

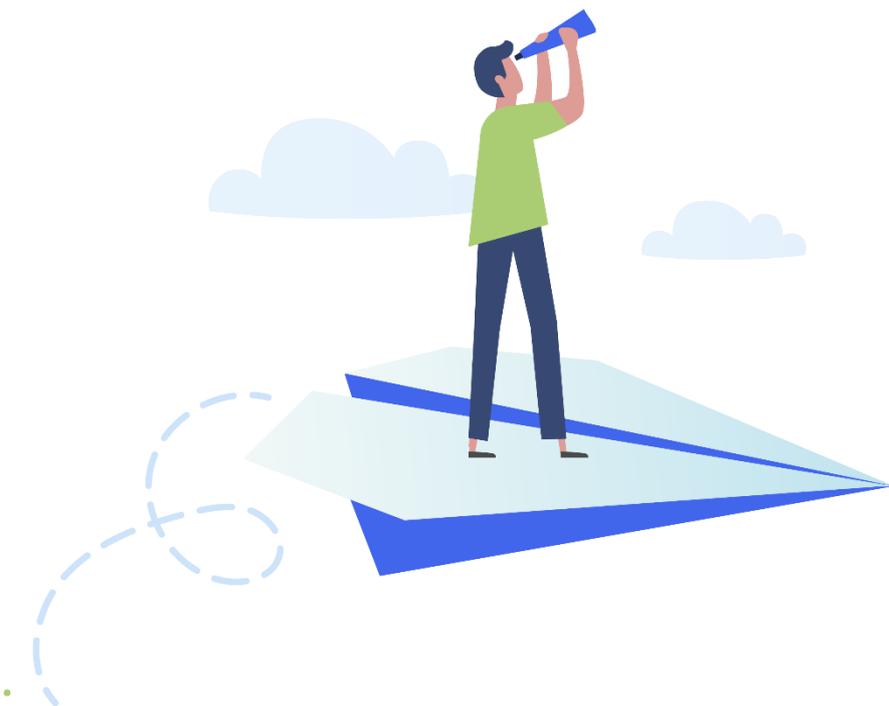


Appointments

Appointments Release 3.6

Version 1.0

18 December 2023





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Appointments Release 3.6

Appointments release **3.6** contains the following new features and improvements:

All Users

- **Booking Form** - A new Booking Form design displays the patient details and appointment history on the left-hand side of the Booking Form. Any patient notes, warnings or reminders also display here:

Tuesday 26th Sep 2023 - 11:00 [View audit history](#)

Dr Federated Locum - Dundee

⚠ Patient already has an appointment on this date.

YAPP, Adrian (Mr) ✕

Dundee

NHS:

Born: 03-May-1954

⚠ Warning

ℹ Reminders (1)

🛡 ONLINE REGISTRATION

❌ DNA (2)

📅 Scheduled (3)

✅ Completed (0)

❌ Cancelled (0)

Retrieved from 2 of 2 services.

📄 Patient notes ✎

Normal ▾

Booking method Duration

10 mins

Appointment comments

Link another appointment

Book + Print Book Cancel



- **Appointment Reports** - From the **Reception View** or **Weekly View** - **Options** , you can now select from a suite of pre-defined appointment reports:

Reports

Select a report

- Future booked appointments
- Future booked appointments
- Patient counts in time frame
- 3rd, 4th and 5th available appointments
- Utilisation and DNA rates
- Utilisation by booking method
- Staff utilisation and DNA rates
- Utilisation by patient age and sex
- Online appointment availability
- Online appointments booked



See [Appointment Reports](#) on page 9 for details.

- **Print Scheduled Appointments** - You can now print all future appointments booked for a patient from the **Scheduled Appointments** screen:

Scheduled Appointments

Enter text to filter results...

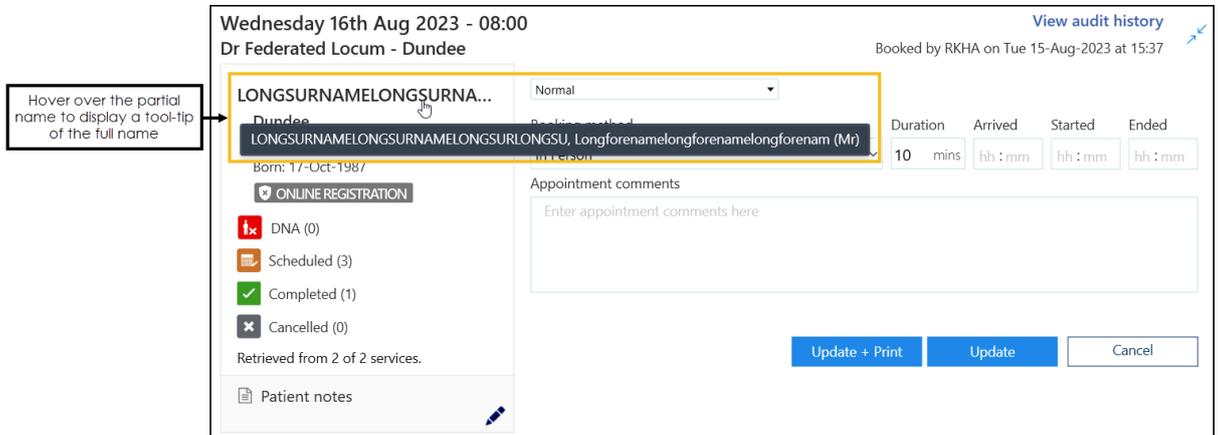
Type Date/Time ^ Book Owner Book Owner Sex
Slot Type Cancellation Reason Practice

Type	Date	Time	Book Owner	Slot Type	Comments / Cancellation Rea...
<input type="checkbox"/> Future	Wed 18-Oct-2023	16:45	Mr Nowland Ben V3-DUNDEE	book on the d...	
<input type="checkbox"/> Future	Fri 20-Oct-2023	16:30	Mr Nowland Ben V3-DUNDEE	Normal	

 Print all scheduled appointments



- Patient Name Display** - Long patient names no longer display in full on the booking form and other areas of **Appointments**. Where a name is truncated, three dots display next to the name to indicate part of the name is missing. Hover over the patient name to display the name in full:

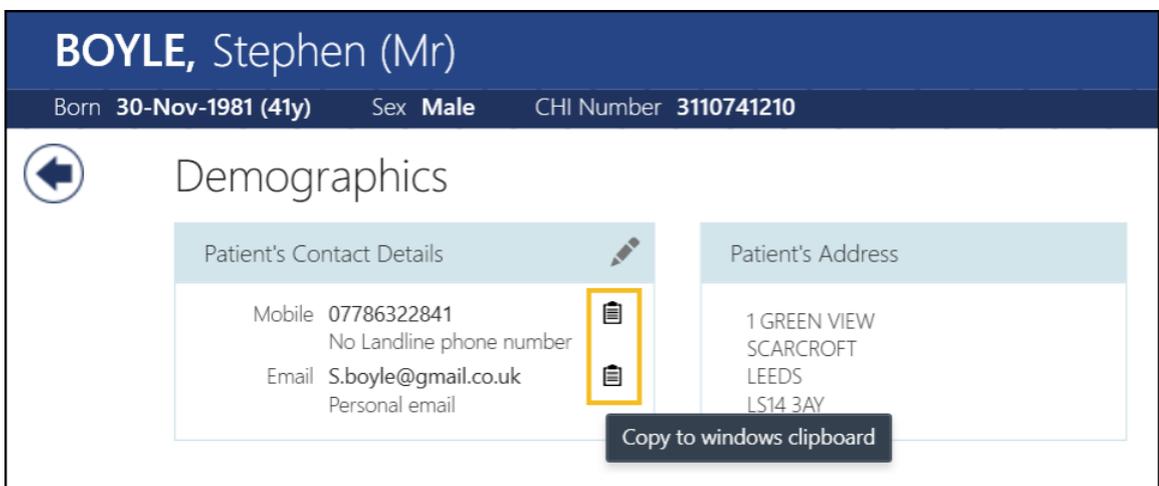


- Multi-select Toolbar** - The options on the multi-select toolbar now display truncated when selecting multiple slots in **Appointments** on a small screen, for example, a laptop:



Training Tip - Hover over a truncated multi-select toolbar option to display the full description.

- Patient Details View** - From the **Patient Details View** screen you can now copy **Patient's Contact Details** to your **Windows Clipboard** . You can then paste the details elsewhere if required:





- **Emergency Evacuation Report** - The **Session** and **Slot Type** details now print out on an **Emergency Evacuation Report**:

NHS CONFIDENTIAL

 Emergency Evacuation Report - 13-Oct-2023 at 15:35

V3-DUNDEE

JAMES BENNETT

Patients in waiting room

Patient/Special Booking Name	Session	Slot Type	Contact Details
BEN, Alan (Mr) - 03-Aug-1953 (70y)	Afternoon Surgery 6	Normal	

Patients in consultation

Patient/Special Booking Name	Session	Slot Type	Contact Details
BEN, Arthur (Mr) - 28-Mar-1987 (36y)	Afternoon Surgery 6	Normal	

- **Open Sessions** - You can no longer enable **Open Session** appointments for **Web Bookings**.

Desktop Users

- **Linked Appointments** - A warning message now displays if you try to book an appointment for a patient, before completing the linking of appointments for another patient. The *'You cannot select a patient for booking as another patient is currently selected and is being booked into LINKED APPOINTMENTS which are not complete. Please discard the selected patient or complete the linked appointments first'* message displays. Select **OK**, discard the selected patient and complete the **Linked appointment**:

Cannot select patient for booking

You cannot select a patient for booking as another patient is currently selected and is being booked into LINKED APPOINTMENTS which are not complete. Please discard the selected patient or complete the linked appointments first.



England Only

- **Exception Reasons** (This feature is dependent on **Vision 3** release **DLM 890**) - **Exception reasons** have been introduced to help differentiate between appointments that are intentionally booked outside of a two-week time frame, and appointments where patients have had to wait longer than two weeks. For example, a patient can actively request an appointment more than 14 days after the booked date, or a clinical interval exceeding 14 days maybe required:

Sunday 22nd Oct 2023 - 08:20
Dr Ben Nowland - LIVERPOOL

View audit history

GERALD, Arthur (Mr)
LIVERPOOL
NHS: 405 639 4695
Born: 16-Feb-1997
ONLINE REGISTRATION

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

Patient notes
Hard of hearing

Home Visit

Booking method

Duration
10 mins

Appointment comments
Enter appointment comments here

Exception reason(s)
2 exception reasons selected

- Patient preferred an Appointment on a future date or at a specific time
- Clinician requested follow-up Appointment after providing care or advice
- Patient preferred an Appointment with a specific clinician or Practice User
- Patient preferred an Appointment in a specific location

 See [Appointment Exception Reasons - England Only](#) on page 13 for details.

 See [Appointments Setup Release 3.6](#) in the **Appointments Setup Help Centre** for details about what is new in **Appointments Setup**.

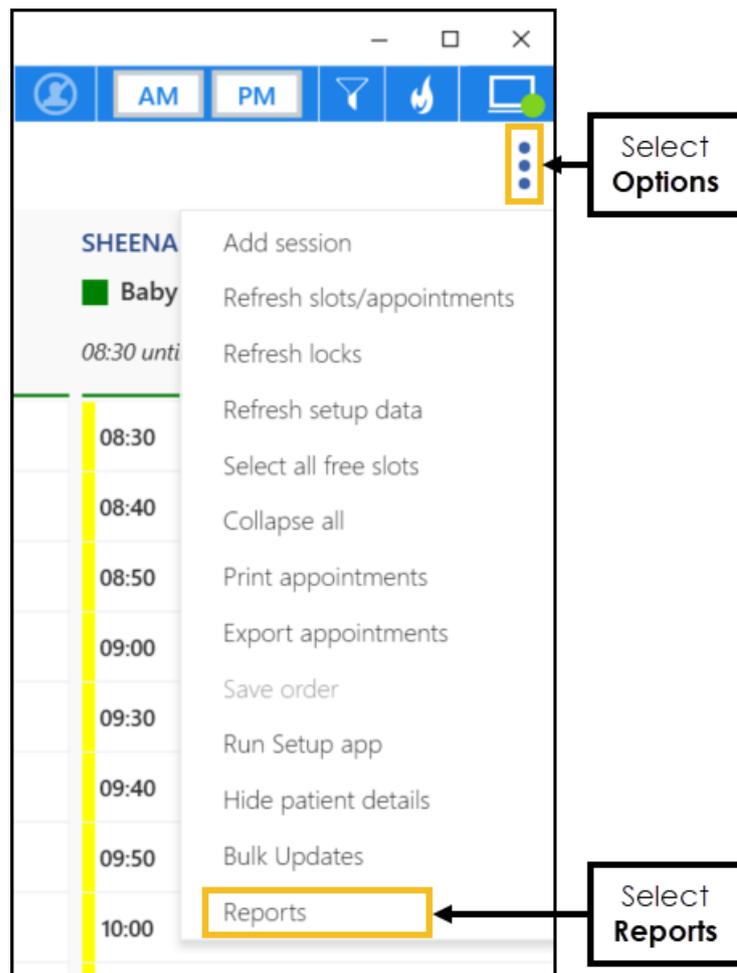


Appointment Reports

A suite of pre-defined reports to run directly from **Appointments** are available. These are designed to help you manage your appointments process.

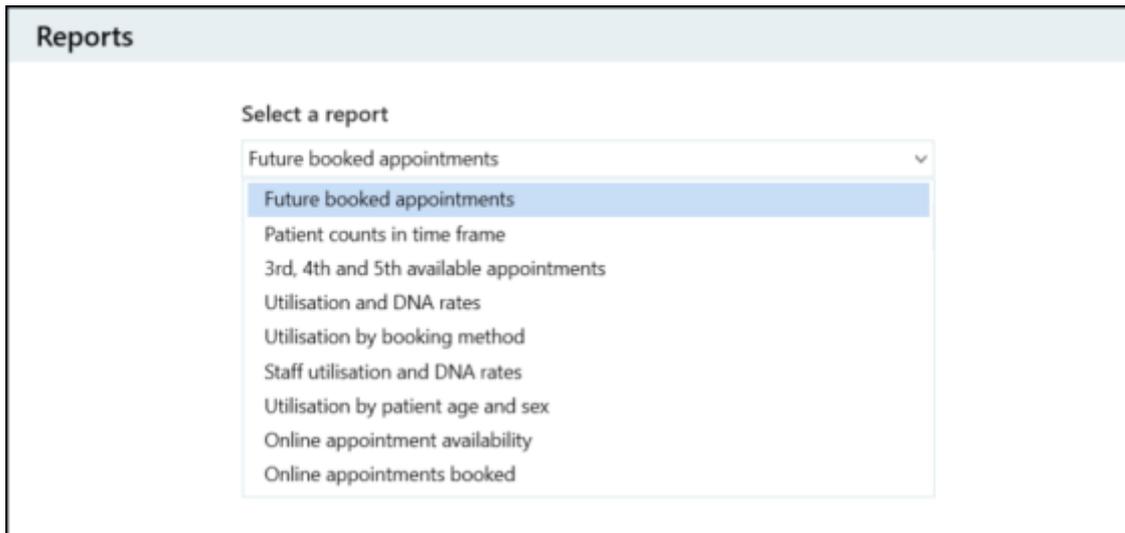
To select **Reports**:

1. From the **Reception View** or **Weekly View**, select **Options**  - **Reports**:





2. The **Reports** screen displays:



Select a report from the available list:

- **Future booked appointments**
- **Patient counts in time frame**
- **3rd, 4th and 5th available appointments**
- **Utilisation and DNA rates**
- **Utilisation by booking method**
- **Staff utilisation and DNA rates**
- **Utilisation by patient age and sex**
- **Online appointment availability**
- **Online appointments booked**



3. Choose **Select** Select to display the report criteria:

Future booked appointments - Select Report Criteria

Select date(s)

Start date: End date: Date range

*Please select a valid date or date range.
The start date must be today or a future date.
The end date must be later than the start date.
Any date range selected cannot exceed one calendar month.*

Include appointments from

V3-DUNDEE

Federated Appointments

LIVERPOOL Please add a saved filter if you wish to include only certain appointments

Complete as required:

- **Select date(s)** - Select a date or tick **Date range** to select a date range.



Note - You must select a valid date range. The date range criteria vary by report, however instructions display below the date range advising on the requirements for each report.

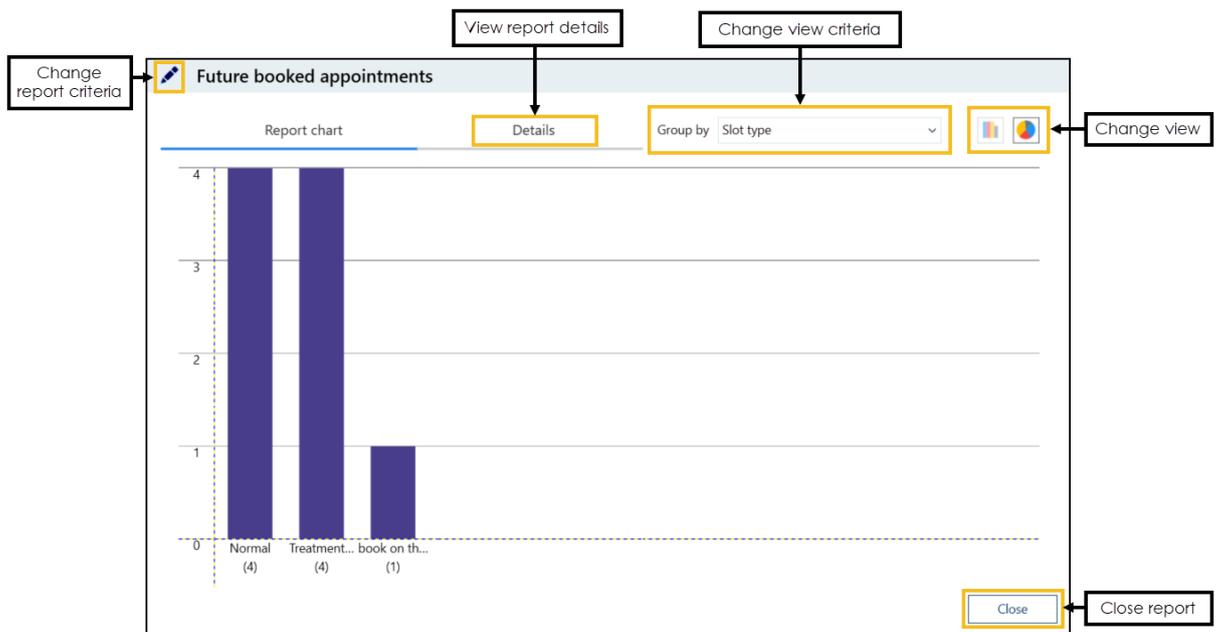
- **Include appointments from** - If you are in a shared care setting, select the organisations to include appointments data from.
- **Saved filters** - When you select an organisation, you can select an organisation specific appointment filter if required.

4. Select **View Report** View Report to run the report. The following options are also available:

- **Reset** - To reset the report criteria.
- **Back** - To return to the **Reports** screen.
- **Cancel** - To return to the **Reception View** or **Weekly View**.



5. The report displays:



The report data display and options vary by report, select from the following where appropriate:

- **Group by** - Select **Group By** to change the view criteria.
- **Change view**  - Select to view the report as a bar chart or pie chart.
- **Details** - Select to view the report details.
- **Change report criteria**  - Select to return to the previous screen and change the report criteria.
- **Copy details to windows clipboard**  - Select to copy the report details to the **Windows Clipboard**.
- **Export**  - Select to export the report to a PDF or CSV file.

6. Select **Close**  to close the report and return to the **Reception View** or **Weekly View**.



Appointment Exception Reasons - England Only

The **Investment and Impact Fund (IIF)** includes an indicator for 'Percentage of Patients who waited two weeks or less for an Appointment in General Practice'. The intention of this indicator is to reduce the percentage of patients who have to wait a long time for an appointment.

Exception reasons help differentiate between appointments that are intentionally booked outside of a two-week time frame, and appointments where patients have had to wait longer than two weeks. For example, a patient can actively request an appointment more than 14 days after the booked date, or a clinical interval exceeding 14 days maybe required.

Appointment Types

Exception reasons can only be entered when booking appointments that are more than 14 days after the booked date and are linked to one of the following **National Slot Categories NSC**:

- General Consultation Routine
- Home Visit
- Care Home Visit
- Care Related Encounter but does not fit into any other category



See [National Slot Categorisation](#) in the **Appointments Setup Help Centre** for details.



Selecting an Exception Reason

If you are selecting a slot that is linked to an appropriate **National Slot Category** and is more than 14 days after the booked date, on the booking form the option to select exception reasons displays:

Sunday 22nd Oct 2023 - 08:20
Dr Ben Nowland - LIVERPOOL

View audit history

GERALD, Arthur (Mr)
LIVERPOOL
NHS: 405 639 4695
Born: 16-Feb-1997

ONLINE REGISTRATION

DNA (0)
Scheduled (0)
Completed (0)
Cancelled (0)

Retrieved from 2 of 2 services.

Patient notes
Hard of hearing

Home Visit

Booking method

Duration
10 mins

Appointment comments
Enter appointment comments here

Exception reason(s)
Please select exception reason(s)

Book Cancel

Choose from one or more of the following exception reasons:

- Patient preferred an Appointment on a future date or at a specific time
- Clinician requested follow-up Appointment after providing care or advice
- Patient preferred an Appointment with a specific clinician or Practice User
- Patient preferred an Appointment in a specific location



You can select multiple exception reasons. The number of exception reasons displays when selecting more than one:

Sunday 22nd Oct 2023 - 08:20
Dr Ben Nowland - LIVERPOOL

View audit history

GERALD, Arthur (Mr)
LIVERPOOL
NHS: 405 639 4695
Born: 16-Feb-1997

ONLINE REGISTRATION

DNA (0)
Scheduled (0)
Completed (0)
Cancelled (0)

Retrieved from 2 of 2 services.

Patient notes
Hard of hearing

Home Visit

Booking method

Duration 10 mins

Appointment comments

Enter appointment comments here

Exception reason(s)

2 exception reasons selected

- Patient preferred an Appointment on a future date or at a specific time
- Clinician requested follow-up Appointment after providing care or advice
- Patient preferred an Appointment with a specific clinician or Practice User
- Patient preferred an Appointment in a specific location

Merging Appointments

When merging appointments the option to select exception reasons only displays when merging appointments, if the earliest slot is linked to an appropriate **National Slot Category** for exception reasons. If the earliest slot is not linked to an appropriate **National Slot Category**, but a later slot is, when merging the slots and booking an appointment, there is no prompt to choose an exception reason.

Booking Multiple Appointments

When booking multiple appointments for the same patient, if one slot is linked to an appropriate **National Slot Category** for exception reasons but another is not, you are prompted to choose an exception reason. The exception reason only records in the slot audit trail of the relevant slot.

Special Bookings

Exception reasons are only available for patients registered at the practice, they are therefore not available for **Special Bookings**.

Rescheduling Appointments

If you need to reschedule an appointment to a time that is more than two weeks away, it is recommended that you cancel the existing appointment, make a new one and choose an exception reason. This helps prevent any issues with the calculation of IIF payments for the appointment.