

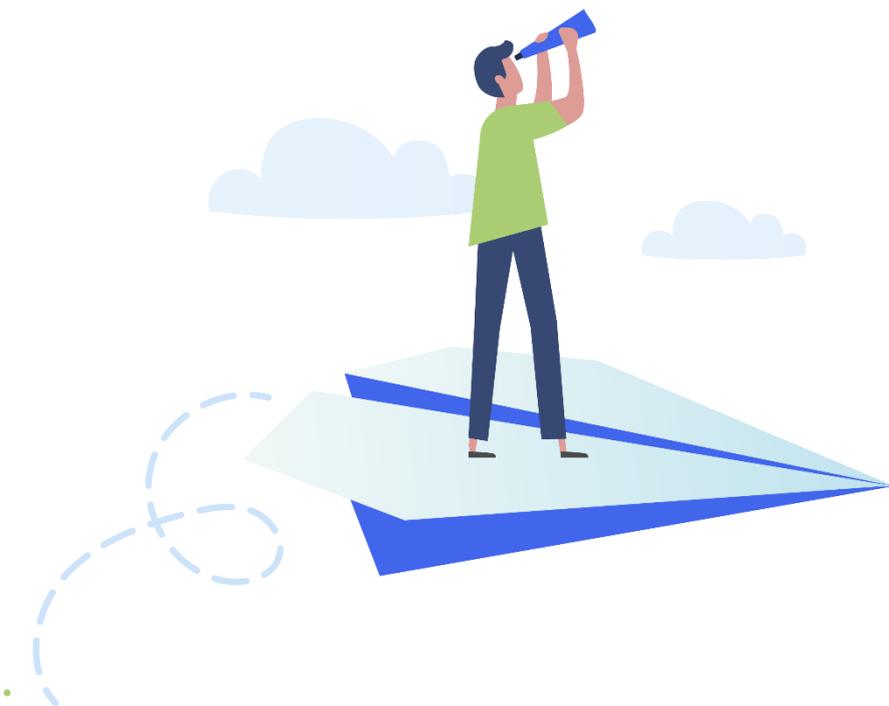


# Appointments

## Appointments Release 3.4

Version 1.2

11 January 2024





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## Appointments Release 3.4

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

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

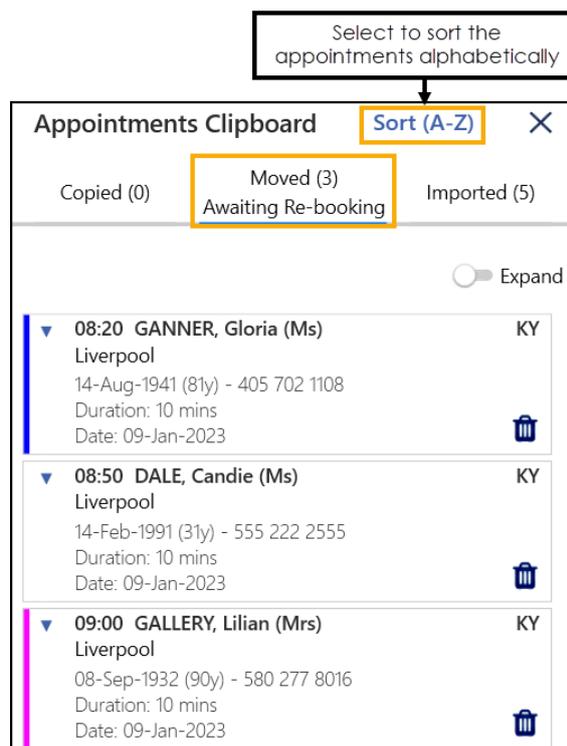
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 **Important** - For full functionality **Vision 3** users must be on **DLM 860**, see [Checking your Current DLM Version in the Vision 3 Front screen Help Centre](#) for details.

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### 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.



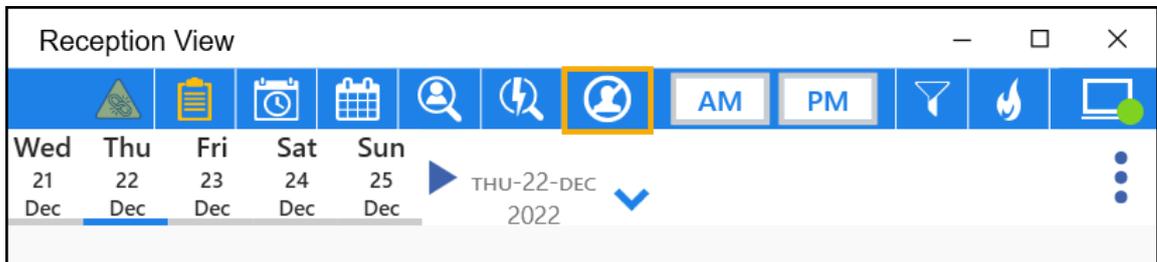
See [Bulk Updating Incomplete Appointments](#) on page **19** for more information.

- **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:

The screenshot shows the Appointments software interface. At the top, there is a toolbar with icons for a warning, clipboard, clock, calendar, search, lightning bolt, AM/PM buttons, a funnel, a flame, and a laptop. Below the toolbar, the date is set to '19-NOV 21'. The patient name is 'Mr Charlie Chan'. The location is 'Leeds'. The appointment type is 'Morning Surgery' at 'Birkhill Branch' from '08:00 until 10:00'. The appointment list shows '08:00' with a status of 'HABISHAW, Mary (Miss)' and '08:10'. A context menu is open over the appointment list, showing options: 'Add session', 'Refresh slots/appointments', 'Refresh locks', 'Refresh setup data', 'Select all free slots', and 'Collapse all'.



- **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:



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 See [Show Today's Free Slots](#) on page **26** for more information.

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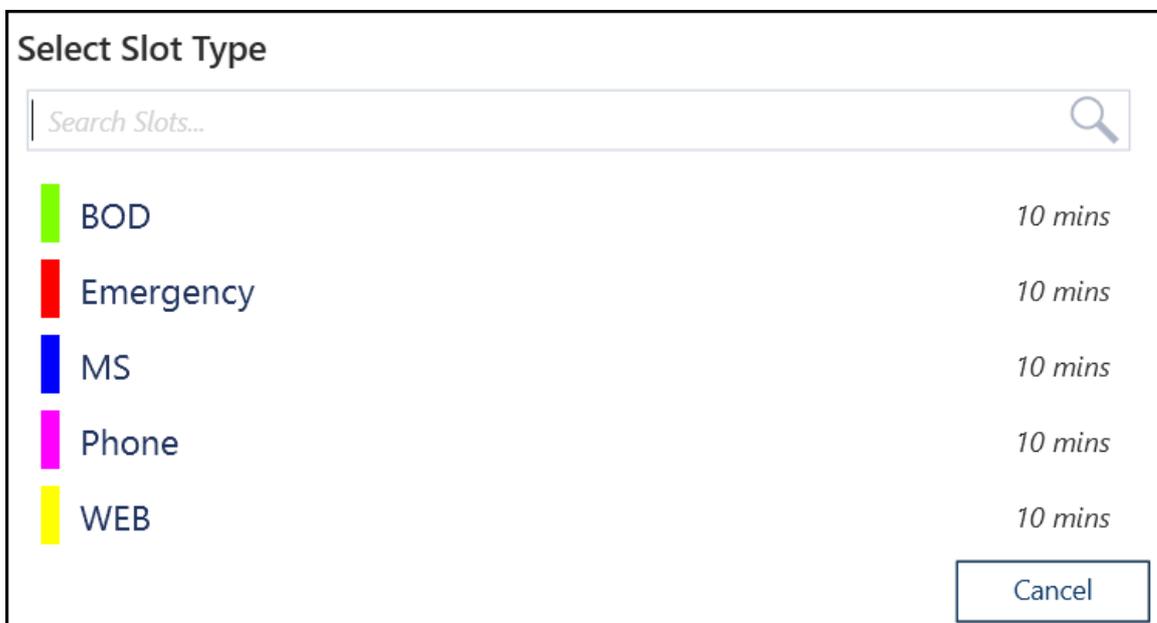
- **Appointment Override reasons** - When booking an appointment in a slot with a **Days/Hours Prior** restriction, you must now select a pre-defined **Override reason**.

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 See [Appointments Restrictions](#) on page **28** for more information.

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- **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:

Hover the cursor over **Hide Booking Form** to temporarily hide the booking form and display the appointment view

**Wednesday 17th Aug 2022**  
12:20 - Dr R Armstrong-Magee - Leeds

1Hour Prior

**⚠ This slot can only be booked 1 hour prior**

**BEAMAN, Timothy (Mr)**  
Leeds  
NHS: 811 112 2551  
Born: 01-Aug-1995

DNA (0)  
Scheduled (0)  
Completed (0)  
Cancelled (0)  
Retrieved from 2 of 2 services.

Patient notes

Booking method: [dropdown] Duration: 10 mins

Appointment comments: Enter appointment comments here

Ignore 'Hours Prior' restriction (1 hours)  Link another appointment

Override reason: GP Request

**Book + Print** **Book** **Cancel**

[View audit history](#)



- **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:

Time	Doctor	Appointment Type	Duration	Icons
09:00	Dr Saturn	Tel Triage 90 GP	10 mins	Warning triangle
09:00	Dr Holden	Diabetic Session	20 mins	Globe
09:00	Dr Harrison	Diabetic Session	20 mins	Globe
09:10	Dr Saturn	Tel Triage 90 GP	10 mins	Tag, Warning triangle
09:10	Dr Venus	9.00 - 12.30	10 mins	Globe, Tag, Warning triangle

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:

13:30  BAH, Victoria (Mrs) 

- Normal
- BAH, Victoria (Mrs)  
Leeds
- 01-Aug-1929 (92y) - 811 114 3575
-  H: 01241 8798373
- Open patient details

### 1. **Mobile number (M)**

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

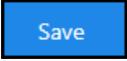
### 2. **Home number (H)**

### 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
	<input type="checkbox"/> Tue 25-Jan-2022 08:35	dondewar@test.com	Not available
	<input type="checkbox"/> Tue 25-Jan-2022 08:35	dondewar@test.com	Web enabled
	<input type="checkbox"/> Tue 25-Jan-2022 08:35	dondewar@test.com	Web disabled
	<input type="checkbox"/> Tue 25-Jan-2022 08:34	dondewar@test.com	Available
	<input type="checkbox"/> Tue 25-Jan-2022 08:34	dondewar@test.com	Released
	<input type="checkbox"/> 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:



The file you are about to export contains private patient identifiable information and must be treated in line with Data Protection Legislations for maintaining confidentiality.

Acknowledge confidentiality requirement

## 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**:

Friday 8th Jul 2022  
09:30 - Dr Alison Clarke - Local Practice

Emergency View audit history

Booked by SYS on Mon 04-Jul-2022 at 09:47

**BACKHOUSE, Vincent (Mr)**

Local Practice  
NHS: 1604303018  
Born: 16-May-1937

! Warning

i Reminders (14)

✖ DNA (4)

📅 Scheduled (1)

✔ Completed (0)

✖ Cancelled (0)

Retrieved from 1 of 1 services.

📄 Patient notes  
Adding notes for a reminder

Booking method	Duration	Arrived	Started	Ended
▼	10 mins	hh : mm	hh : mm	hh : mm

Appointment comments  
Adding comments - new

Update
Cancel

- **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**.

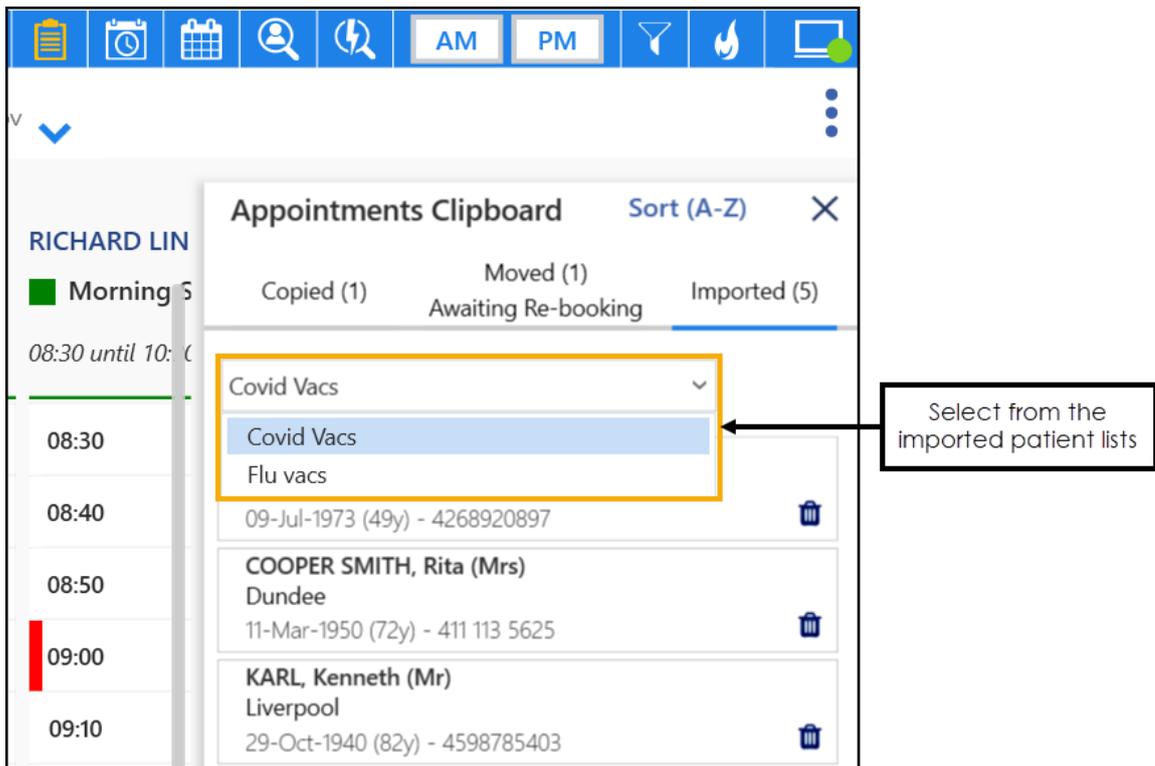
**i Important** - This is only available if you have **Vision 3** running on your workstation and you have access rights to **Registration** for registration records in **Vision 3**. See [Adding and removing users and groups from Vision functions](#) in the **Management Tools Help Centre** for more details.



## 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:



**Appointments Clipboard** Sort (A-Z) X

Copied (1) Moved (1) Imported (5)  
Awaiting Re-booking

Covid Vacs

Covid Vacs

Flu vacs

09-Jul-1973 (49y) - 4268920897

**COOPER SMITH, Rita (Mrs)**  
Dundee  
11-Mar-1950 (72y) - 411 113 5625

**KARL, Kenneth (Mr)**  
Liverpool  
29-Oct-1940 (82y) - 4598785403

Select from the imported patient lists



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

Joint Appointments

Enable Joint Appointments

Maximum time between joint appointments  mins

- **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.

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See [Preferences - General](#), and [Joint Appointments Quick Reference Guide](#) for more information.

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

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 See [National Patient Search - England Only](#) on page 31 for more details.

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- **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:

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

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

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 See [Appointments Setup Release 3.4](#) for details about what is new in **Appointments Setup**.

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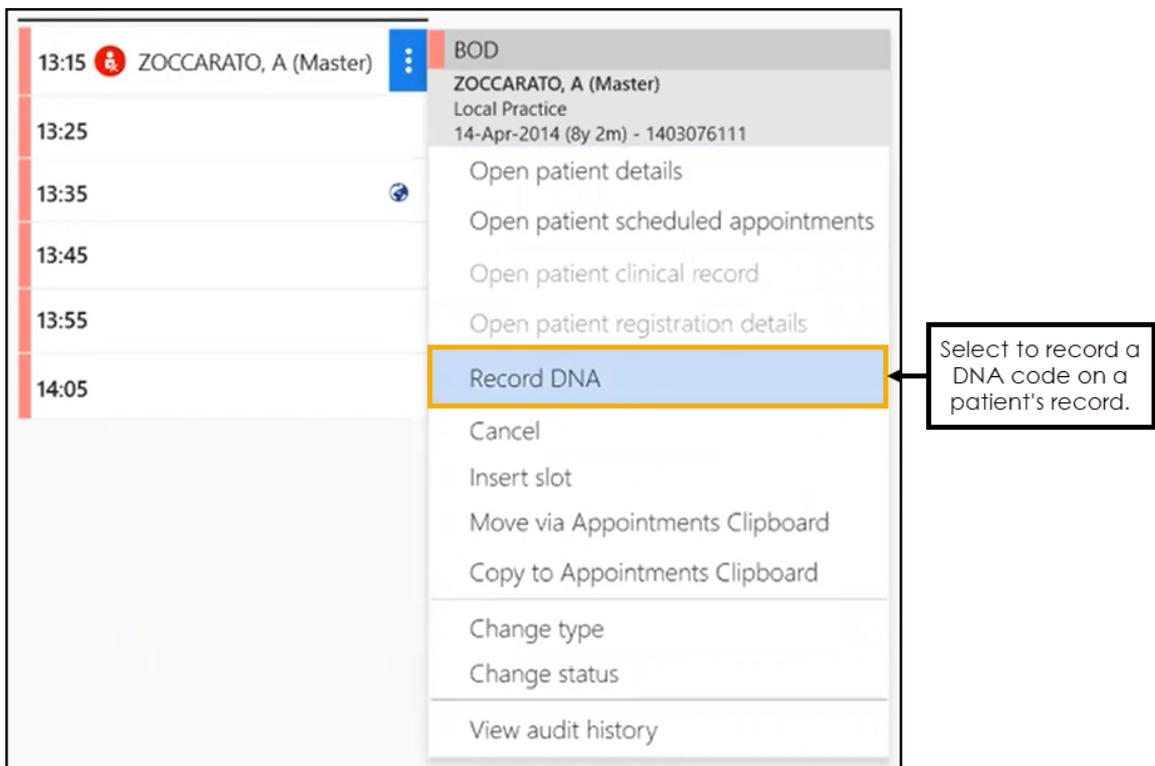
## Recording DNA Clinical Codes from Appointments

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:

**Confirm DNA Coding**

Are you sure you wish to record a DNA entry into the clinical record of ZOCCARATO, A (Master)?

Select **Record DNA**  to confirm.

A message confirming the clinical entry displays:

**DNA added to the clinical record of ZOCCARATO, A (Master).**

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

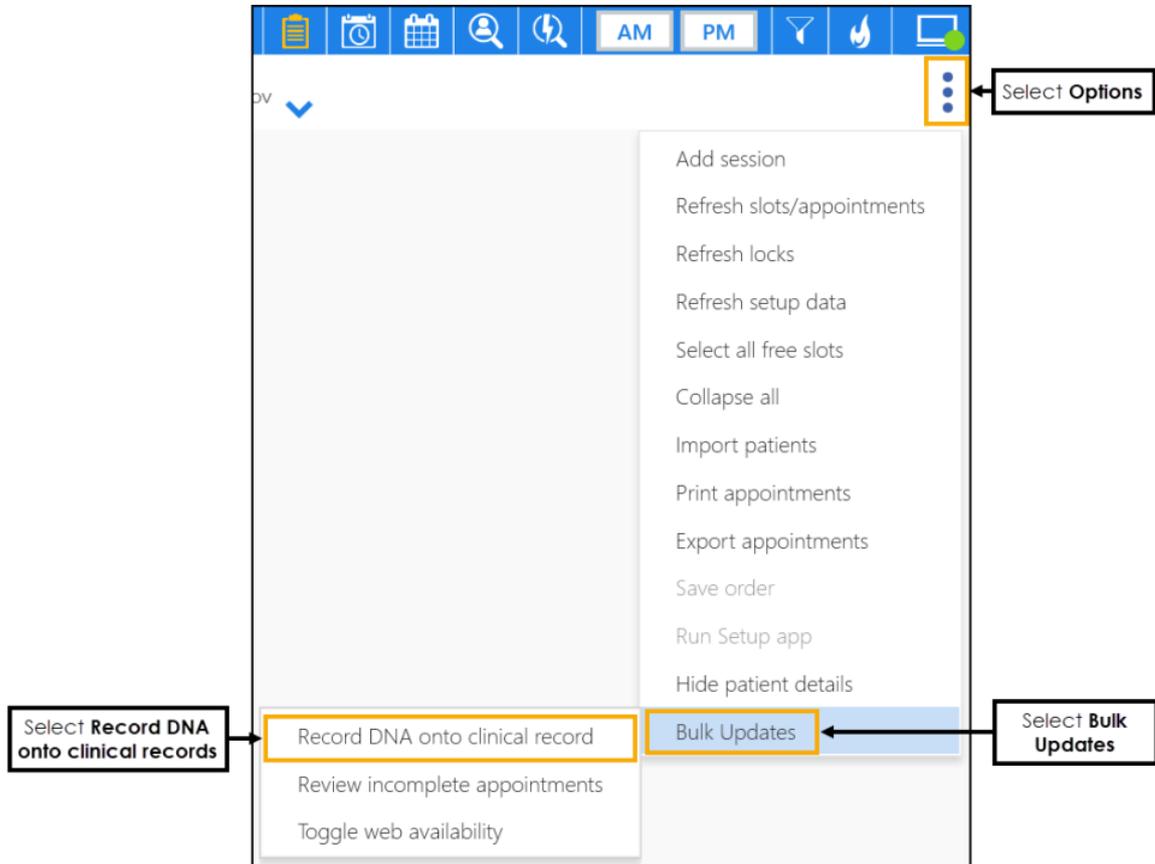
Date	Description	Priority	Clinician
05/01/23	H Failed encounter Failed to attend GP Connect appointment with Dr Dr Shirley Anderson on Thursday 05 January 2023 at 12:20:00	3	WWIL
07/12/22	H Failed encounter Failed to attend Normal appointment with Shirley's Clinic on Monday 05 December 2022 at 13:00:00	3	
	H Failed encounter Failed to attend federated appointment id 342169 at DDS code E11111	3	
26/04/22	U Language Read: Ukrainian Preferred: Yes		WWIL
	U Language Spoken: Ukrainian Preferred: Yes		TTOR



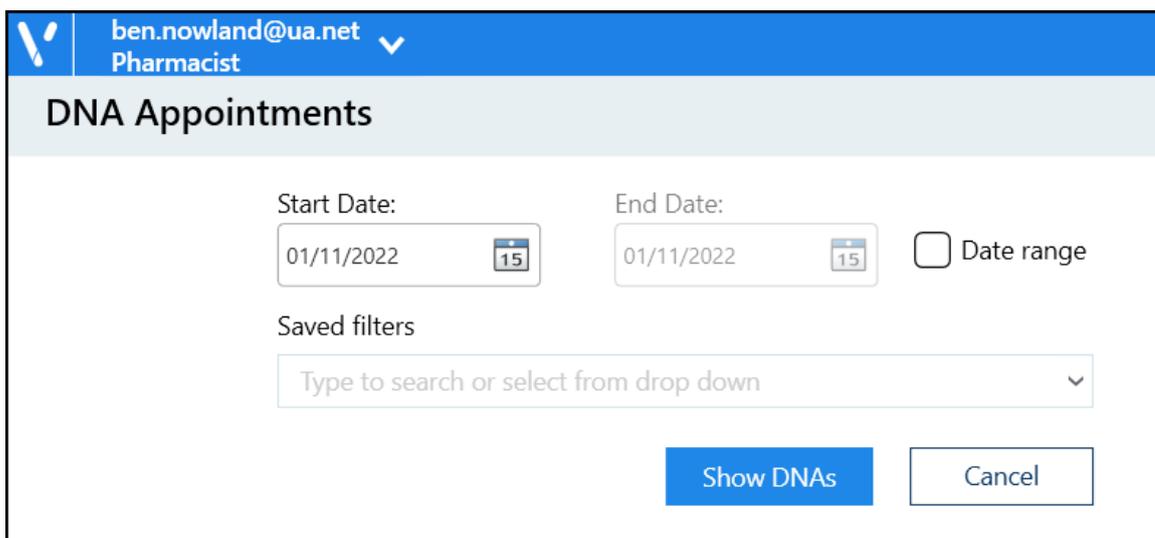
## Recording DNA Clinical Codes for Multiple Patients

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:





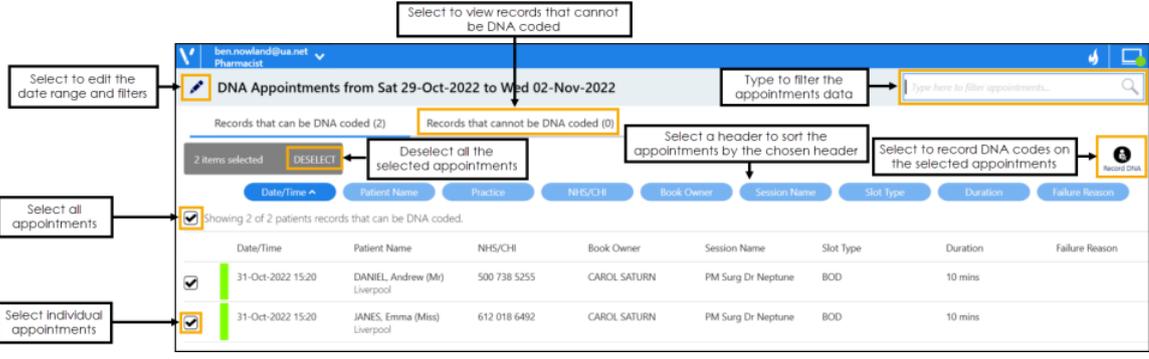
Complete as follows:

- **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** , DNA appointments for the selected date / date range display:



The screenshot shows the 'DNA Appointments' screen for the date range 'Sat 29-Oct-2022 to Wed 02-Nov-2022'. It features a search bar, a 'DESELECT' button, and a table of appointments. Callouts point to various elements:

- Select to edit the date range and filters**: Points to the date range header.
- Select to view records that cannot be DNA coded**: Points to the 'Records that cannot be DNA coded (0)' tab.
- Type to filter the appointments data**: Points to the search bar.
- Select all appointments**: Points to the 'Showing 2 of 2 patients records that can be DNA coded.' checkbox.
- Select individual appointments**: Points to the checkboxes for individual rows in the table.
- Deselect all the selected appointments**: Points to the 'DESELECT' button.
- Select a header to sort the appointments by the chosen header**: Points to a column header in the table.
- Select to record DNA codes on the selected appointments**: Points to the 'Record DNA' button.

Date/Time	Patient Name	NHS/CHI	Book Owner	Session Name	Slot Type	Duration	Failure Reason
31-Oct-2022 15:20	DANIEL, Andrew (Mr) Liverpool	500 738 5255	CAROL SATURN	PM Surg Dr Neptune	BOD	10 mins	
31-Oct-2022 15:20	JANES, Emma (Miss) Liverpool	612 018 6492	CAROL SATURN	PM Surg Dr Neptune	BOD	10 mins	

 **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:

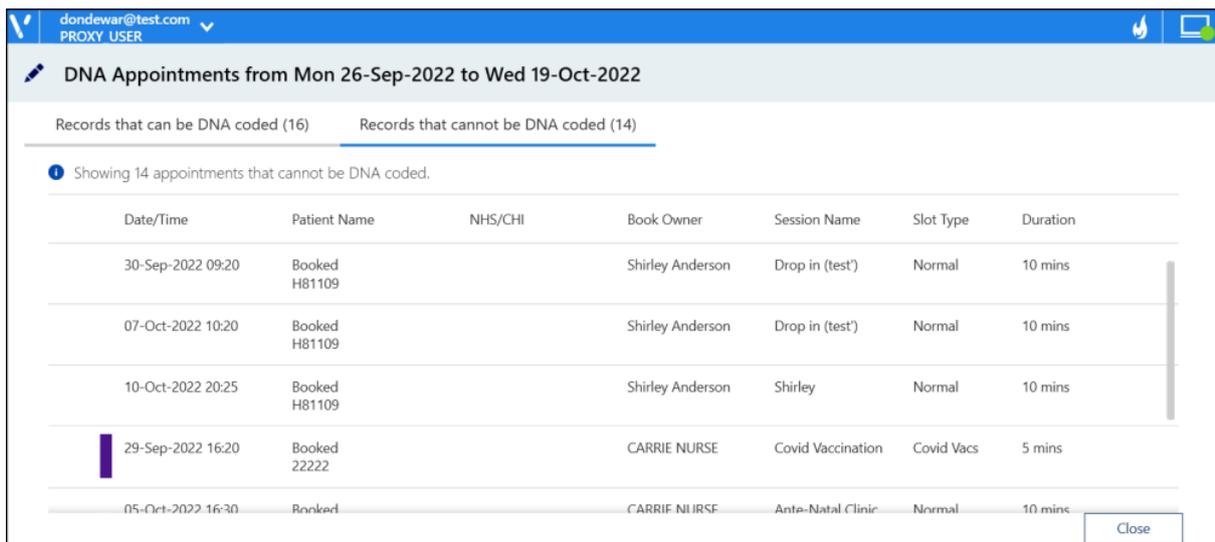


A DNA entry displays on the patient's clinical records:

Date	Description	Priority	Clinician
05/01/23	Failed encounter Failed to attend GP Connect appointment with Dr Dr Shirley Anderson on Thursday 05 January 2023 at 12:20:00	3	WWIL
07/12/22	Failed encounter Failed to attend Normal appointment with Shirley's Clinic on Monday 05 December 2022 at 13:00:00	3	
26/04/22	Failed encounter Failed to attend federated appointment id 342169 at ODS code E11111	3	
	Language Read: Ukrainian Preferred: Yes		WWIL
	Language Spoken: Ukrainian Preferred: Yes		TTOR

## 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:



DNA Appointments from Mon 26-Sep-2022 to Wed 19-Oct-2022

Records that can be DNA coded (16)    Records that cannot be DNA coded (14)

Showing 14 appointments that cannot be DNA coded.

Date/Time	Patient Name	NHS/CHI	Book Owner	Session Name	Slot Type	Duration
30-Sep-2022 09:20	Booked H81109		Shirley Anderson	Drop in (test)	Normal	10 mins
07-Oct-2022 10:20	Booked H81109		Shirley Anderson	Drop in (test)	Normal	10 mins
10-Oct-2022 20:25	Booked H81109		Shirley Anderson	Shirley	Normal	10 mins
29-Sep-2022 16:20	Booked 22222		CARRIE NURSE	Covid Vaccination	Covid Vacs	5 mins
05-Oct-2022 16:30	Booked		CARRIE NURSE	Ante-Natal Clinic	Normal	10 mins

Close

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.

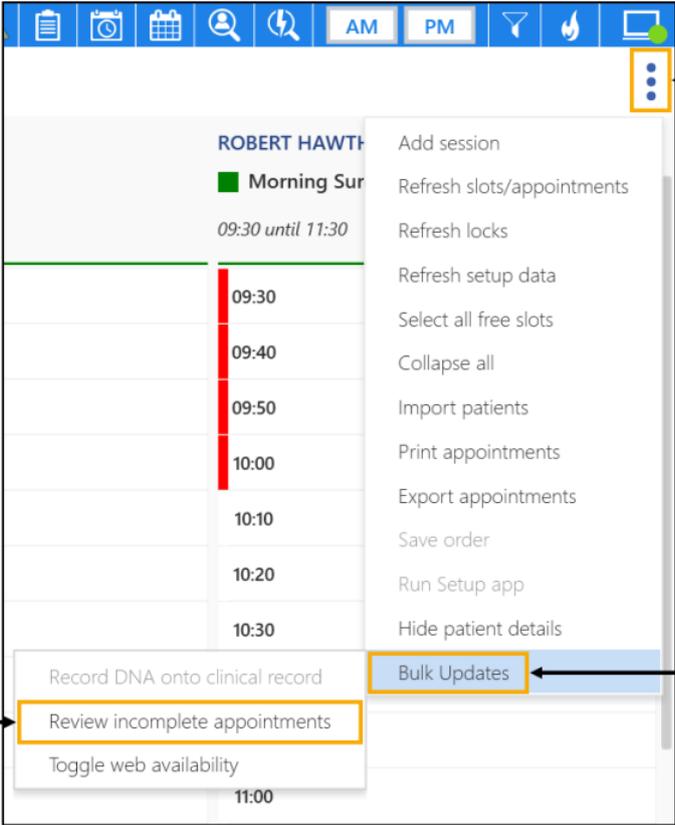


## Bulk Updating Incomplete Appointments

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.

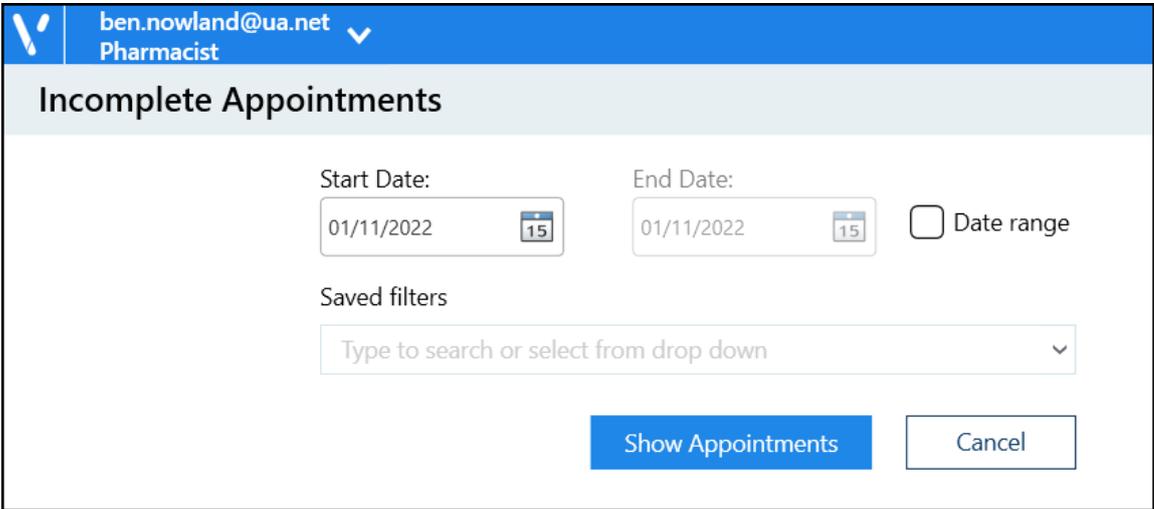
To view the incomplete appointments:

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



The screenshot shows the Reception View interface. At the top, there are navigation icons and a toolbar with 'AM' and 'PM' buttons. A dropdown menu is open, showing various options. A callout box labeled 'Select Options' points to the three-dot menu icon. Another callout box labeled 'Select Bulk Updates' points to the 'Bulk Updates' option in the dropdown menu. A third callout box labeled 'Select Review incomplete appointments' points to the 'Review incomplete appointments' option in the dropdown menu. The background shows a calendar view for 'ROBERT HAWTHORNE' with a 'Morning Sur' session from 09:30 until 11:30. The calendar slots are listed from 09:30 to 11:00.

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



The screenshot shows the 'Incomplete Appointments' screen. At the top, there is a blue header bar with the user's name 'ben.nowland@ua.net' and 'Pharmacist'. Below the header, the title 'Incomplete Appointments' is displayed. The main area contains two date pickers: 'Start Date:' with the value '01/11/2022' and 'End Date:' with the value '01/11/2022'. There is a checkbox labeled 'Date range' which is currently unchecked. Below the date pickers, there is a section for 'Saved filters' with a search input field containing the text 'Type to search or select from drop down'. At the bottom, there are two buttons: 'Show Appointments' and 'Cancel'.



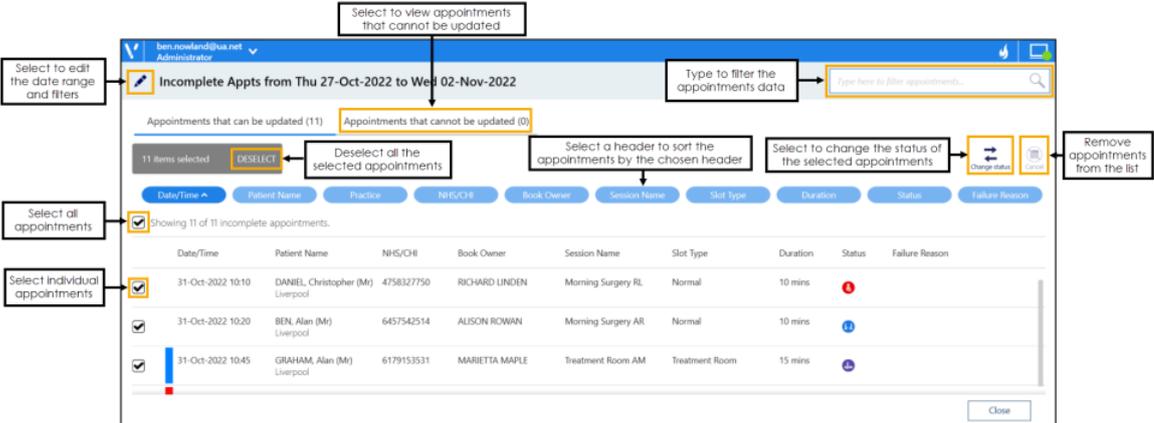
Complete as follows:

- **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** , incomplete appointments for the selected date / date range display:



The screenshot shows the 'Incomplete Appointments' interface. Callouts include:
 

- Select to edit the date range and filters**: Points to the date range 'Thu 27-Oct-2022 to Wed 02-Nov-2022'.
- Select to view appointments that cannot be updated**: Points to the 'Appointments that cannot be updated (0)' tab.
- Type to filter the appointments data**: Points to the search bar 'Type here to filter appointments...'.
- Select all appointments**: Points to the 'SELECT ALL' button.
- Select Individual appointments**: Points to the checkboxes in the table.
- Deselect all the selected appointments**: Points to the 'Deselect' button.
- Select a header to sort the appointments by the chosen header**: Points to the column headers like 'Date/Time', 'Patient Name', etc.
- Select to change the status of the selected appointments**: Points to the 'Change status' button.
- Remove appointments from the list**: Points to the trash icon.

Date/Time	Patient Name	NHS/CHI	Book Owner	Session Name	Slot Type	Duration	Status	Failure Reason
31-Oct-2022 10:10	DANIEL, Christopher (M) Liverpool	4758327750	RICHARD LINDEN	Morning Surgery RL	Normal	10 mins		
31-Oct-2022 10:20	BEN, Alan (Mr) Liverpool	6457542514	ALISON ROWAN	Morning Surgery AR	Normal	10 mins		
31-Oct-2022 10:45	GRAHAM, Alan (M) Liverpool	6179153531	MARIETTA MAPLE	Treatment Room AM	Treatment Room	15 mins		

 **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:

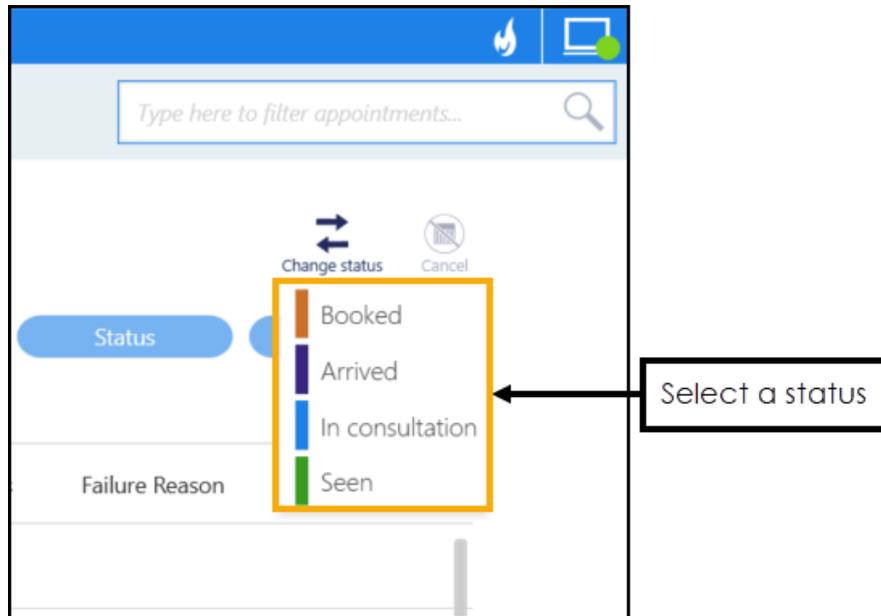
- **Edit** - Select **Edit**  to return to the previous screen and change the date range and filters.
- **Sort** - Select a column header to sort the appointments by the chosen header, for example select **Session Name** to sort the appointments by the session type. You can sort ascending or descending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

- **Cancel** - Select **Cancel**  to remove any selected appointments from the list.

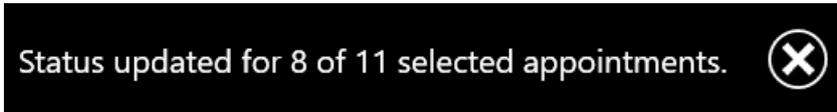
4. Tick to select individual appointments or tick **Select All** to select all the appointments in the list.



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:

Date/Time	Patient Name	NHS/CHI	Book Owner	Session Name	Slot Type	Duration	Status
28-Oct-2022 10:10	Booked 99903		Dr Frank Somerville	Normal Session	Normal	10 mins	
28-Oct-2022 10:20	Booked 99903		Shirley's Clinic	GP Connect	GP Connect	10 mins	

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.

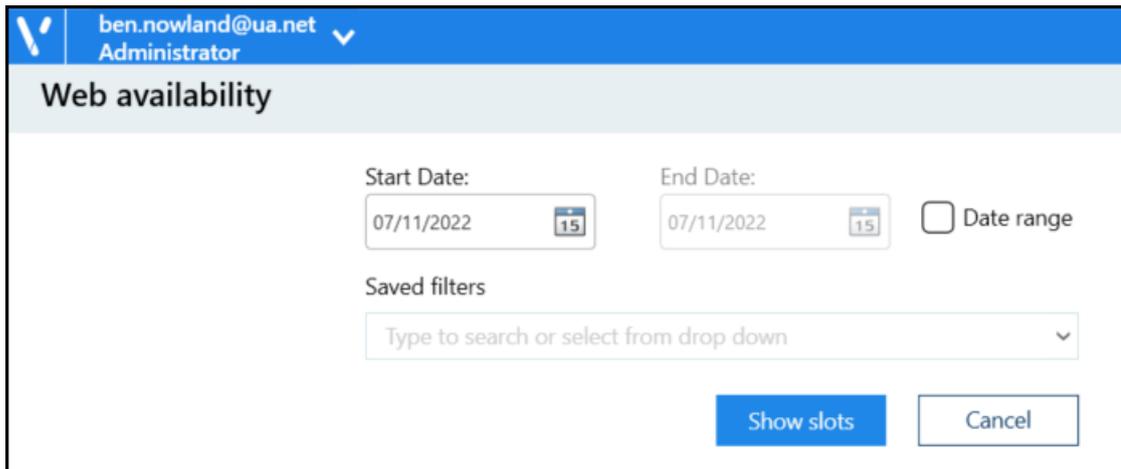
To bulk enable or disable online bookings:

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

The screenshot shows the appointment management interface. At the top, there is a toolbar with icons for a clipboard, calendar, weekly view, search, refresh, AM/PM, filter, and a more options icon. The 'More options' icon is highlighted with a yellow box and labeled 'Select Options'. A dropdown menu is open, listing various actions. The 'Bulk Updates' option is highlighted with a blue box and labeled 'Select Bulk Updates'. Below the main menu, there is a sub-menu with 'Record DNA onto clinical record', 'Review incomplete appointments', and 'Toggle web availability'. The 'Toggle web availability' option is highlighted with a yellow box and labeled 'Select Toggle web availability'.



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

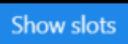


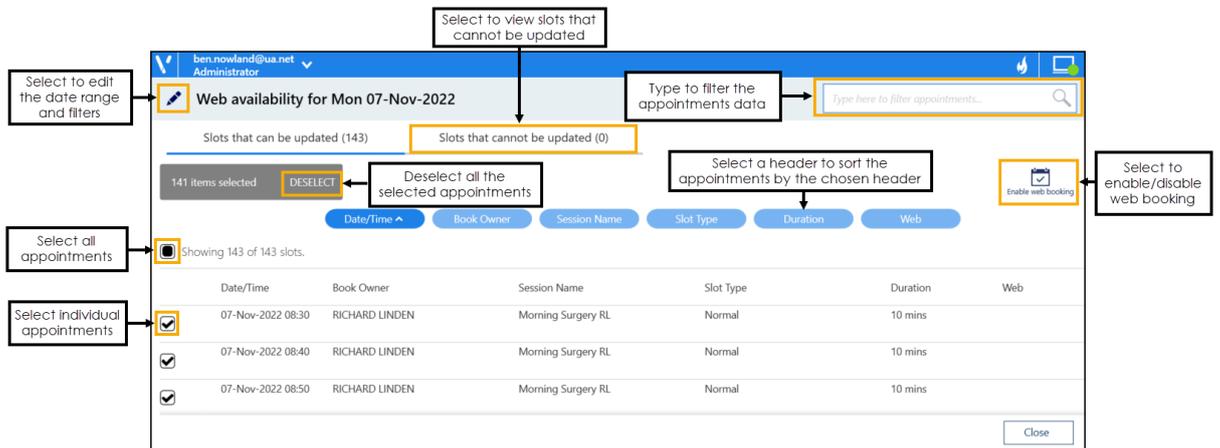
Complete as follows:

- **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** , 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:

Successfully enabled web booking for selected slots.





## 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:

ben.nowland@ua.net  
Administrator

Web availability from Wed 09-Nov-2022 to Wed 16-Nov-2022

Slots that can be updated (783)    Slots that cannot be updated (3)

Showing 3 slots that cannot be updated.

Date/Time	Book Owner	Session Name	Slot Type	Duration	Web
11-Nov-2022 15:45	MARIETTA MAPLE	Treatment Room PM	Treatment Room	15 mins	
11-Nov-2022 15:50	ALISON ROWAN	Afternoon Surgery AR	Normal	10 mins	
11-Nov-2022 16:50	BOB ASH	Afternoon Surgery BA	book on the day	10 mins	

Close

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.



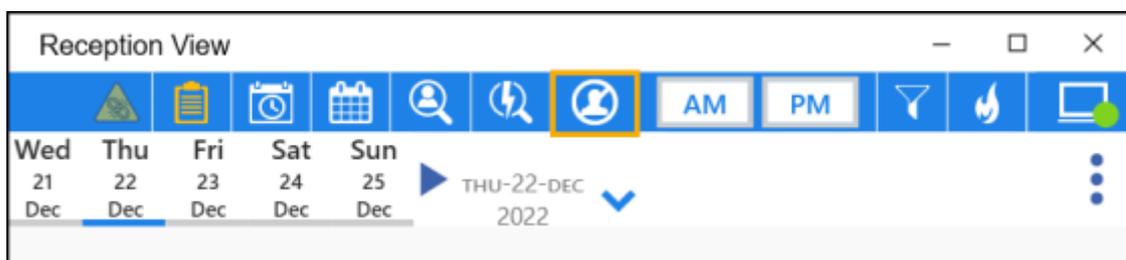
## Show Today's Free Slots

 **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:

Appointment for 'IBBITSON, Keith (Mr)' booked on 13 -Oct-2022 at 09:30 with 'Dr Venus'. 

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



# Appointments Restrictions

## Slot Type Restrictions

**i 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:

The screenshot shows the 'Reception' view for 'Test Practice 4' on Thursday, 31st March 2022. The interface includes a calendar navigation bar and a list of appointment slots. A tooltip is displayed over a slot at 16:30, indicating it is for 'Baby Immunisations' and that bookings are restricted to patients aged 1 year to 2 years (Ben test). The background shows slots for 'DAVID SATURN' (16:10, 16:20, 16:30) and 'Phlebotomy' (14:05, 14:10, 14:15, 14:20, 14:25) with associated patient names like MOBBS, Harry (Mr) and RAIT, Edwin (Mr).

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

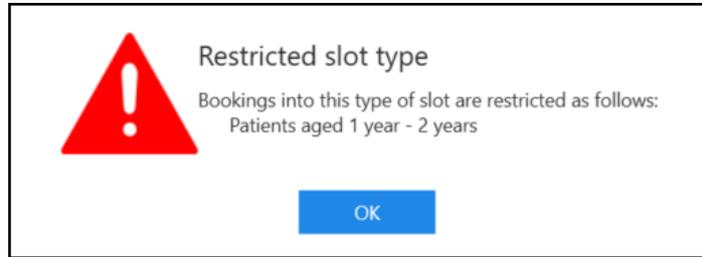
The screenshot shows the appointment booking form for 'Thursday 31st Mar 2022' at '16:30 - DAVID SATURN - Test Practice 4'. The appointment type is 'Baby Immunisations'. A yellow banner with a warning icon and the text 'Patients aged 1 year - 2 years' is displayed. Below the banner, there are fields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



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

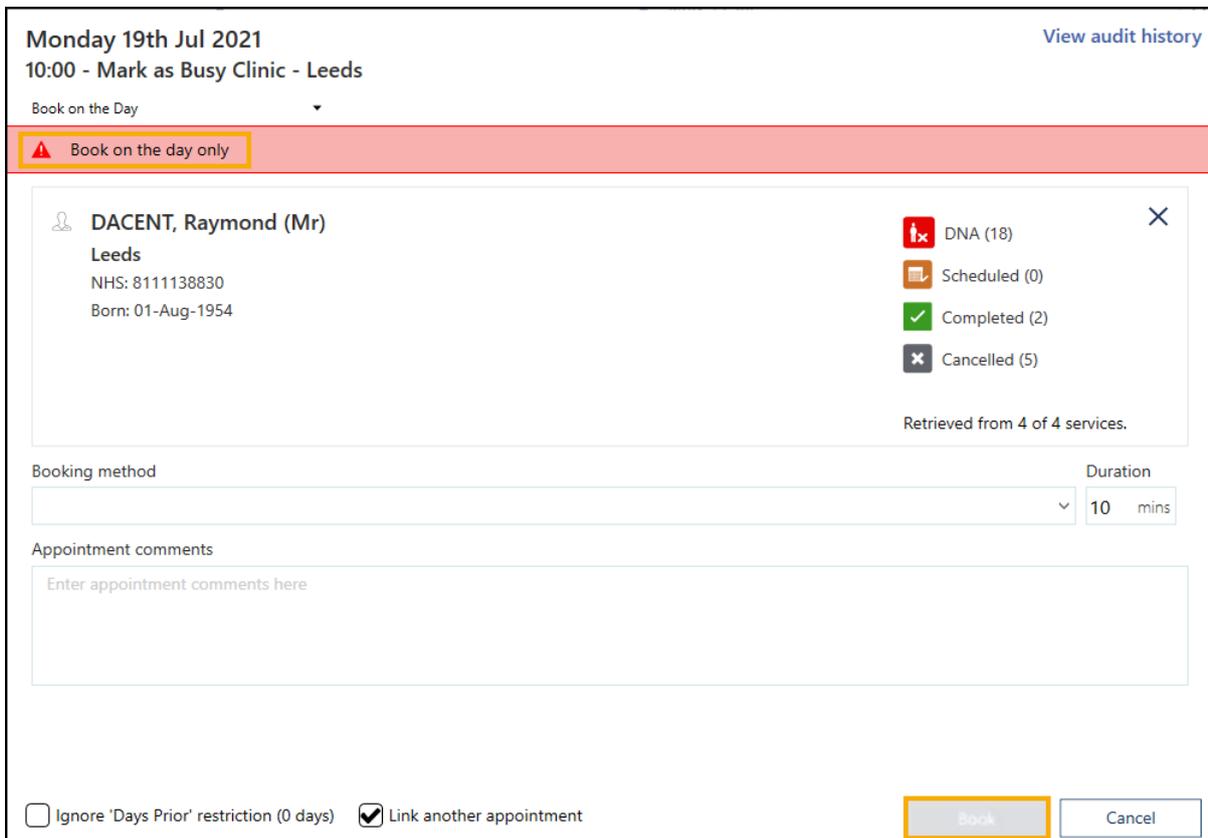


If you attempt to book an appointment for a patient who does not meet the specified restriction criteria, a warning displays and you cannot continue:



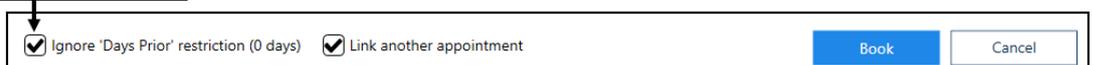
### 'Days Prior' Restriction

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:

Tick to ignore the restriction





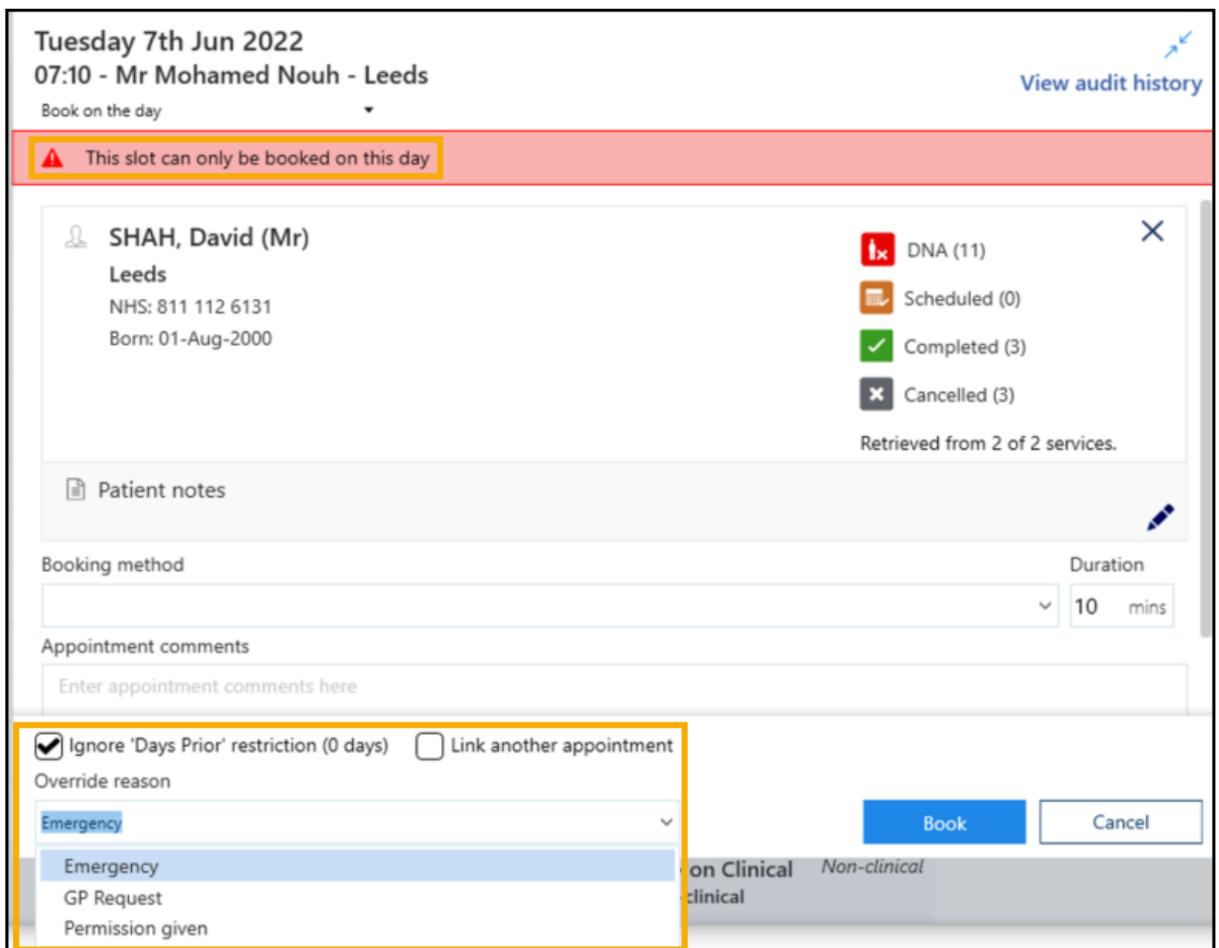
## Overriding a 'Days Prior' Restriction

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.

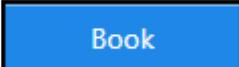
 **Note** - You are only prompted to add an **Override Reason** when one is set up in **Appointments Setup**. See [Adding Override Reasons](#) in the **Appointments Setup** Help Centre for more information.

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:



The screenshot shows the booking form for a slot on Tuesday 7th Jun 2022 at 07:10 for Mr Mohamed Nouh in Leeds. A red warning banner at the top states: "This slot can only be booked on this day". The patient's details are listed as SHAH, David (Mr), NHS: 811 112 6131, Born: 01-Aug-2000. The booking method is set to "Book on the day" and the duration is 10 mins. The appointment comments field is empty. At the bottom, the "Ignore 'Days Prior' restriction (0 days)" checkbox is checked, and the "Override reason" dropdown menu is open, showing "Emergency" as the selected option. Other options in the dropdown include "GP Request" and "Permission given". The "Book" button is highlighted with a blue box.

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 **SystemOne (TPP)** practice.

The **National Patient Search** facility allows you to find and book appointments for **SystemOne (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.

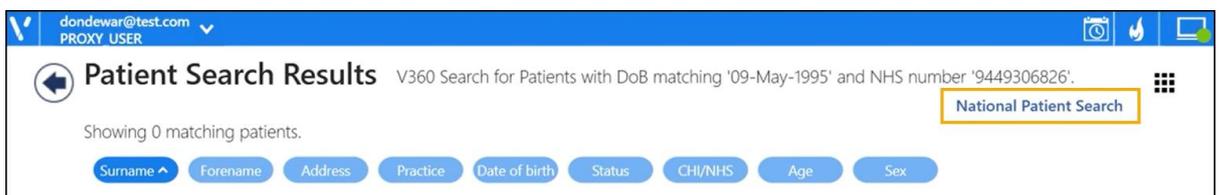
In a Shared Care Setting, the **Patient Search** option only searches for **Vision 3** and **EMIS** registered patients. If you have searched for a patient in the usual way and they cannot be found, you can use the **National Patient Search** facility to locate them.

To find a patient within your federation who is registered to a **SystemOne (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 **SystemOne (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**:





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

Search

Patient Search **Patient Search (Form)** Special Booking Search

Date of birth  /  /  ⓘ

NHS Number  e.g. 1234567890...

Family name  e.g. Smith, Jones...

Forename  e.g. Frank, Sarah...

Postcode  e.g. DD11 2NN...

Gender  Male  Female  Not specified  Not known

Search Cancel

**Enter at least one of the following combinations:**

- NHS number and date of birth
- Date of birth, family name and gender

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:

**This patient's details may be out of date**

The patient demographic details contained in this version of the patient record may be out of date. Please use the national patient search to find the most up to date details.

Open national patient search Cancel

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



**Patient NHS number has been superseded**

This patient's NHS number has been superseded. Please inform the patient (where possible) of this change to their personal demographics information.

New NHS Number: 9449310416

Close

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



**Failed to 'Search for patients nationally'.**

This patient's NHS Number could not be verified.

OK