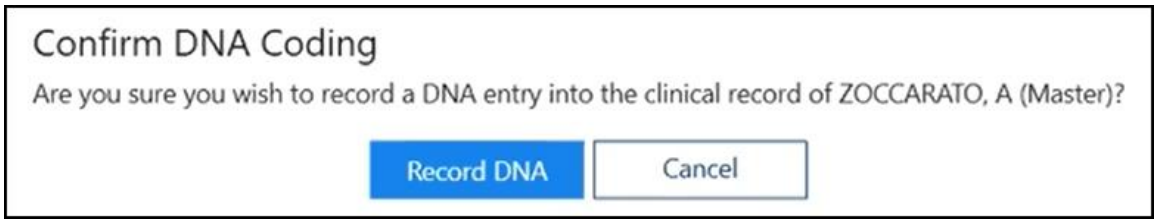
Recording a DNA Clinical Code for a Single Patient

To record a DNA clinical code on a single patient's record:

1. From the **Reception View** or **Weekly View**, hover over an appointment with a **DNA** status and select **Options**.
2. Select **Record DNA** from the available list:



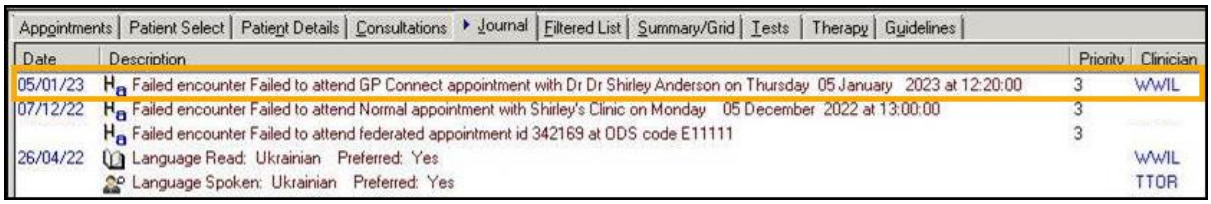
3. A **Confirm DNA Coding** message displays:



Select **Record DNA** to confirm.

A message confirming the clinical entry displays:

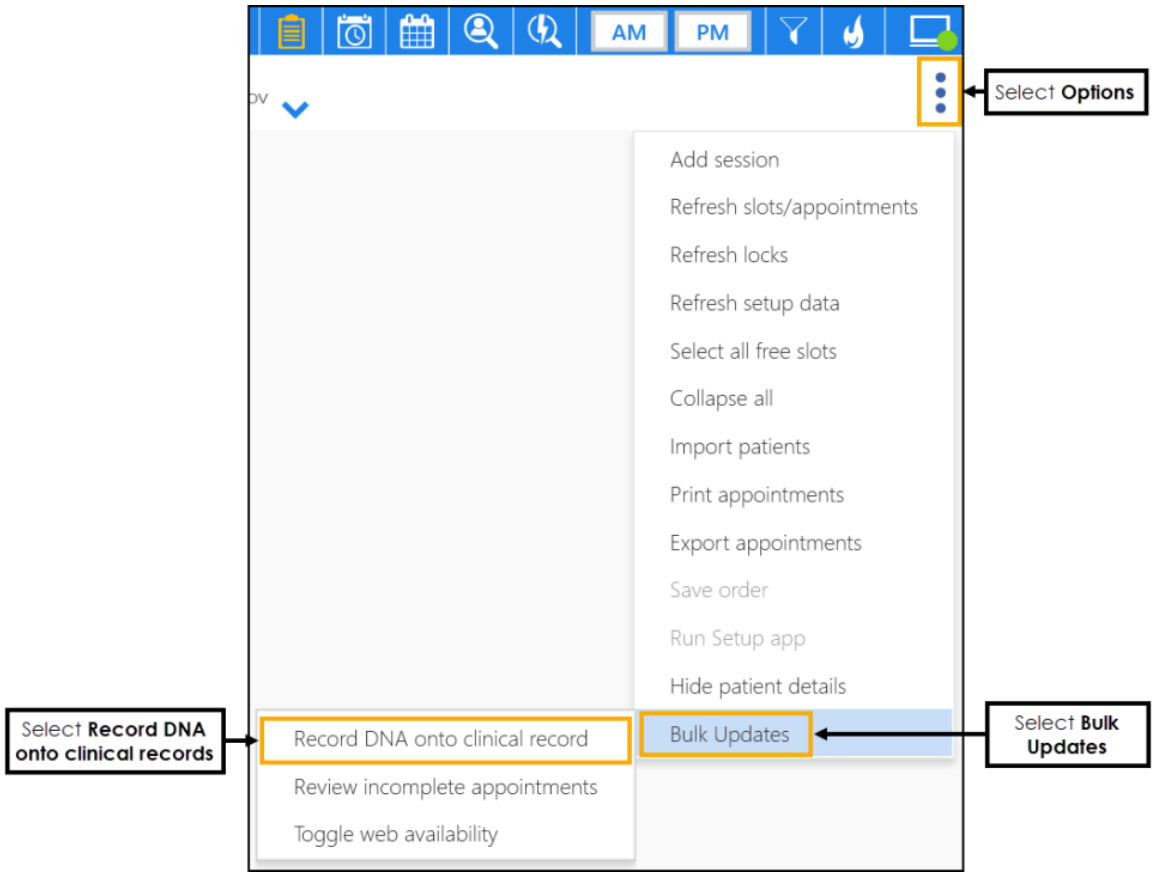
A DNA entry displays on the patient's clinical record:



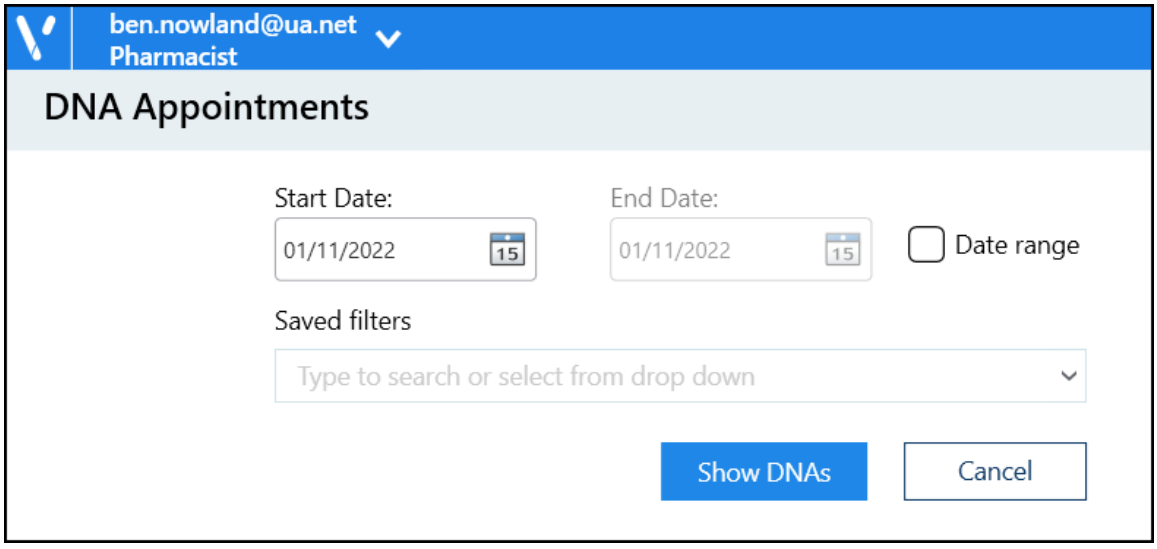
Recording DNA Clinical Codes for Multiple Patients

To record a DNA clinical code on multiple patient records:

1. From the **Reception View** or **Weekly View**, select **Options** , select **Bulk Updates**, and then select **Record DNA onto clinical record**:



2. The **DNA Appointments** screen displays:



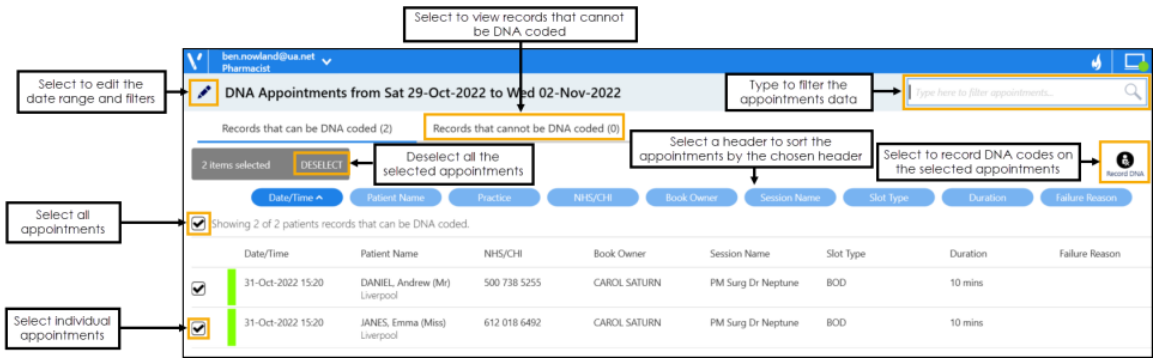
Complete as follows:

- **Start Date** - Select a date or tick **Date range** to select a date range.

> **Note** - The **Start Date** must be earlier than the **End Date**, both dates must be in the past (today included), and the range cannot exceed 31 days.

- **Saved filters** - If required, select an appointment filter.

3. Select **Show DNAs** Show DNAs, DNA appointments for the selected date / date range display:



> **Note** - Patient records that you cannot update with a DNA clinical code display on the **Records that cannot be DNA coded** tab. See **Appointments that Cannot be DNA Coded** on page **18** for more information.

Complete as required:

- **Edit** - Select **Edit** to return to the previous screen and change the date range and filters.
- **Sort** - Select a column header to sort the appointments by the chosen header, for example select **Session Name** to sort the appointments by the session type. You can sort ascending or descending as required.
- **Type here to filter appointments** - Start typing to filter appointments by the column data.

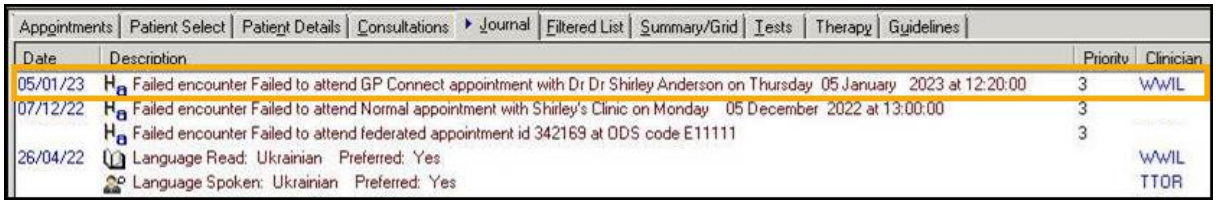
4. Tick to select individual appointments or tick **Select All** to select all the appointments in the list.

5. Select **Record DNA**

.

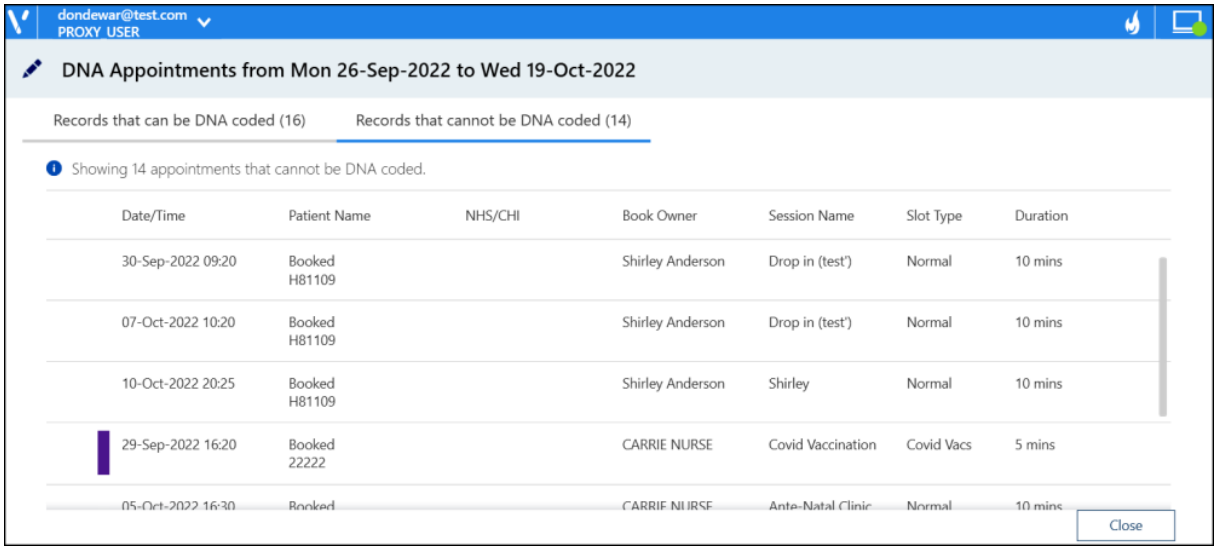
A message confirming the clinical entries displays:

A DNA entry displays on the patient's clinical records:



Appointments that Cannot be DNA Coded

Appointments that you cannot update with a DNA clinical code display on the **Records that cannot be DNA coded** tab:



It is not possible to add a DNA clinical code for these patients due to one or more of the following reasons:

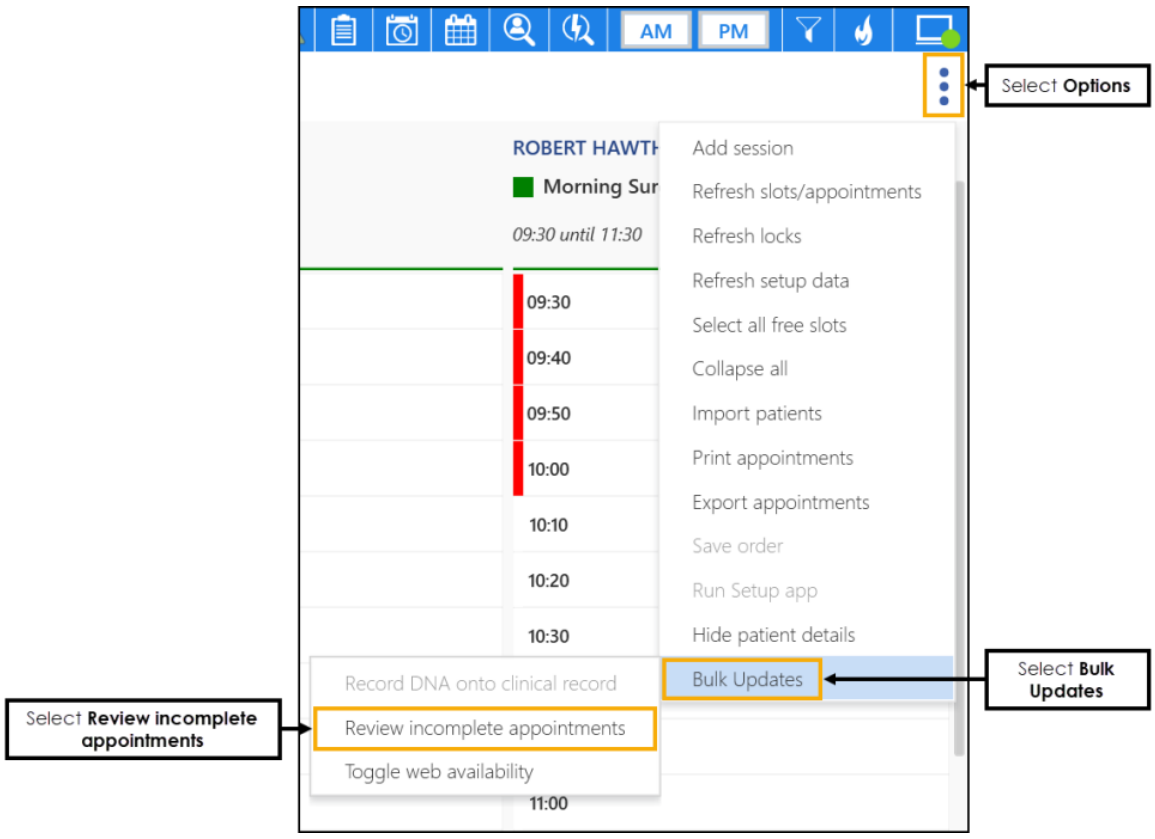
- You do not have the permissions to add data to the patient record.
- The appointment is a Special Booking and has no patient record attached.
- The patient is registered at a non-Vision practice.

Bulk Updating Incomplete Appointments

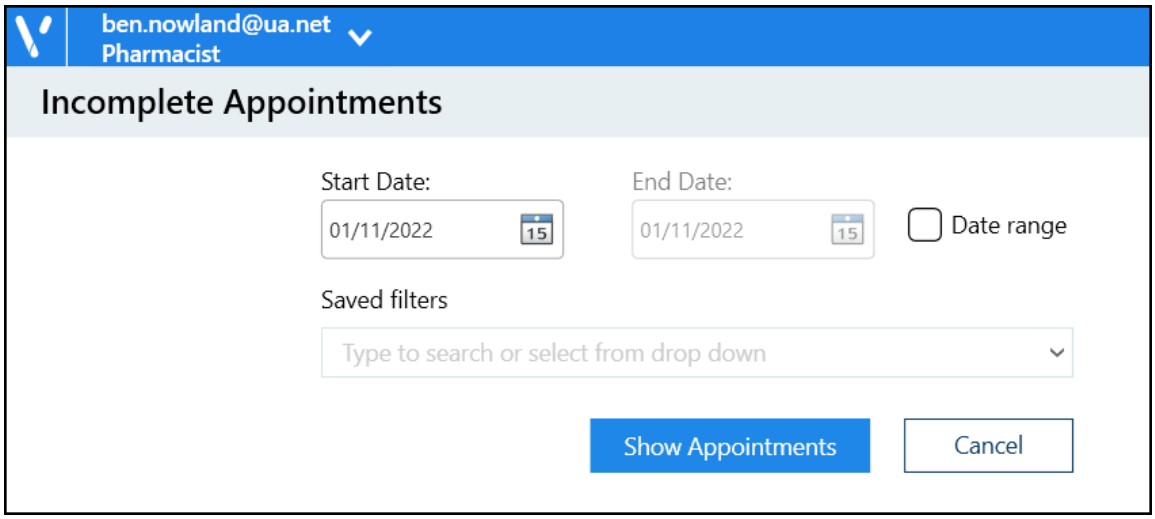
You can bulk update the status of incomplete appointments from the past seven days. Appointments left with an incomplete status of **Arrived**, **In consultation** or **DNA** can be changed to a different status.

To view the incomplete appointments:

1. From the **Reception View**, select **Options** - **Bulk Updates**, and then select **Review incomplete appointments**:



2. The **Incomplete Appointments** screen displays:



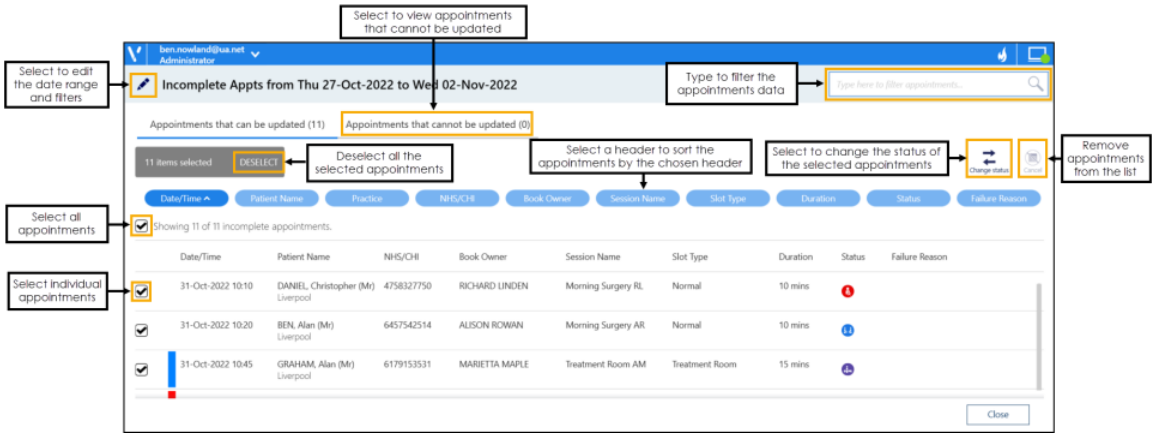
Complete as follows:

- **Start Date** - Select a date or tick **Date range** to select a date range.

> **Note** - The **Start Date** must be earlier than the **End Date**, both dates must be in the past (today included), and the range cannot exceed seven days.

- **Saved filters** - If required, select an appointment filter.

3. Select **Show Appointments** Show Appointments, incomplete appointments for the selected date / date range display:



> **Note** - Incomplete appointments that cannot be updated display on the **Appointments that cannot be updated** tab. See **Appointments that Cannot be Updated** on page **21** for more information.

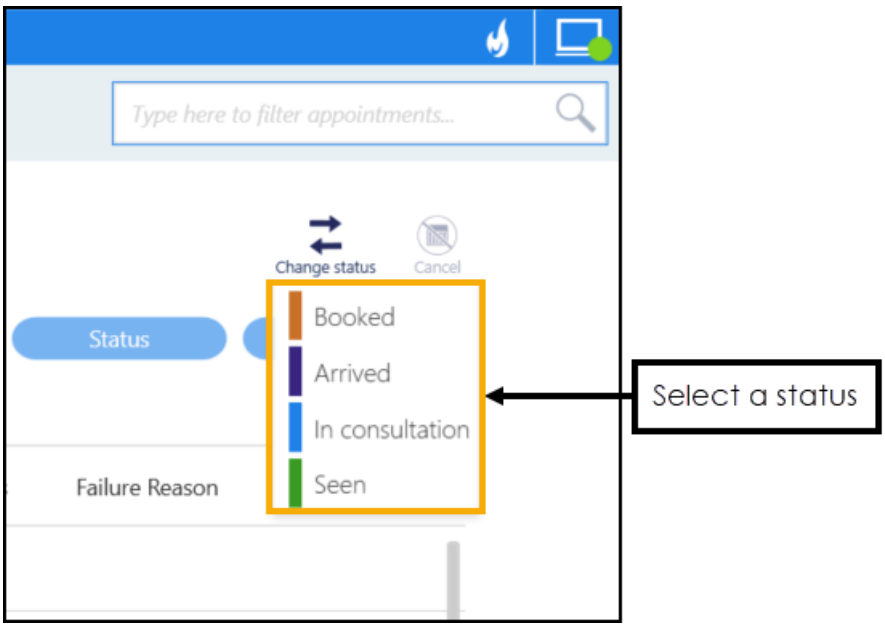
Complete as required:

- **Edit** - Select **Edit** to return to the previous screen and change the date range and filters.
- **Sort** - Select a column header to sort the appointments by the chosen header, for example select **Session Name** to sort the appointments by the session type. You can sort ascending or descending as required.
- **Type here to filter appointments** - Start typing to filter appointments by the column data.
- **Cancel** - Select **Cancel** Cancel to remove any selected appointments from the list.

4. Tick to select individual appointments or tick **Select All** to select all the appointments in the list.

5. Select **Change status**

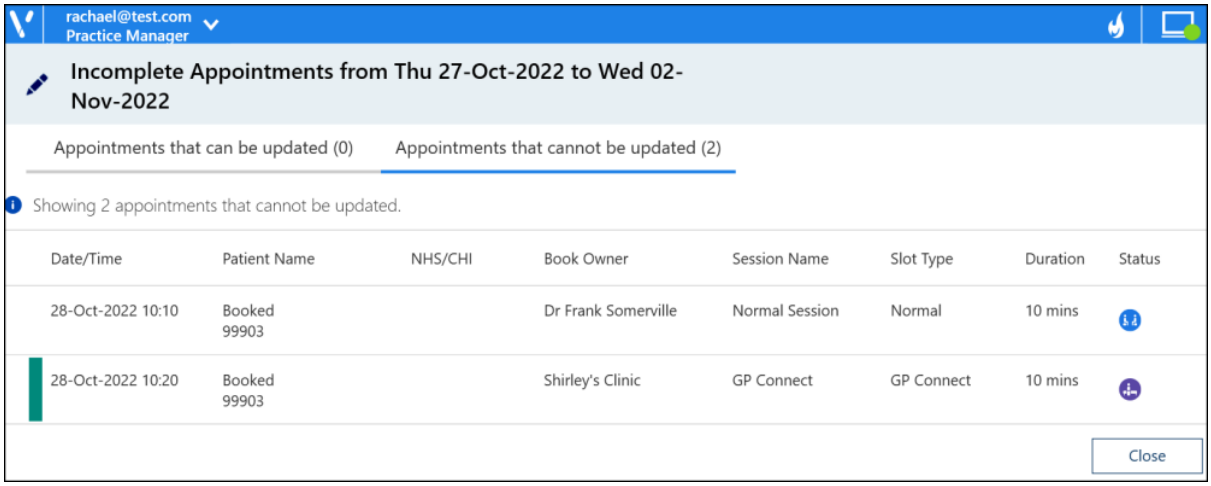
and the **Status List** displays.
6. Select an appointment status from the available list:



A message displays confirming the number of updated appointments:

Appointments that Cannot be Updated

Appointments that you cannot change the status for, display in the **Records that cannot be updated** tab:



It is not possible to update these appointments due to one or more of the following reasons:

- The slot is locked.
- The service is offline.
- You do not have the rights to view the patient details.

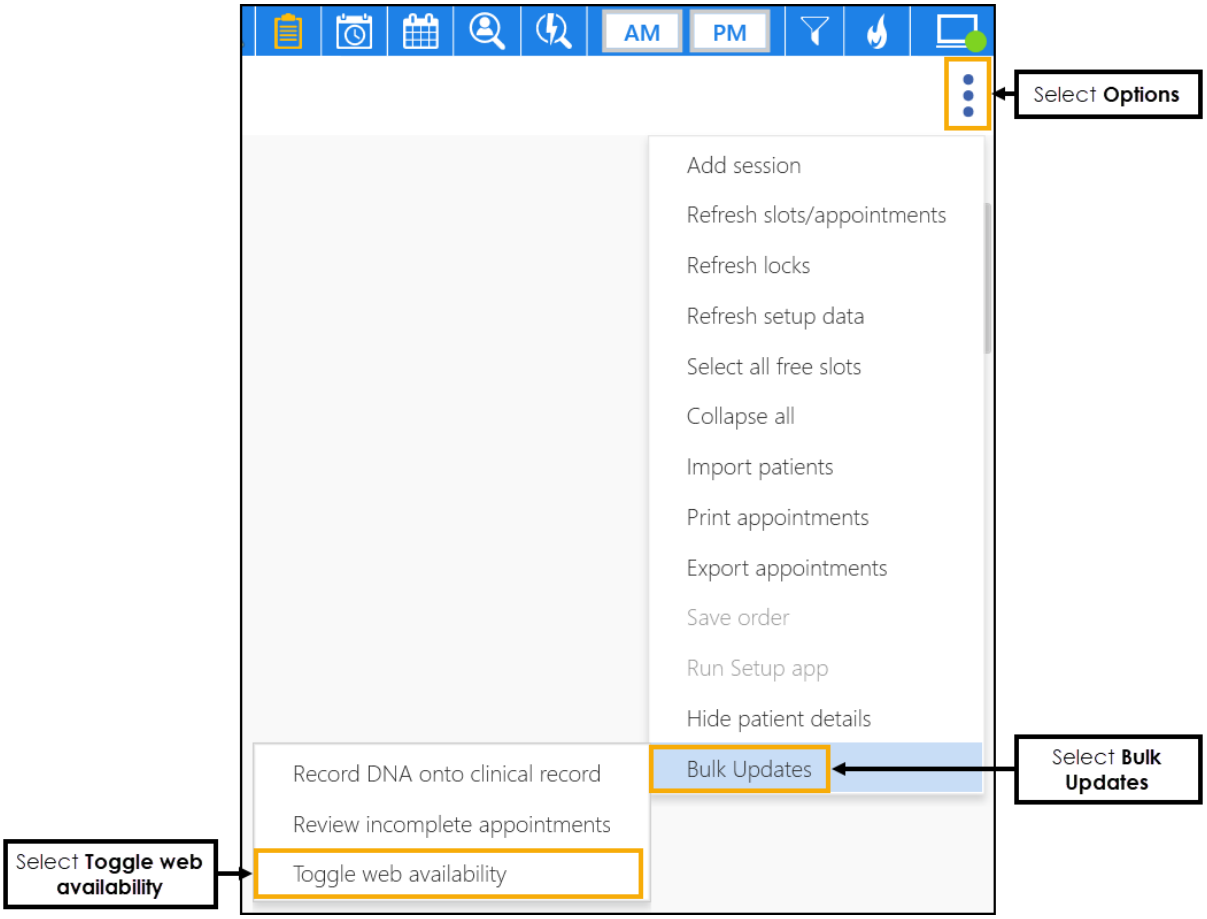
Bulk Updating Online Availability

You can bulk update free appointment slots to make them available or unavailable for your patients to book online.

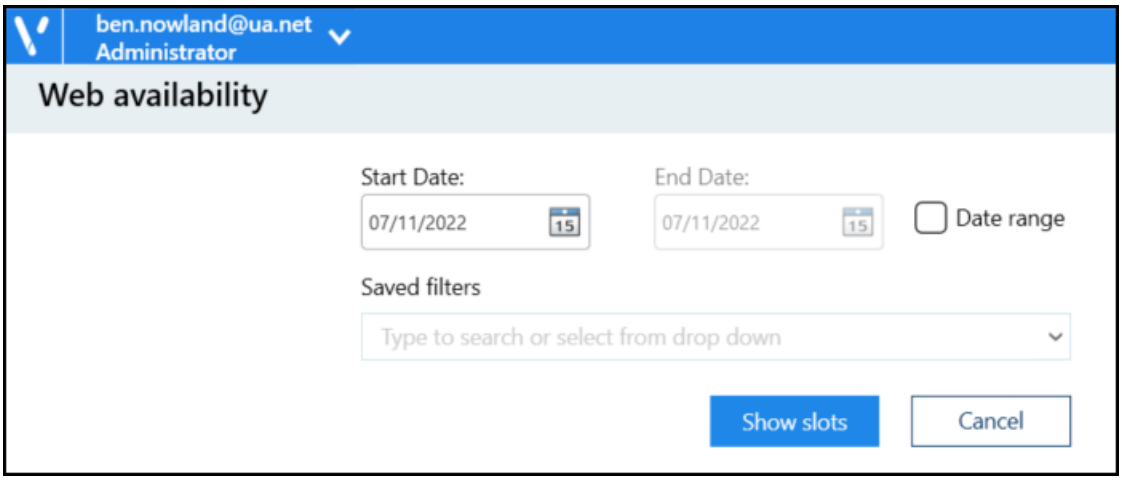
Remember - Your patients need an online account to be able to book appointments on line, see Registering Patients for Online Services in the **Patient Online Services Help Centre** for details.

To bulk enable or disable online bookings:

1. From the **Reception View** or **Weekly View**, select **Options** - **Bulk Updates**, and then select **Toggle web availability**:



2. The **Web availability** screen displays:



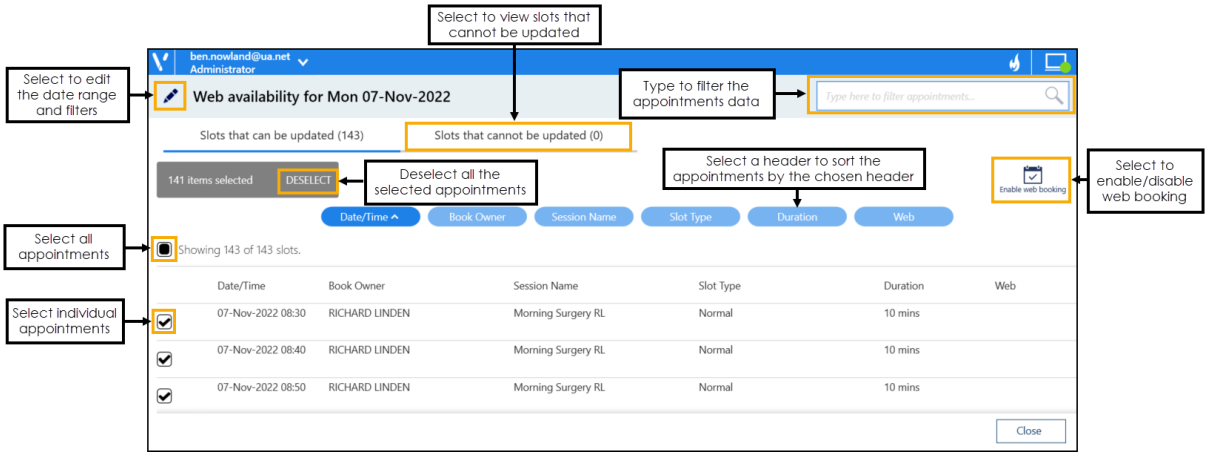
Complete as follows:

- **Start Date** - Select a date or tick **Date range** to select a date range.

> **Note** - The **Start Date** must be earlier than the **End Date**, both dates must be in the future (today included), and the range cannot exceed seven days.

- **Saved filters** - If required, select an appointment filter.

3. Select **Show slots** Show slots, available appointments for the selected date / date range display:



> **Note** - Free appointment slots that cannot be updated display on the **Slots that cannot be updated** tab. See **Slots that Cannot be Updated** on page **25** for more information.

Complete as required:

- **Edit** - Select **Edit** to return to the previous screen and change the date range and filters.
- **Sort** - Select a column header to sort the appointments by the chosen header, for example select **Session Name** to sort the appointments by the session type. You can sort ascending or descending as required.
- **Type here to filter appointments** - Start typing to filter appointments by the column data.

4. Tick to select individual appointments or tick **Select All** to select all the appointments in the list.

> **Note** - You must only select either **Web available** or **Web unavailable** slots at one time. The bulk update options are unavailable when selecting a mixture of slots.

5. Select **Enable web booking**

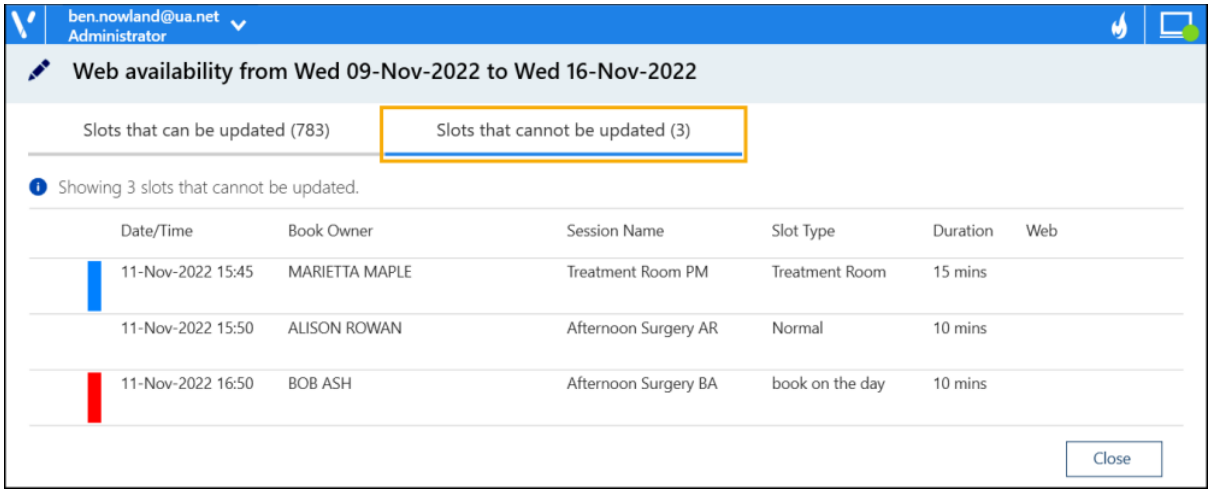
, or **Disable web booking**

as appropriate.

A message displays confirming the slots were enabled or disabled:

Slots that Cannot be Updated

Free slots that you cannot make available or unavailable for your patients to book online, display in the **Slots that cannot be updated** tab:



It is not possible to update these slots due to one or more of the following reasons:

- The slot is locked.
- The service is offline.
- Your current role doesn't have full access rights.
- The slot is held.
- The slot is unavailable.

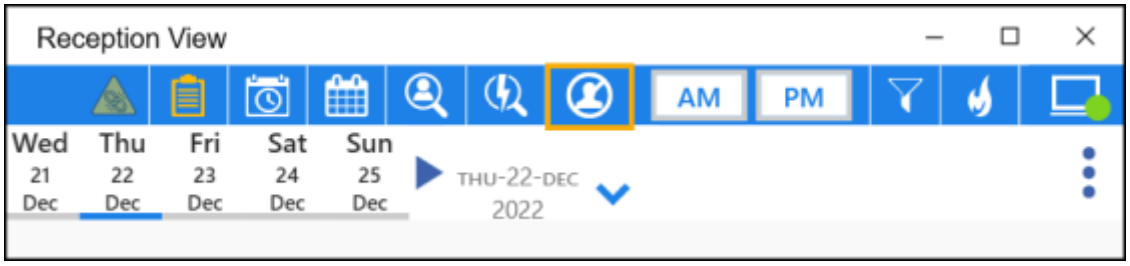
Show Today's Free Slots

Note - This option is only available on today's date from the **Reception View**.

Show today's free slots is a quick and easy way to display and book available slots for today.

To use the **Show today's free slots** option:

1. From the **Reception View** toolbar, select **Show today's free slots**:



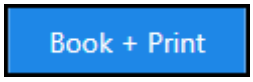
Note - **Show today's free slots** displays in orange to alert you when it is selected.

2. The **Reception View** screen displays available slots for today, maintaining any existing filters set up in the appointment view. Depending on your selection in **Preferences - General**, the display includes/excludes:
   - **Unbookable** - Free slots with a slot type that cannot currently be booked.
   - **Overrun** - Free overrun slots.

   Training Tip - **Locked** and **Unavailable** slots do not display. **Held** slots only display if you held the slot or you are a System Administrator.

3. If required, you can refine your search by:
   - **AM** or **PM**
   - Editing or applying filters.

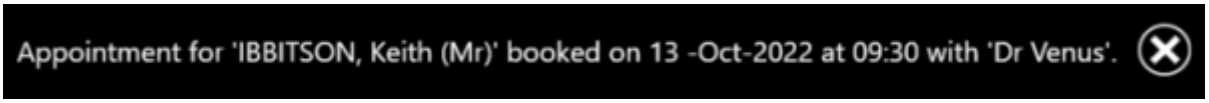
   You can also:
   - Access the **Clipboard** to drag appointments from the **Clipboard** to a free slot.
4. Select a slot to book and the appointment booking form displays.
5. Complete the booking form in the usual way.

6. Select either **Book and Print** 

or **Book**

as appropriate.

A message displays confirming the booking:



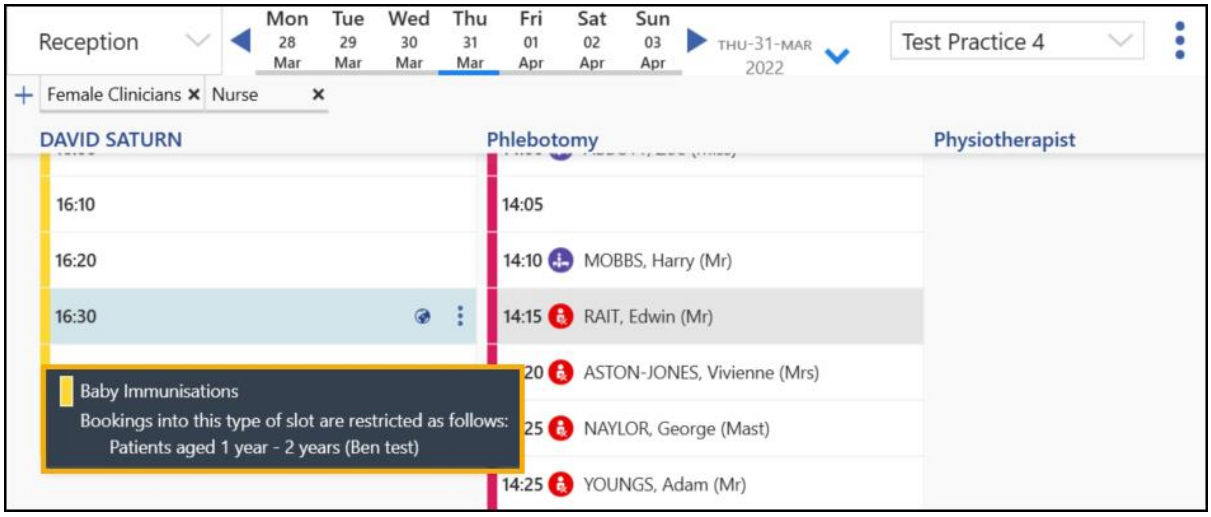
The slot no longer displays on the **Show today's free slots** appointments view.

Appointments Restrictions

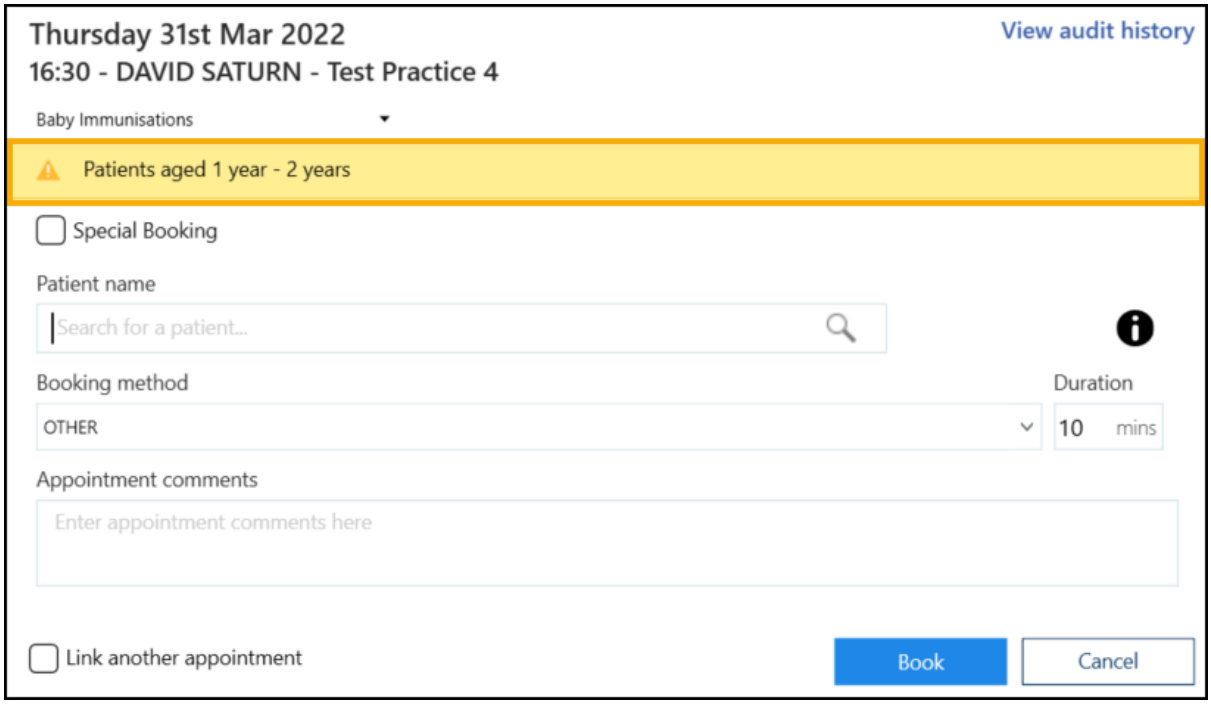
Slot Type Restrictions

Important - **Slot Type Restrictions** do not currently apply to slots being booked outside of your GP practice, for example, by your patients online. This issue is due to be addressed shortly, in the meantime we strongly advise you not to use restricted slots for appointments that can be booked outside of your GP practice.

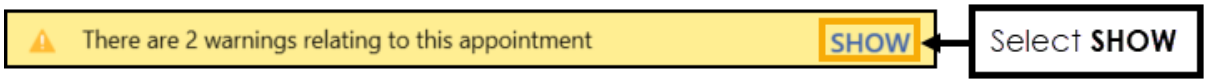
From the **Reception** and **Free slot search** views, if you hover your cursor over an appointment slot the **Slot Type Restriction** information displays in a tooltip:



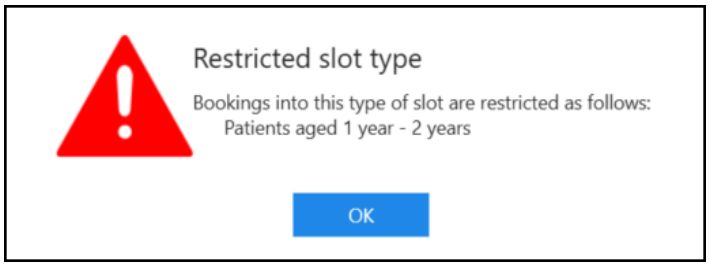
When you select a slot with an age and/or sex restriction in place, the restriction description displays in a yellow banner:



Where a slot has multiple restrictions, select **SHOW** to display the warnings:

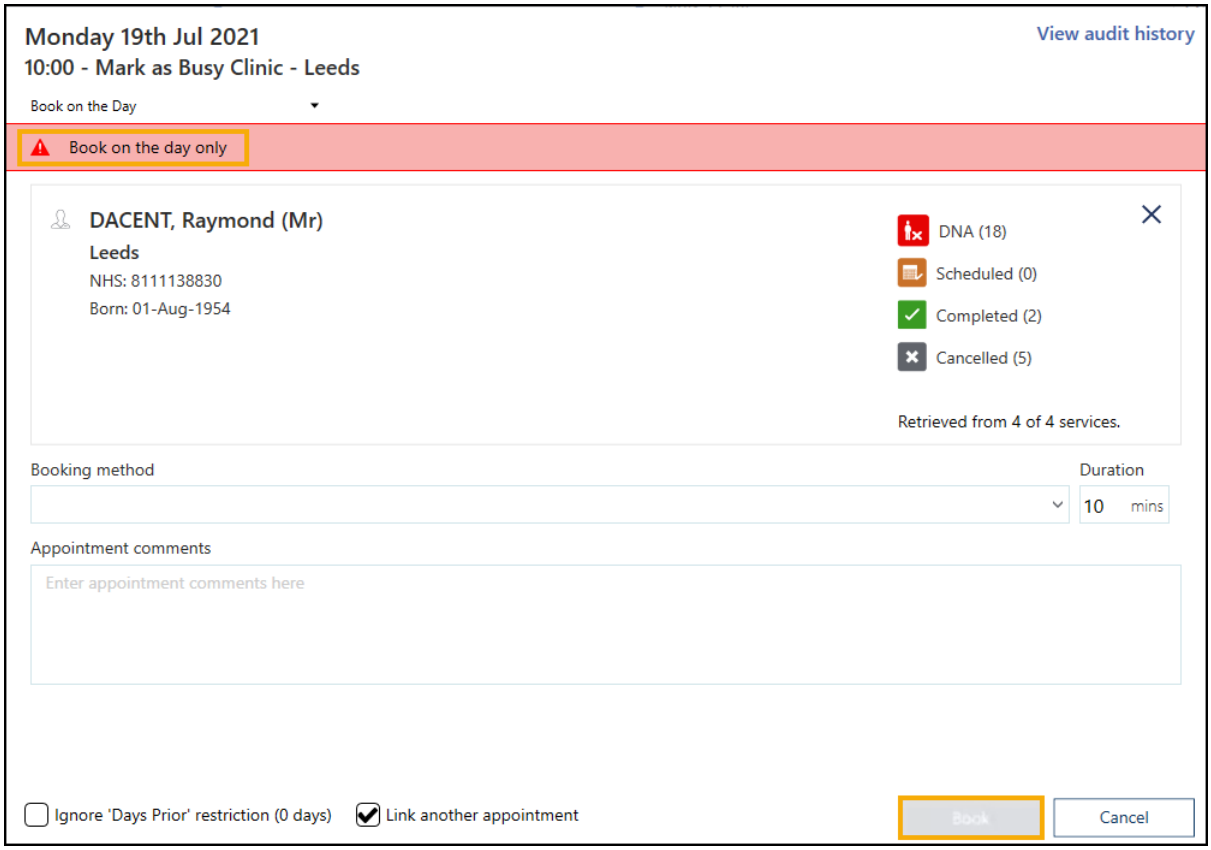


If you attempt to book an appointment for a patient who does not meet the specified restriction criteria, a warning displays and you cannot continue:

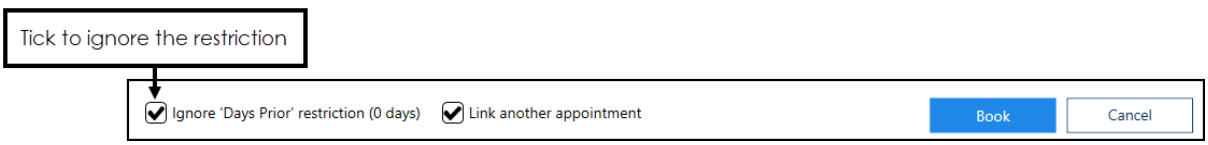


'Days Prior' Restriction

If you select a slot with a 'Days Prior' restriction, a warning displays and **Book** is not available:



- If **Enforce days/hours prior restrictions** is set in **Preferences - General** you cannot continue with the booking.
- If **Enforce days/hours prior restrictions** is not set in **Preferences - General** you can tick **Ignore 'Days Prior' restriction** on the booking form and book the slot:



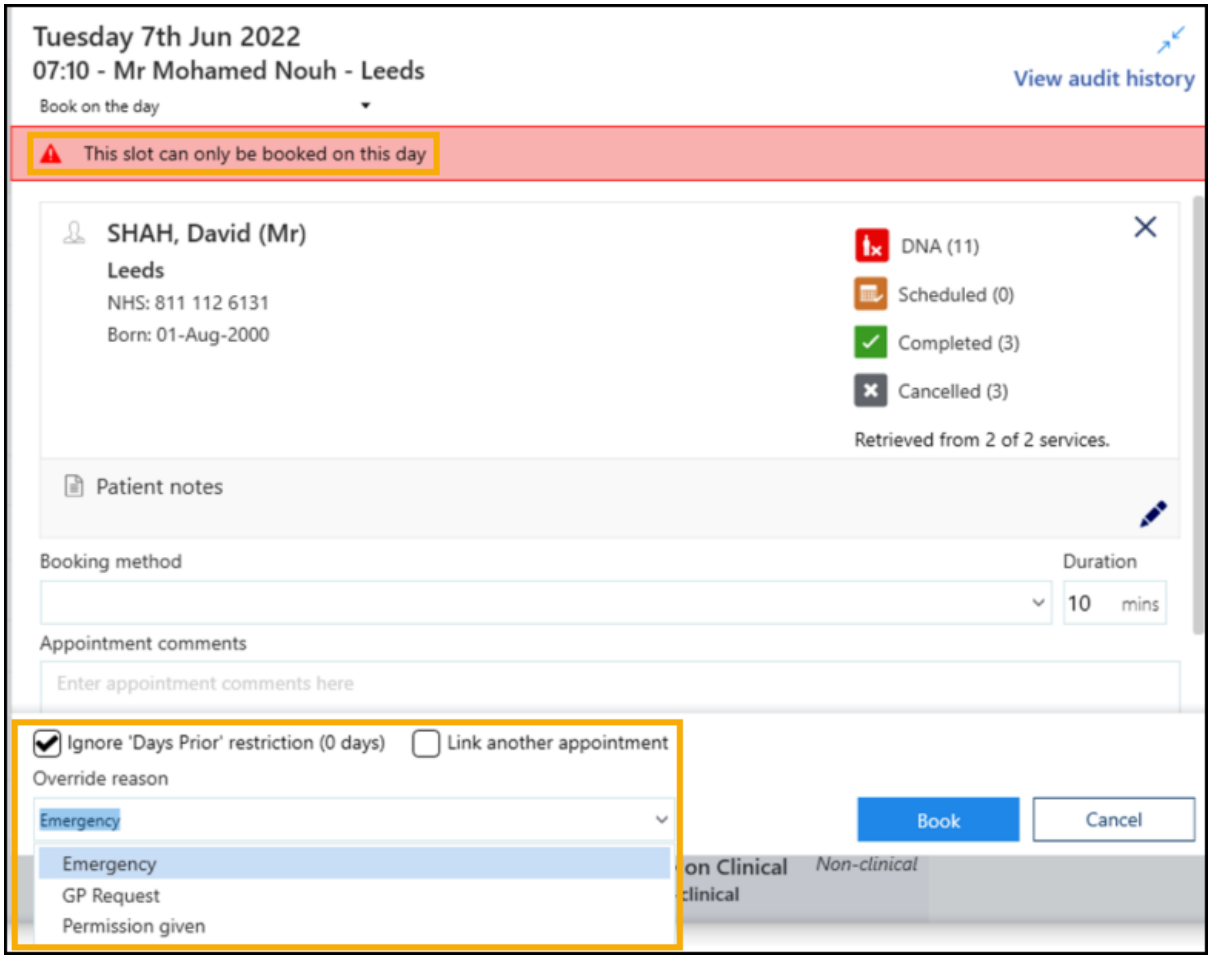
Overriding a 'Days Prior' Restriction

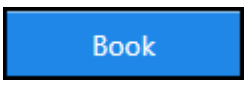
If **Enforce days/hours prior restrictions** is not set in **Preferences - General** and you tick **Ignore 'Days Prior' restriction** on the booking form to book the slot, you must enter an **Override Reason** to record why you booked an appointment in a slot with a **Days/Hours Prior** restriction.

> **Note** - You are only prompted to add an **Override Reason** when one is set up in **Appointments Setup**. See Adding Override Reasons in the **Appointments Setup** Help Centre for more information.

To override a **Days/Hours Prior** restriction:

1. From the **Reception View** select a slot with a **Days/Hours Prior** restriction. The booking form displays a warning.
2. Tick **Ignore 'Days Prior' restriction** on the booking form and select an **Override Reason** from the available list:



3. Select **Book**  to override the restriction and book the slot.

The **Slot Audit History** records **Override reasons** used to book an appointment in a slot with a **Days/Hours Prior** restriction.

National Patient Search - England Only

Note - Only available if you access **Appointments** from your **Desktop** in **England** and have a sharing agreement in place with a **SystmOne (TPP)** practice.

The **National Patient Search** facility allows you to find and book appointments for **SystmOne (TPP)** registered patients that you have a sharing agreement in place for. This is useful if you work in a federation of practices using multiple software providers.

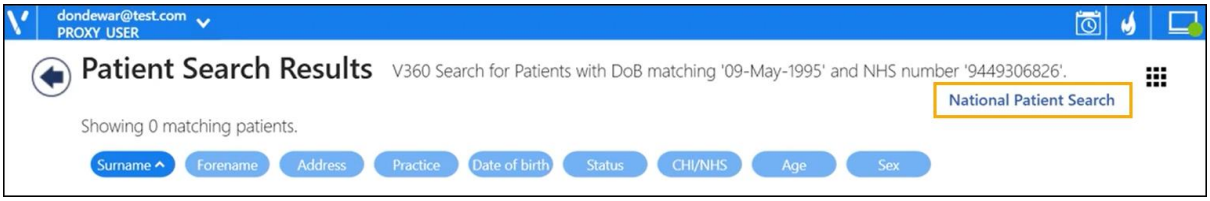
In a Shared Care Setting, the **Patient Search** option only searches for **Vision 3** and **EMIS** registered patients. If you have searched for a patient in the usual way and they cannot be found, you can use the **National Patient Search** facility to locate them.

To find a patient within your federation who is registered to a **SystmOne (TPP)** practice:

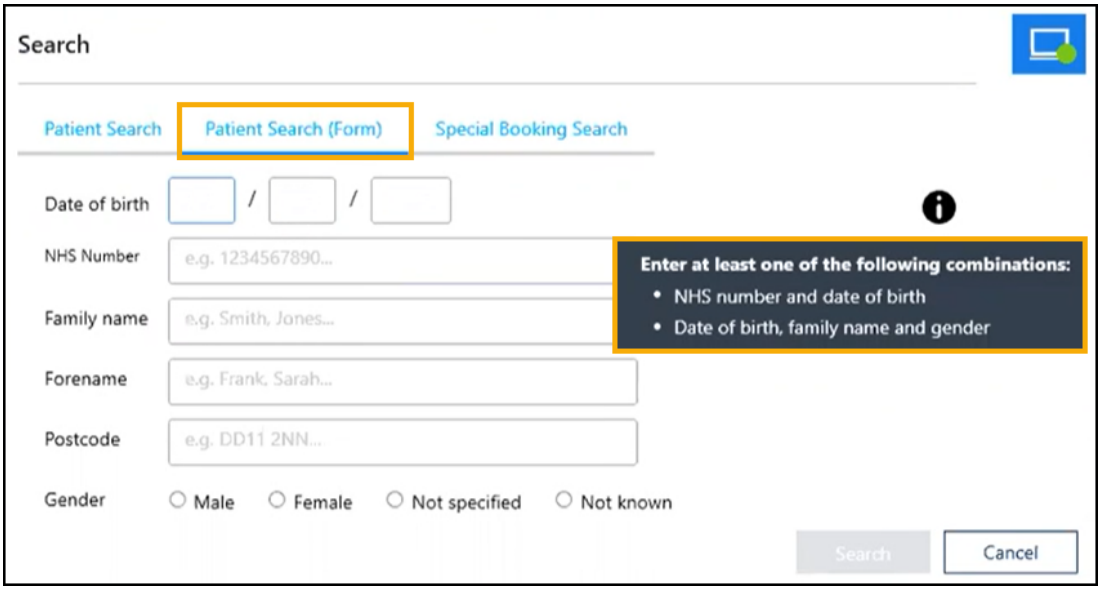
1. From the **Reception View** or **Weekly View**, press **F3** on your keyboard or select **Patient search** from the toolbar.
2. Search for a patient in the usual way.

Note - The initial search finds patients from **EMIS** and **Vision** practices that are within your federation and already on your database. Previously found **SystmOne (TPP)** patients also display, however the information may not be current. It is advisable to search for them again using the **National Patient Search** to find the current information.

3. If the patient you are searching for is not found, select **National Patient Search** National Patient Search:



- **Single input** - If your preferred search is set to **Single input** the **Patient Search (Form)** screen displays:



  Enter at least one of the following combinations to search:

  - **NHS Number** and **Date of birth**, or,
  - **Date of birth**, **Family name** and **Gender**

- **Multiple input** - If your preferred search is set to **Multiple input** the details entered in the previous **Search** screen are used to perform a **National Patient Search**.

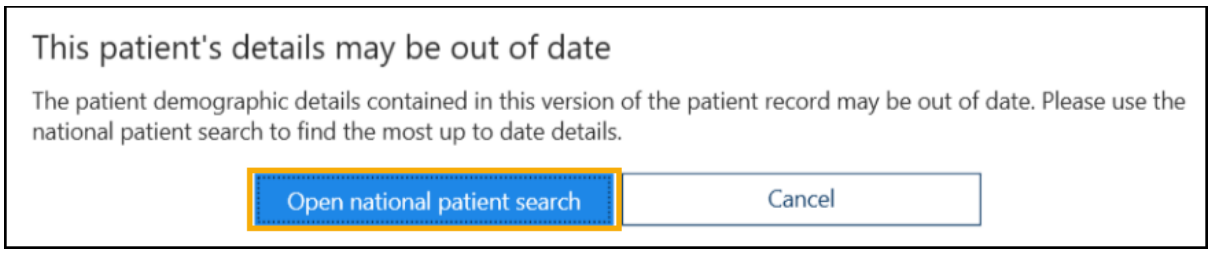
4. Select **Search**

.

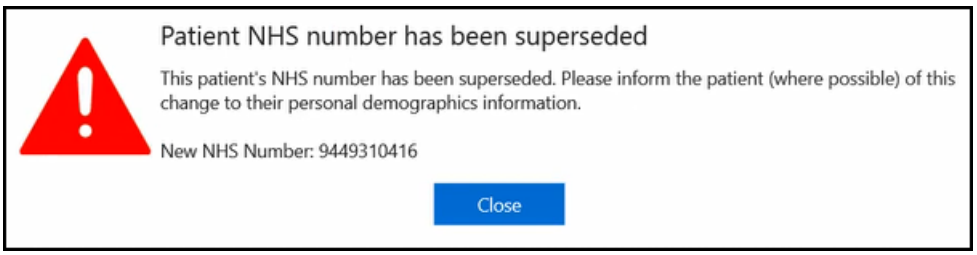
National Patient Search Warnings

The following **National Patient Search** warnings may display:

- **Out of date patient details** - A warning message displays when a patient has been previously found by a **National Patient Search** and they remain on your database. It is important that you select **Open national patient search** to find the most up to date patient demographic details:



- **Superseded NHS Number** - A warning message displays when performing a **National Patient Search** and returning a patient with a superseded NHS number:



- **Unverified NHS Number** - A warning message displays when performing a **National Patient Search** and the patient's NHS number cannot be verified: