Appointments

Appointments Setup Release 3.1

Version 1.1

08 April 2021

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Healthcare Solutions
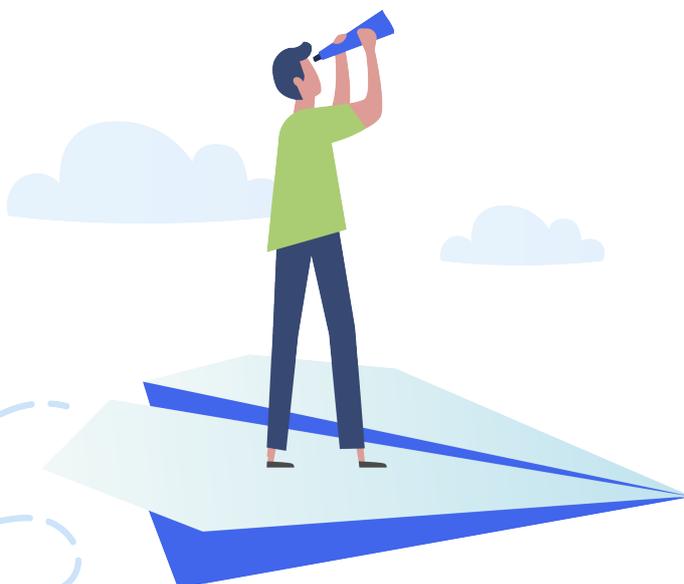
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Table of Contents

Appointments Setup Release 3.1

Appointments Setup release **3.1** contains the following new features and improvements:

- **National Slot Categorisation** - In **England** National Slot Categorisation is being introduced by NHS Digital, to align the slot types in **Appointments Setup** with an agreed set of national slot categories. You are required to map all slot types to a national slot category.

    Important - Only available to users on release DLM 800 or later.

    See **National Slot Categorisation - England Only on page 6** for more information.

- **SMS Messages** - This release introduces the ability to automatically send SMS (text) messages, from **Appointments**, to patients, keeping them advised of any appointment bookings, updates or cancellations.

    See **SMS Messaging on page 16** for more information on using **SMS Messaging** in **Appointments Setup**.

    See SMS Messaging for more information on using **SMS Messaging** in **Appointments**.

- **Sessions** - Session names can now be a maximum of 20 characters, and you can add a description of up to an additional 30 characters. This additional information displays fully in a tooltip when viewing a session in the **Reception View**:
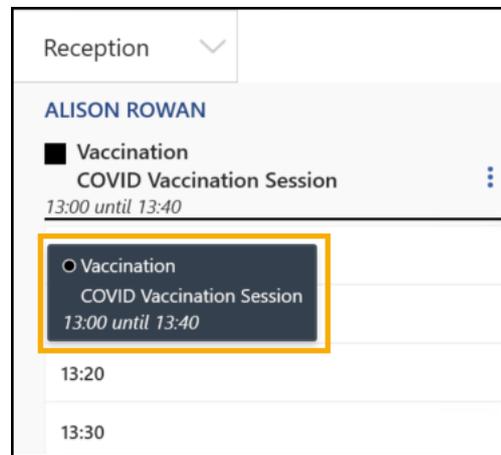
![arrow icon] See **Creating a Session** for more information.

National Slot Categorisation - England Only

National Slot Categorisation is a requirement from NHS England to align the slot types in use in your **Appointments** system with an agreed set of national slot categories. You are required to map all slot types to a national slot category.

To assist in mapping your **Slot Types**, there are now four options under **Slot Types** in the **Appointments Setup menu**:

- **Slot Types – Practice on the facing page**

- **Slot Types – National on page 9**

- **Slot Types – Mapping on page 10**

- **Slot Types – Import on page 13**

Until you map your **Slot Types** to valid **National Slot Categories** the following message displays "*One or more Slot type does not have a valid National Slot Category - Please update the Slot type 'mappings'.*" when category mapping is required:

V'	DR. MEDICAL OFFICER MOD-LOSSIEMOUTH	Vision Appointments Setup	🖥
⚠	One or more Slot type does not have a valid National Slot Category - please update the Slot type 'mappings'.		
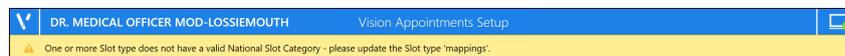
✏ **Note** - This will not stop you using existing slot types however on creation slot types need to be mapped to a category.

National Slot Categories are maintained by NHS Digital and are updated periodically. When categories are added, updated or inactivated you receive a file to import.

Slot Types – Practice

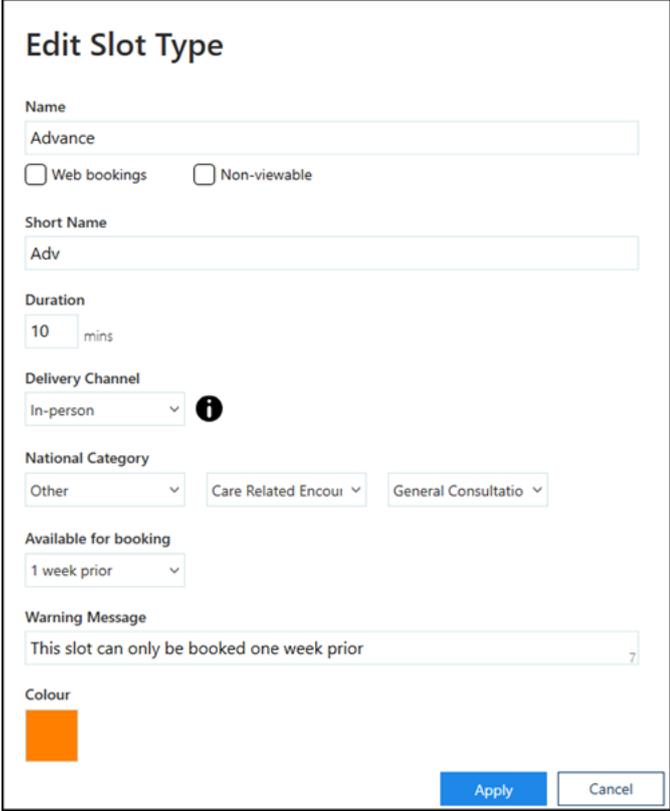Select **Slot Types** - **Practice** to add, view and edit **Slot Types**:
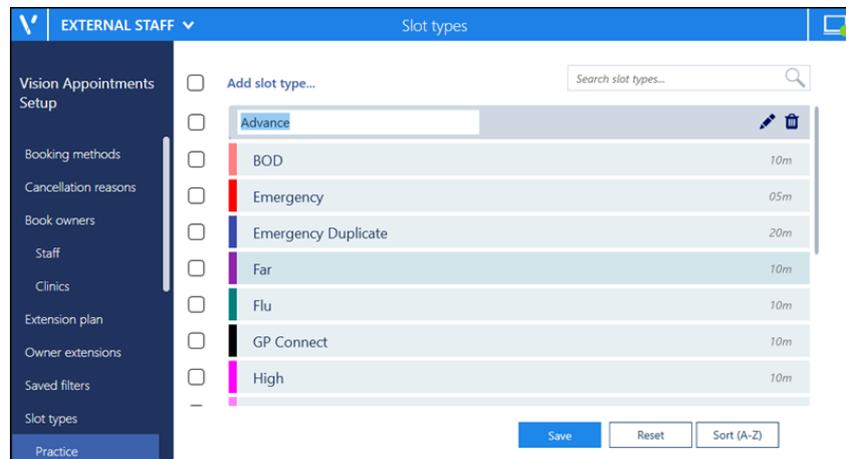
> ℹ️ **Important** - To facilitate reporting on vaccination appointments any
> COVID vaccination appointment slots should have a **Slot Type** of
> *COVID VACS*. This is essential for England however it is
> recommended to use elsewhere to help manage your appointment
> books. See **Slot Types Overview** for more information.

Adding a National Category to a Slot Type

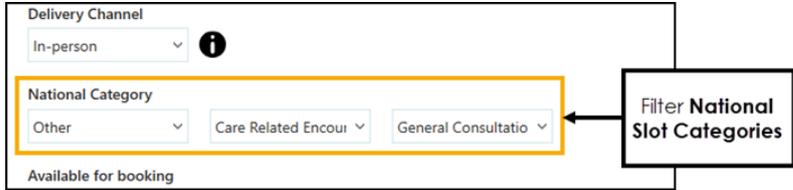To add a **National Slot Category** to a slot type:

1. From the **Appointments Setup menu**, select **Slot Types** - **Practice** and the list
   of your existing slot types displays.

2. Select the **Slot Type** required and then select **Edit** 🖊.

3. The **Edit Slot Type** screen displays:

Edit Slot Type

Name
Advance

☐ Web bookings   ☐ Non-viewable

Short Name
Adv

Duration
10 mins

Delivery Channel
In-person ⌄ ⓘ

National Category
Other ⌄   Care Related Encoui ⌄   General Consultatio ⌄

Available for booking
1 week prior ⌄

Warning Message
This slot can only be booked one week prior   7

Colour

Apply   Cancel

4. From **National Category** options, select the category that fits the selected **Slot Type** from:

- **Setting** - Select where appointments, booked with this slot type, should take place.

- **Type** - Select the type of appointment this slot type is used for.

- **Category** - Select the appropriate **Category** for this slot type.

Delivery Channel
In-person ⌄ ⓘ

National Category
Other ⌄   Care Related Encoui ⌄   General Consultatio ⌄ ← Filter **National Slot Categories**

Available for booking

5. Select **Apply** [Apply] to save the changes.

Slot Types – National

From the **Appointments Setup menu**, select **Slot Types** - **National** to view a list of all the available **National Slot Categories** as provided by NHS Digital:

✏️ **Note** - This list for reference only, it is maintained by NHS Digital and is updated periodically.

Slot Types – Mapping

From the **Appointments Setup menu**, select **Slot Types** - **Mapping** to display all slot types and the mapped **National Slot Categories**.

From here you can add a category to multiple slot types. To select the **Slot Types** to update, you can filter by:

- **All Slot Types**.

- **Categorised**.

- **Uncategorised**.

- **Items with outdated categories** - flags any categories that are no longer in the list displayed in **Slot types** - **National**. If these are still in use, they need to be reviewed and a new category attributed.

Set a Slot Type Category

From **Slot Types** - **Mapping** you can select the category for multiple slot types at the same time.

To set a slot type category for multiple slot types:

1. From the **Appointments Setup menu**, select **Slot Types** - **Mapping**, the **Mapping** screen displays:
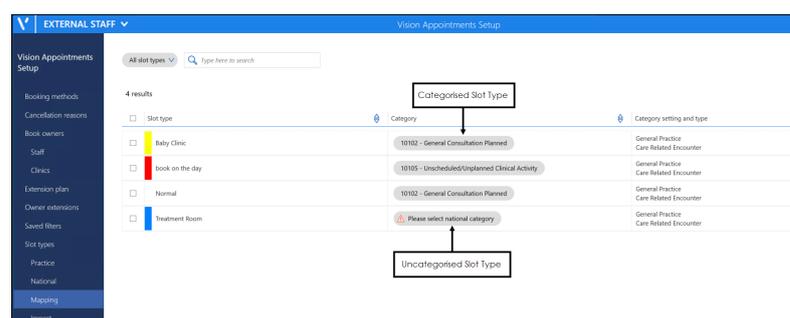
2. Filter the slot types, if required:
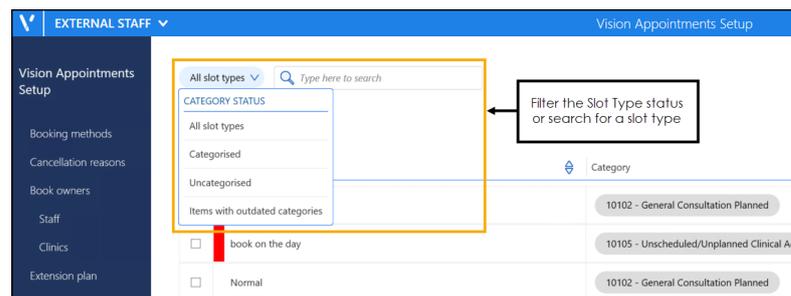
3. Tick all the slot types to map to the same category.

4. Select **Change national category**.

5. A list of the national slot categories displays:
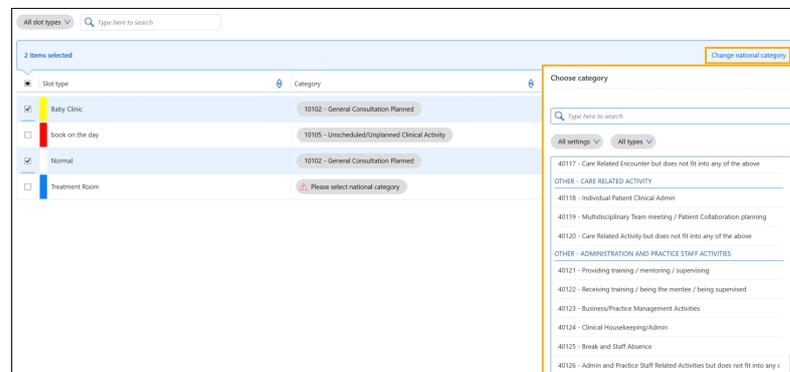
6. Use the filters to find and select the required category:

Choose category

Q Type here to search

[All settings ∨] [All types ∨] ← Filter categories

40117 – Care Related Encounter but does not fit into any of the above

OTHER - CARE RELATED ACTIVITY

40118 – Individual Patient Clinical Admin

40119 – Multidisciplinary Team meeting / Patient Collaboration planning

40120 – Care Related Activity but does not fit into any of the above

OTHER - ADMINISTRATION AND PRACTICE STAFF ACTIVITIES

40121 – Providing training / mentoring / supervising

40122 – Receiving training / being the mentee / being supervised

40123 – Business/Practice Management Activities

40124 – Clinical Housekeeping/Admin

40125 – Break and Staff Absence

40126 – Admin and Practice Staff Related Activities but does not fit into any c

7. Select **Save** to save your changes or **Reset** to cancel any changes:

Save   Reset

Slot Types – Import

When **National Slot Categories** are added, updated or inactivated you receive a file detailing all the changes.

> 💡 **Remember** - You can filter and review items with outdated categories in the **Slot Types - Mapping** screen.

From **Slot Types** - **Import** you can import a file provided to you by the NHS following an update to the list of **National Slot Categories**. The file proposes mass changes to the Slot Types.

To view the proposed changes:

1. Save the file provided to you by the NHS to your computer.

2. From the **Appointments Setup menu** select **Slot Types** - **Import**.

3. The **Open** screen displays:
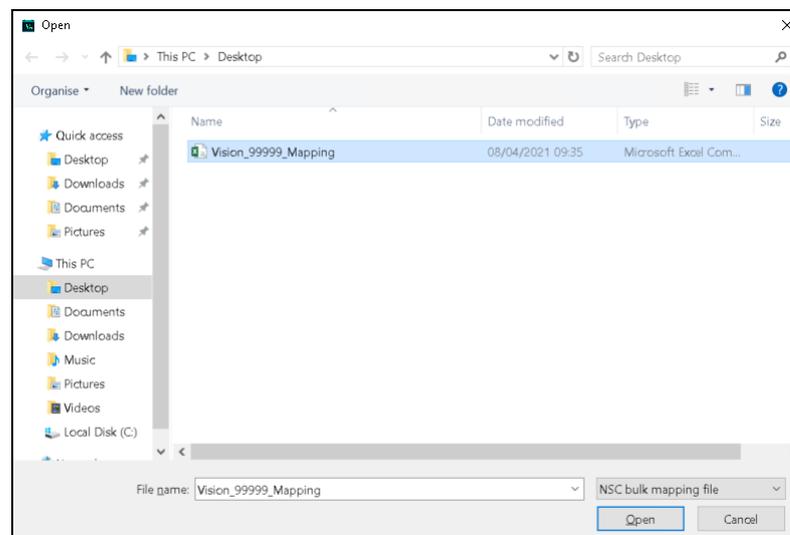
4. Locate and highlight the file you saved and select **Open**.

5. The centrally proposed changes display:
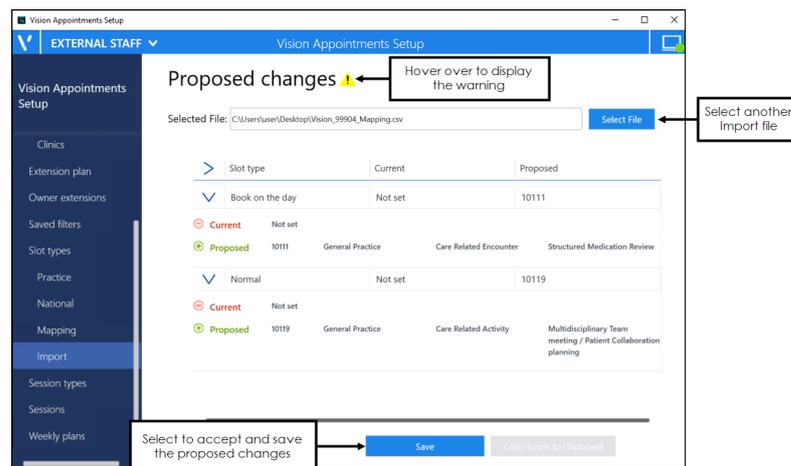
6. Select **Save** ![Save] to accept and save the proposed changes.

7. If required, select **Select File** ![Select File] to find and process another file.

8. You can navigate away from the proposed changes screen without saving the changes if required.

9. Your **National Slot Categorisation** mapping should now be reviewed, see **Slot Types – Mapping on page 10** to review any additional or outdated categories.

File Error

If there is a problem with the selected file the **File Errors** screen displays:
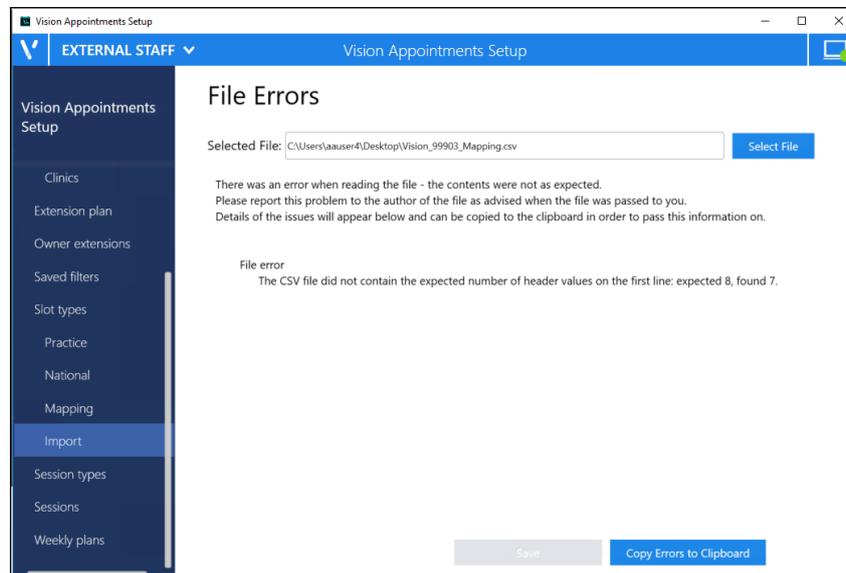
Select either:

- **Select File** to find and process a different file.

- **Copy Errors to Clipboard** to copy to the Windows clipboard and paste into a document to action as required.

SMS Messaging

The ability to automatically send SMS (text) messages to let patients know that their appointment has been booked, rescheduled or cancelled can help cut down the number of DNAs and mis-communications.

Appointments Setup can be configured to automatically send SMS messages.

ℹ️ **Important** - SMS messaging must be enabled and set up prior to it being available, please contact your Account Manager for more information.

✏️ **Note** - Once enabled SMS message defaults to **OFF** for every user.

To switch the **SMS Messaging** facility on or off per user select:

- **On** to **automatically** send SMS messages when an appointment is made or updated in any way.

- **Off** to prevent SMS messages being sent. Any appointment changes display in **SMS History** as '*Failed*'.

The **SMS messages** sent are not configurable, the messages sent are as follows with the appropriate patient and appointment information merged:

Appointment Booked	Appointment Cancellation	Appointment Reschedule in progress
An appointment has been made for you at 09:00 on Monday 7th December with BABY CLINIC at Test Surgery	Your appointment at 10:00 on Monday 7th December with BABY CLINIC has been cancelled	Your appointment at 09:50 on Tuesday 8th December with BABY CLINIC has been cancelled and will be rescheduled. You will receive a notification of the new time and date.

SMS Counter

The **SMS Counter** displays the number of messages that you have sent since the count was last cleared. The colour of the counter indicates the status of the message(s):

- **Grey** - No messages sent

- **Green** - All messages were sent successfully.

- **Yellow** - Some messages were sent successfully, some failed, check the history for details.

- **Red** - All messages have failed, check the history for details.

Important - The **SMS Counter** clears to zero when you log out of **Appointments Setup**.

SMS History

The **SMS History** screen displays all attempted **SMS Messages**, in time order with latest at the top.

To access the **SMS History** screen:

1. Select the **SMS Counter** .

2. The **SMS History** screen displays:

Each entry displays the message type, message details and patient details.

- **Message Types**:

    - **Booking**.

    - **Reschedule**.

    - **Pending Reschedule** (Appointment has been moved to the clipboard).

    - **Cancellation**.

- **Successful messages** - Display '*Success: Sent*'.

- **Failed messages** - Display '*Failed*' with the reason why.

✎ **Note** - **Special Bookings** are not sent via **SMS message**.

From the **SMS History** screen you can select:

- **Hide successful requests** ☐ Hide successful requests - Tick to hide successful requests, with successful messages hidden, you can clearly see which messages failed and might need action taken.

- **Copy to Clipboard** [Copy to Clipboard] - To copy to the Windows clipboard and paste into a document to action as required.

- **Print** [Print] - To print the history list.

💡 **Training Tip** - You can print to a PDF if required.

- **Clear** [Clear] - To clear all history and reset the **SMS Counter** resets to zero.

ℹ **Important** - The **SMS Counter** also clears to zero when you log out of **Appointments Setup**.

ℹ **Important** - **SMS messaging** is available in a Shared Care Setting.