

Joint Appointments Quick Reference Guide

Joint Appointments Prerequisites

The following are the minimum requirements for Joint Appointments:

- **Appointments** release **3.4**.
- For **Vision 3** practices you must be on a minimum release of **DLM860**.

Booking Joint Appointments

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

From **Appointments** you can book joint appointments within a specified time frame with one or more clinicians. For example, an appointment with a doctor and another appointment with a nurse either at the same time or within a specified time frame set up in **Preferences - General**. This joins the appointments so that if you update one of the appointments the other updates automatically.

 See **Updating and Cancelling Joint Appointments** on page **4** for more details.





Joint appointments can be booked from either:

Reception/Weekly View

To book and join appointments from the **Reception/Weekly View**:

1. From the **Reception View** or **Weekly View**, right click on each of the free slots you want to book and join:

Dr Saturn	Dr Venus
AM Surgery. GP 09:10 until 09:40	AM Surgery. GP 09:00 until 11:40
09:10	09:00
09:20	09:10
09:30	09:20



Note - You can join appointments across multiple clinicians or clinics, providing they are within the specified time frame set up in **Preferences - General**.

2. The toolbar at the top of the screen activates:



3. Select **Book appointments**  and the **Booking form** displays:

Monday 5th Sep 2022
09:10 - Dr Saturn - Test Practice 4 + 1 slot

Telephone Slot

Special Booking

Patient search
Search for a patient...

Booking method: OTHER | Duration: 5 mins

Appointment comments
Enter appointment comments here

Ignore Days/Hours Prior restrictions | Link another appointment | Book | Cancel

View audit history



4. Search for a patient and complete the booking details as required.

5. Select **Book** 

Free slot search

To book and join appointments from the **Free slot search** screen:

 **Note** - Joint appointments can only be booked from the **Free slot search** screen when **List** format is set in **Preferences - Display Options**.

1. From the toolbar at the top of your screen, select **Free slot search** 
2. The **Free slot search** screen displays, listing available appointments:



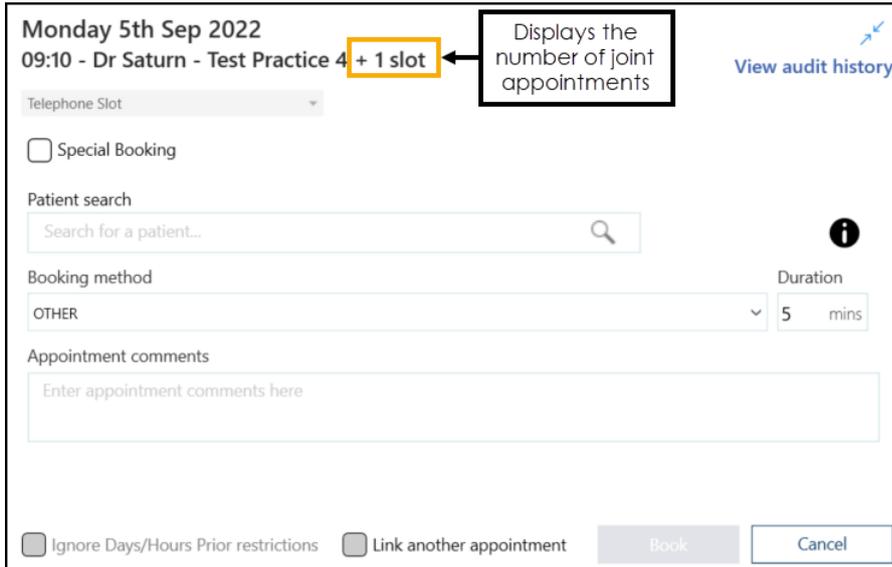
The screenshot shows the 'Free slot search' interface. At the top, there are filters for 'Duration (mins)' set to 'Any', and buttons for 'AM' and 'PM'. Below these are icons for 'Book appointments', 'Book and link appointments', and 'Deselect All'. A pagination indicator shows 'Page 1 / 5'. The main area is a table with columns: 'Owner', 'Session', and 'Session additional info'. There are six rows of appointments, each with a checkbox on the left. The first two rows are checked. At the bottom left, a grey box says '2 items selected'. At the bottom right, there is a blue 'Close' button.

	Owner	Session	Session additional info
<input checked="" type="checkbox"/>	08:50 Shirley M Anderson	COVID Report	10 mins
<input checked="" type="checkbox"/>	09:10 Shirley M Anderson	COVID Report	10 mins
<input type="checkbox"/>	09:50 Shirley M Anderson	COVID Report	10 mins
<input type="checkbox"/>	10:00 Alison Rowan	Regression	15 mins
<input type="checkbox"/>	10:00 Mark As Busy Clinic	Clinical Pharmacist	10 mins
<input type="checkbox"/>	10:10 Mark As Busy Clinic	Clinical Pharmacist	10 mins

3. Place a tick next to the required slots and select **Book appointments**



, the **Booking form** displays:



The screenshot shows the 'Booking form' for 'Monday 5th Sep 2022' at '09:10 - Dr Saturn - Test Practice'. A yellow box highlights '+ 1 slot' next to the appointment name, with a callout box stating 'Displays the number of joint appointments'. The form includes a 'Telephone Slot' dropdown, a 'Special Booking' checkbox, a 'Patient search' field, a 'Booking method' dropdown set to 'OTHER', and a 'Duration' dropdown set to '5 mins'. There is an 'Appointment comments' text area. At the bottom, there are checkboxes for 'Ignore Days/Hours Prior restrictions' and 'Link another appointment', along with 'Book' and 'Cancel' buttons.

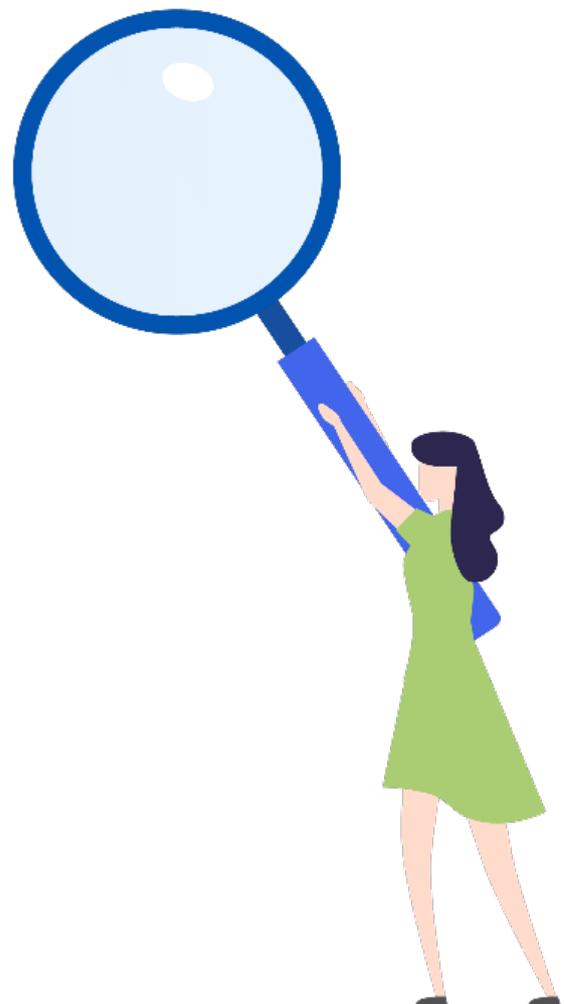
 **Note** - **Book appointments** is only available when you select more than one slot.



4. Search for a patient and complete the booking details as required.

5. Select **Book** .

 **Note** - You can join appointments across multiple clinicians or clinics, providing they are within the specified time frame set up in **Preferences - General**.





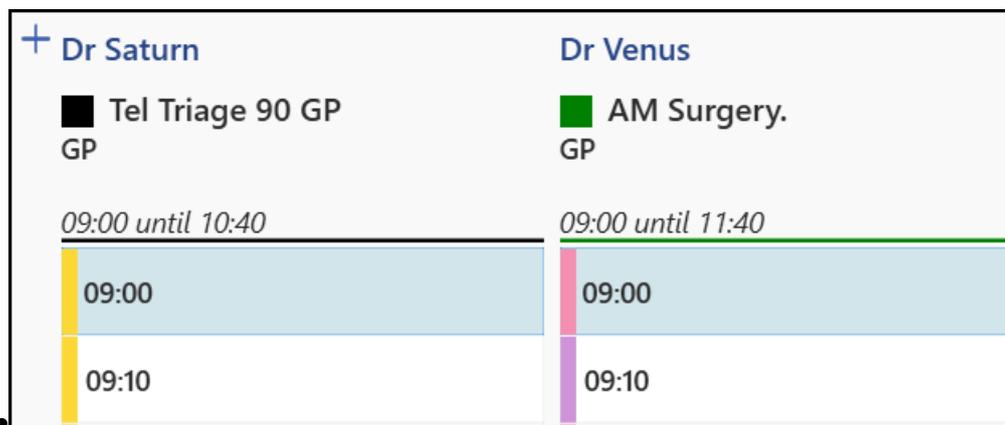
Updating and Cancelling Joint Appointments

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

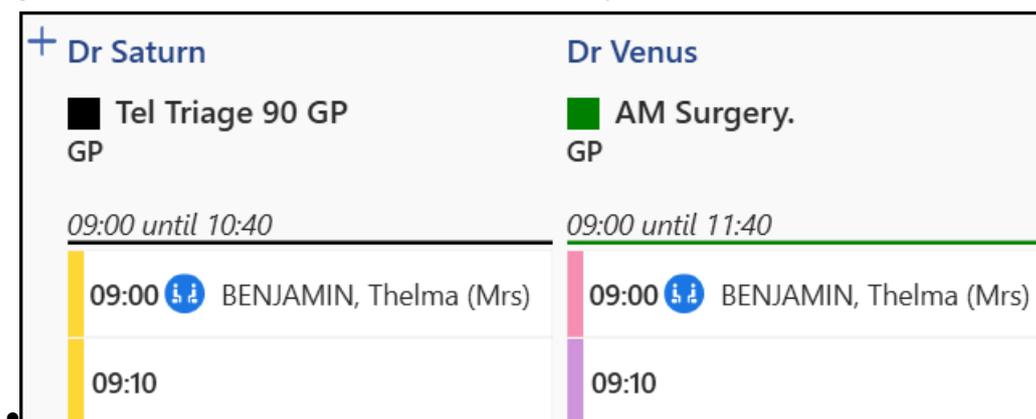
Updating a Joint Appointment Status

Concurrent Joint Appointments

Concurrent joint appointments are those that occur at the same time as one another, but are booked for multiple clinicians or clinics:



When a joint appointment status changes the status updates accordingly for all the joint appointments in the set. The status of any concurrent joint appointment updates automatically to match the new status, for example, changing the status of one joint appointment from **Booked** to **Arrived** changes the status of the other concurrent joint appointment to **Arrived**:

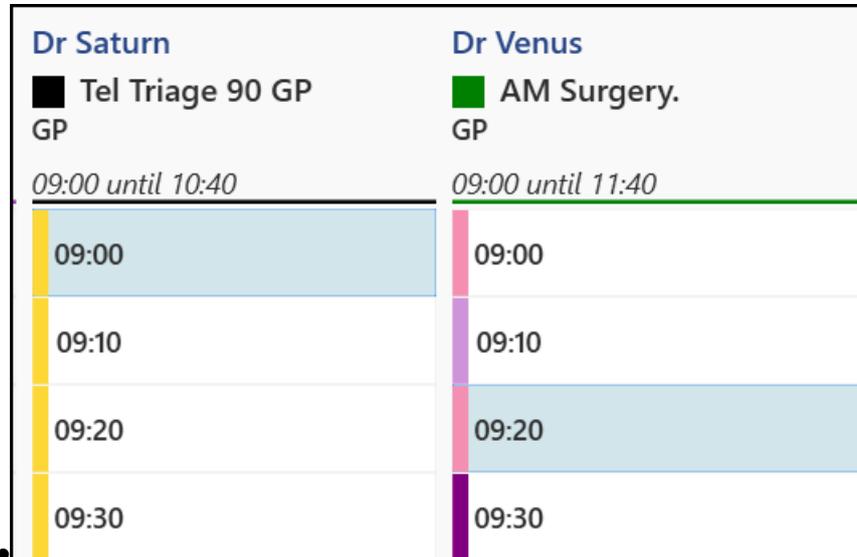


Reverting the status of a concurrent joint appointment also automatically updates the set to match, for example, if a patient was set to **Arrived** by mistake and reverted to **Booked**, the other concurrent joint appointments also revert back to **Booked**.



Non-concurrent Joint Appointments

Non-concurrent joint appointments can be booked across multiple clinicians or clinics and occur at different times to one another, but within a specified time frame set up in **Preferences - General**:



Non-concurrent joint appointments only update when a status is changed to **Arrived** as detailed below:

- From **Booked** to **Arrived** updates the status of the non-concurrent joint appointments to the new status.
- From **Arrived** to **In consultation** does not update the status of the other non-concurrent joint appointments.
- From **In consultation** to **Complete** does not update the status of the other non-concurrent joint appointments.
- From **Complete** to **In consultation** does not update the status of the other non-concurrent joint appointments.

For example, a patient arrives for a set of joint appointments, first with a GP at 9:00 and then a nurse at 9:20. When the status of the GP appointment is set to **Arrived**, the appointment with the nurse also displays as **Arrived**. However when the GP appointment is set to **In consultation** the appointment with the nurse remains as **Arrived** until the status is set separately.

Cancelling Joint Appointments

 **Note** - You can only cancel joint appointments with a status of **Booked** or **Arrived**.

To cancel a single or multiple joint appointments in either the **Reception View** or the **Weekly View** screens:

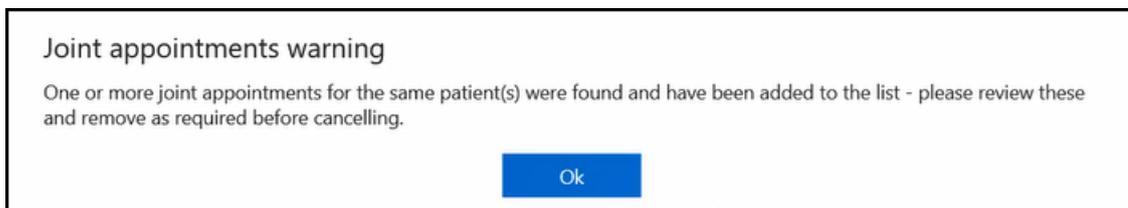
1. Right click on the joint appointment(s) you want to cancel to highlight them:



2. The toolbar activates at the top of the screen, select **Cancel** :



3. A warning message displays advising there are one or more joint appointments for the same patient. Select **Ok**  to review the joint appointments before cancelling:



4. The **Cancel this appointment?** screen displays the joint appointment to cancel and any other joint appointments in the set:

Cancel this appointment?

You have selected the following appointment(s) to cancel:

Thu	08:30	VALKIRA, Barbara (Ms)	NHS: 8111153163	✕
05-May	AROW	Leeds	Born: 01-Aug-1974	
			Duration: 10 mins	

Potential joint appointment(s) to review:

Thu	08:30	VALKIRA, Barbara (Ms)	NHS: 8111153163	✕
05-May	SHERI	Leeds	Born: 01-Aug-1974	
			Duration: 10 mins	
CLICK HERE TO KEEP THIS APPOINTMENT				
Thu	08:40	VALKIRA, Barbara (Ms)	NHS: 8111153163	✕
05-May	AROW	Leeds	Born: 01-Aug-1974	

Select cancellation reason

Default 2 ▼

Select **CLICK HERE TO KEEP THIS APPOINTMENT**

Select **Yes** to cancel the appointments

 **Note - Completed** and **In consultation** joint appointments do not display in the list as they cannot be cancelled.

Complete as required:

- a. Select **CLICK HERE TO KEEP THIS APPOINTMENT** remove a joint appointment from the list of appointments on the **Cancel this appointment?** screen. All appointments left on the screen will be cancelled.
 - b. Select the reason for the cancellation from the **Select cancellation reason** list.
5. Select **Yes** to confirm and the selected appointment slot(s) are cancelled.

