Frequently Asked Questions

## Navigating Appointments

What are all the different Appointment views for?

- **Reception View** - Detailed view of all the clinician's appointments by session.
- **Current appointments view** - All booked appointment slots within the next hour, waiting patients, patients in consultation and DNAs from the previous hour.
- **Dashboard** - High level view of appointment activity across your entire practice for a day.
- **Patient view** - Displays demographics, appointment details and recall information for the selected patient.
- **Weekly view** - Displays clinicians and clinics scheduled for the week and allows you to easily add a session.

❓ How do I navigate to the different views?

The main toolbar gives access to the different views:
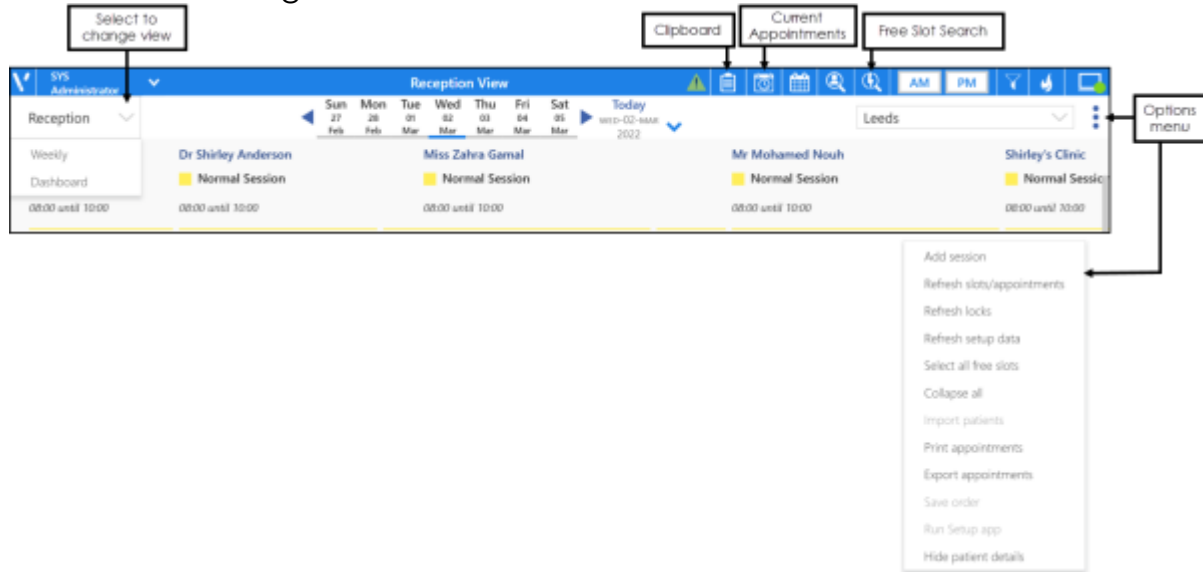
✏️ **Note** - When moving between the **Reception** and **Dashboard** views the date is maintained. **Current Appointments** always open on today.

❓ How do I see an overview of all sessions at my practice today?

- To see a high level view of activity select the **Dashboard**.
- For a more detailed view, select the **Reception** screen.

❓ Why does the system say Local practice?

Local practice indicates these are settings and views relating to your practice.

❓ How can I get further help on the new Appointments app?

We offer a suite of free eLearning courses on the **Learning Zone**. These eLearning courses are designed to help you become an expert user in our exciting new apps.

➡️ See https://learningzone.cegedimrx.co.uk to register.

Appointments Today

How do I mark a patient as arrived?

To mark a patient as arrived:

From the **Reception** or **Current Appointments screen**, simply select the **Booked** status, this changes the status to **Arrived**.

Note - If you have Self Check-in screens the appointment status updates automatically when your patients check in.

I have accidentally marked a patient as arrived. How do I change it back to 'booked'?

Right click on the appointment, select **Change status - Booked**.

Can I just view GPs and Nurses without scrolling in Reception View?

You can set filters to define the information that displays on your screen.

See **Applying or Editing Filters** for more details.

Booking Appointments

How do I filter/search the appointments views by specific clinicians?

Select the **Filter** from either the **Reception**, **Current Appointments** or **Free slot search** screens and then select by clinicians, clinics, sessions, slot types, gender and languages. You can then save your selection for quick use another time.

How do I know if the filter is applied to my appointments view?

- When a filter is applied, **Filter** displays orange.

- Hover your mouse over **Filter** to see the filter details.
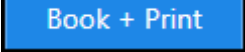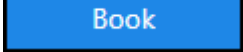- Select **Filter - Clear** to clear a filter.

How do I quickly search for available appointments slots?

Select **Free slot search**, to return available slots.

How do I book an Appointment?

1. Select a free slot in any screen.
2. The **Booking Form** displays.
3. Search for the patient, see **Patient Search Criteria** for details.
4. Select the patient from the list.
5. Select either **Book + Print** [Book + Print] or **Book** [Book].

Can I book an Appointment for a non-Registered patient?

Yes, you can make a **Special Booking** for someone who is not registered, simply tick **Special Booking** from the booking form.

How do I know if a patient already has a booked appointment today?

When booking an appointment for today, if a patient already has an appointment today, a message displays on the **Booking Form** advising '**Patient already has an appointment on this date**'.

Training Tip - You can also access the **Patient Details View** to check a patient's current and past appointments.

What criteria can I use to search for a patient when booking an appointment?

You can search by surname, forename and date of birth combinations.

How do I tell the difference between booked special bookings and normal appointment bookings?

A special booking displays with a blue star [★] to the right of the patient name.

Can I Insert slots?

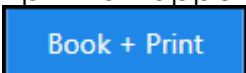Yes, you can insert additional slot(s) in the **Reception** or **Weekly Views**.

See **Inserting Slots** for details.

Can I print an Appointment label/reminder card to give to the patient?

Yes, you can print an appointment label from the **Booking Form**, simply select

Book + Print [Book + Print].

Can I change the slot types of appointments?

Yes, you can change the slot type from the **Reception** and **Current appointments** screens for single or multiple appointments. The slot type can also be changed in the **Booking Form**.

See **Change Slot Types** and **Making an Appointment** for details.

Can I search by slot duration?

Yes, the **Free slot search** lets you find slots by duration.

See **Using the Free Slot Search** for details.

When you extend books how can you block off all sessions so that reception can't book them and then reopen at the beginning of week?

You can mark all appointments as unavailable when creating sessions in **Appointments Setup**, thereby negating the need to block off all slots after you extend the books. If it is necessary to hold slots after the books are extended this can be done from **Appointments** by selecting the relevant slots and using the **Hold Slot** option on the toolbar.

Note - You must have System Administration rights to be able to release held slots.

Sessions

How do you edit a session that is already extended?

A session which had already been added using 'Extend Books' can be edited from **Appointments**.

See **Editing an Appointment** for more details.

Patient Related Appointments Tasks

How do I quickly search for a patient's appointments record?
The **Patient Details View** displays the patient's appointment record.

See **Accessing Patient View** and **Patient View - Overview** for details.

How do I access next of kin or carer information?
The **Patient View** includes:

- Patient's Next of kin
- Carers the patient has
- Any patients cared for by the patient

Note - Patient details are for information only. Patient details can be updated from the **Registration** module in **Vision 3**.

How do I change the duration of an appointment?
The duration of an appointment can be changed from the **Booking Form**, at any stage, simply enter a new **Duration**.

Move and Cancel Appointments

How do I move an appointment?
To move an appointment from the **Reception View**, you can simply drag and drop the appointment into a new slot or right click the appointment and

select **Move via clipboard** [Move via clipboard].

How do I cancel an appointment?

1. Right click on the appointment(s) you want to cancel.

2. Select **Cancel** [Cancel].

3. Choose a **Cancellation reason** from the drop down list.

4. Select **Save**.

❓ Can I hold and release slots?

Yes, users with Administration rights can hold and release slots.

❓ How do I copy appointments?

To copy an appointment in the **Reception View**:

1. Right click on the slot to display the toolbar.

2. Select **Copy to clipboard** and the appointment copies to the clipboard.

3. Select the **Clipboard** .

4. Find a free slot, you can simply drag and drop the appointment into the new slot from the clipboard.

❓ Will we still have the same issue when updating the book, or people over saving and then losing all our changes?

The audit history of a slot can now be viewed to ascertain what has happened to the slot.
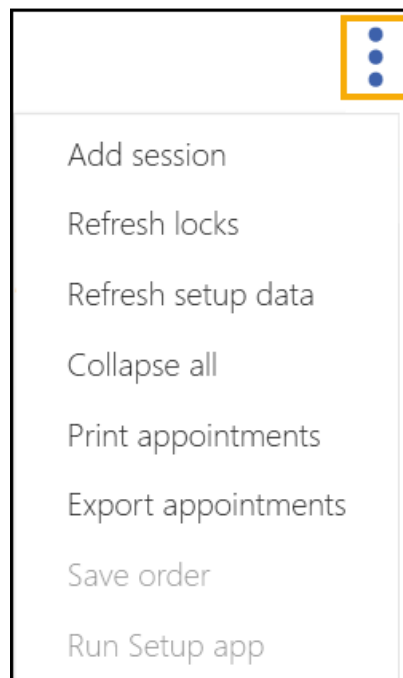
Troubleshooting

❓ **A warning banner displays 'One or more Slot type does not have a valid National Slot Category - Please update the Slot type 'mappings'.' - what do I need to do?**

For English practices only - One or more of your Slot Types are not mapped to a National Slot Category, see National Slot Categorisation in **Appointments Setup** for more details.

❓ **A slot is showing as locked, is there anything I can do?**

From the **Reception** screen, select **Options - Refresh locks**, to clear slots that incorrectly display as locked:

⋮

Add session

Refresh locks

Refresh setup data

Collapse all

Print appointments

Export appointments

Save order

Run Setup app

❓ **Why are there no appointment slots past a specific date?**

If you cannot see appointment slots past a specific date it means your appointment books have not been extended that far ahead.

➡️ See Extend Books for users of **Appointments Setup**.

➡️ See Extend Books for users of **Vision 3 Appointments**.

 Why can I see some clinician's appointments but not others?

Appointments allows you to filter your view, if **Filter** is orange it means you have a filter applied, and you are only viewing specific slots.

To clear the filter, select **Filter** and then **Clear** .

 My screen says something went wrong and Appointments has gone offline. What do I do?

Appointments relies on an internet connection.

When the status is green you are connected to the internet, when it is red it indicates disconnection.

A message displays '**Something went wrong - the app has gone offline. You can still use it to view information, but no changes will be saved**':
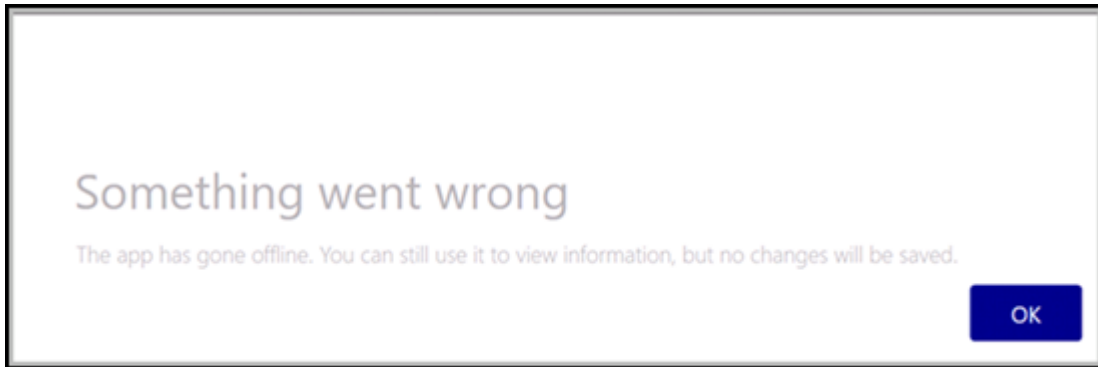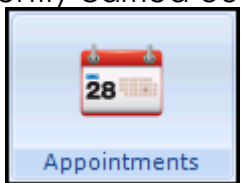

 How do I change my practice and personal settings in appointments?
These settings are maintained in the **Preferences** settings.

 Can I back up my Appointments data?
Yes, this is currently carried out in **Vision 3** but only for users with **Vision 3**

Appointments .
You can choose to export your **Appointments lists** to either PDF (printable) or CSV (Microsoft Excel) format.

How do I book Events in Appointments?

Events, for example, Bank Holidays and annual leave are currently created and maintained in the **Vision 3 Control Panel - Actions**.

See [Creating Events for Appointments Setup](#) for more details (opens in the **Appointments Setup** help centre).