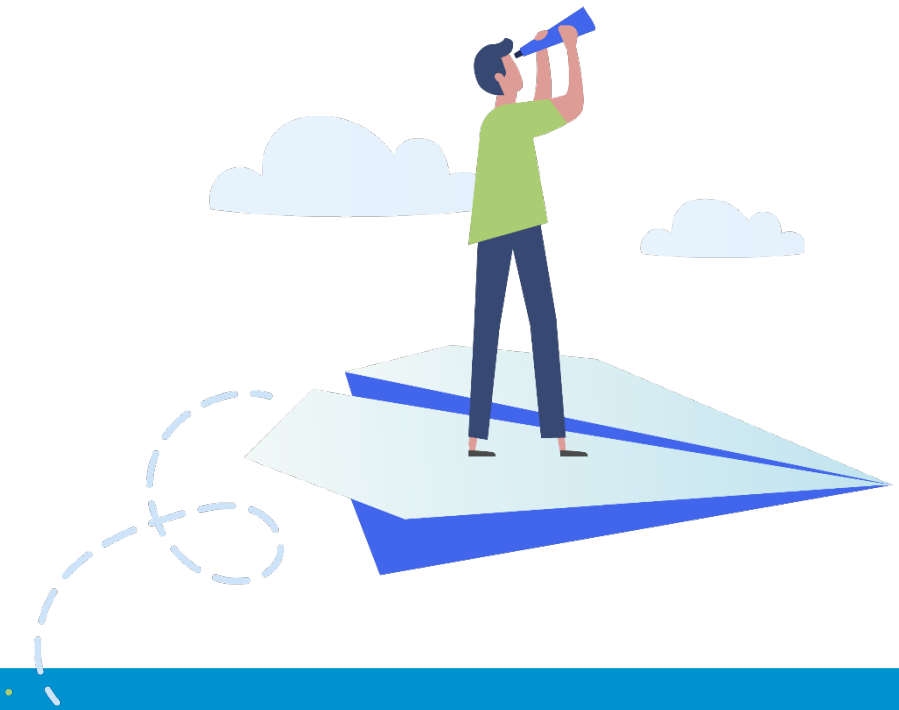
Appointments

Appointments Setup 3.4 Release Guide

Version 1.1

20 February 2023



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Appointments Setup Release 3.4

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

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

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.

All Users

- **Appointment Override Reasons** - You can now add and maintain a list of **Override reasons** in **Appointments Setup**. Select from the **Override reasons** list in **Appointments** when booking a patient into a slot with a **Days/Hours Prior** restriction.

See **Override Reasons** on page **6** for more information.

- **Ad-Hoc Book Management** - You can now add ad-hoc sessions to your appointment books up to a maximum of seven days in the past. For example, if patients were seen unexpectedly out of practice..
- **Searching for Slot Types in Sessions** - You can now search for the slot types in use in your active sessions. This is useful if you are editing a slot type and need to find out which sessions it could affect.

See **Searching for Slot Types in Sessions** on page **9** for more information.

- **Searching for Sessions in Weekly Plans** - You can now search for the sessions in use in your weekly plans. This is useful if you are editing a session and need to find out which weekly plans it could affect.

See **Searching for Sessions in Weekly Plans** on page **11** for more information.

- **Fix Slot Duration** - When editing a session, slots with a duration that do not match the duration set in **Slot Types** are identified by a tooltip

. You can now select **Fix Duration**

to update a slot type duration to match the duration set in the **Slot Types** screen.

Desktop Only Users

- **Linked Appointments Warnings** - To ensure you do not miss a **Linked appointment warning** it has been updated, it also now flashes for 10 seconds when changes that affect linked appointments are made in either **Extension Plan** or **Ad-hoc Book Management**.

England Only

- **Appointment Mode Mapping** - General Practice Appointments Data (GPAD) is an NHS England requirement introduced to provide information about GP appointments usage at practice level.

Note - GPAD data extracts automatically.

You are required to map all slot types to one of the following appointment modes:

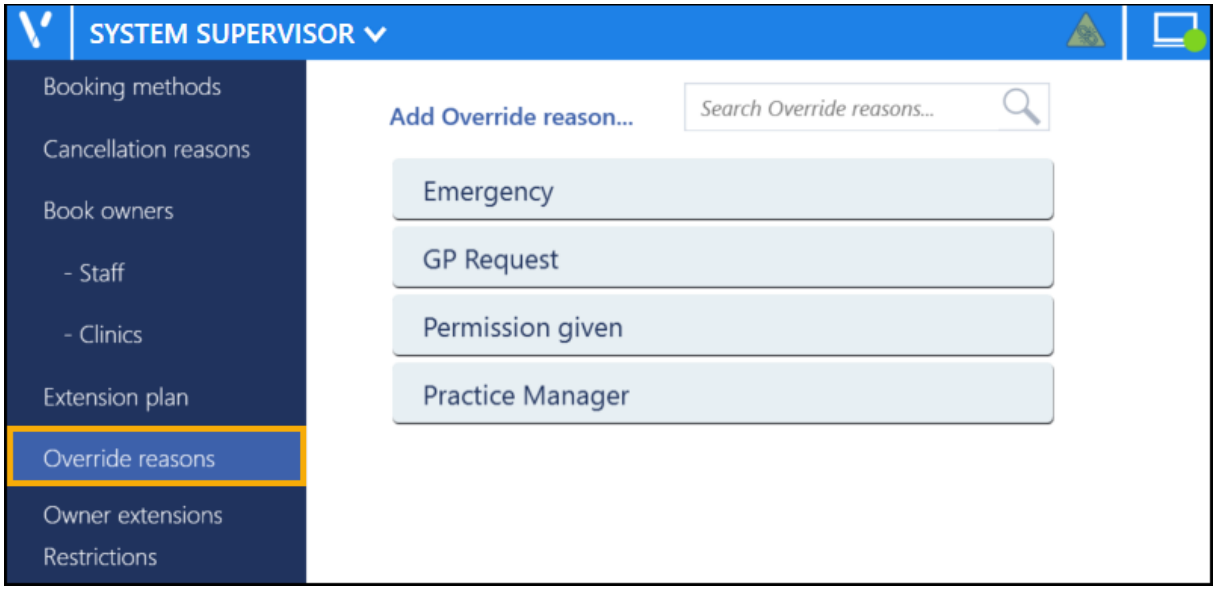
- **Face to Face (Surgery)**
- **Face to Face (Home Visit)**
- **Written (Including Online)**
- **Telephone/Audio**
- **Video with Audio**
- **Not an Appointment**

See **Appointment Mode Mapping** on page **13** for more details.

Override Reasons

To record why you are booking an appointment in a slot with a **Days/Hours Prior** restriction, you can select an **Override reason**.

To view your existing **Override Reasons**, from the **Appointments Setup** menu, select **Override reasons** Override reasons and the **Add Override reason** screen displays:



Training Tip - You can drag and drop the reasons into the order you want them to display. If your list of reasons is too long to fit on your screen, you can search for one using **Search Override reasons**.

See **Adding Override Reasons** on page 7 and **Editing or Deleting Override Reasons** on page 8 for further details.

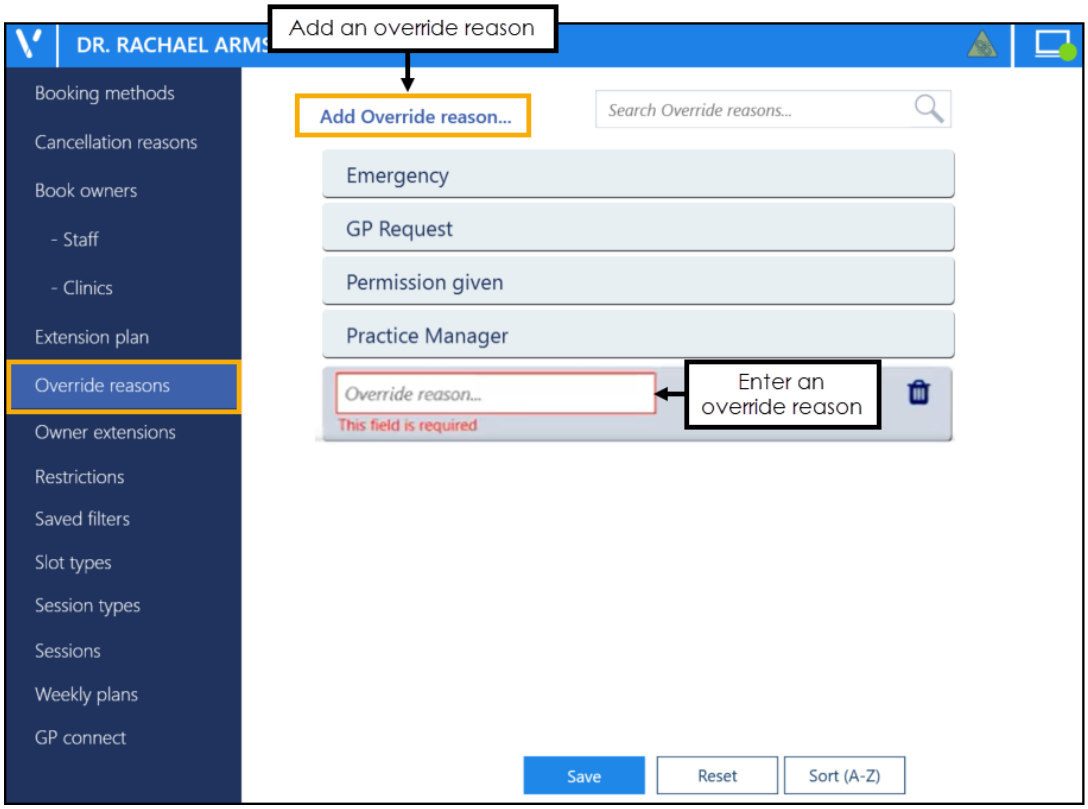
Adding Override Reasons

You can use **Override reasons** to record why you are booking an appointment in a slot with a **Days/Hours Prior** restriction.

To add an **Override reason**:

1. From the **Appointments Setup** menu, select **Override reasons**

and the **Override reasons** screen displays:



2. Select **Add Override reason**

and a blank **Override reason** displays at the bottom of the list.

3. In **Override reason** enter the name of the new override reason.

> **Note** - If you enter a duplicate **Override reason**, a message displays advising *'This override reason is already in use'*.

4. If required, drag and drop it to the appropriate place in the list.
5. Select **Save** to save your changes, **Reset** to cancel any changes or **Sort (A-Z)** to reorder the list.

Editing or Deleting Override Reasons

To edit or delete an **Override reason**:

Training Tip - You can drag and drop the reasons into the order you want them to be presented. If your list of reasons is too long to fit on your screen, you can search for one using **Search Override reasons**.

1. From the **Appointments Setup** menu, select **Override reasons** Override reasons and the **Override reasons** screen displays:

2. Select the override reason you wish to edit or delete and then either:
   - Update the name, or
   - Select **Delete** .
3. Select **Save** to save your changes, **Reset** to cancel any changes or **Sort (A-Z)** to reorder the list.

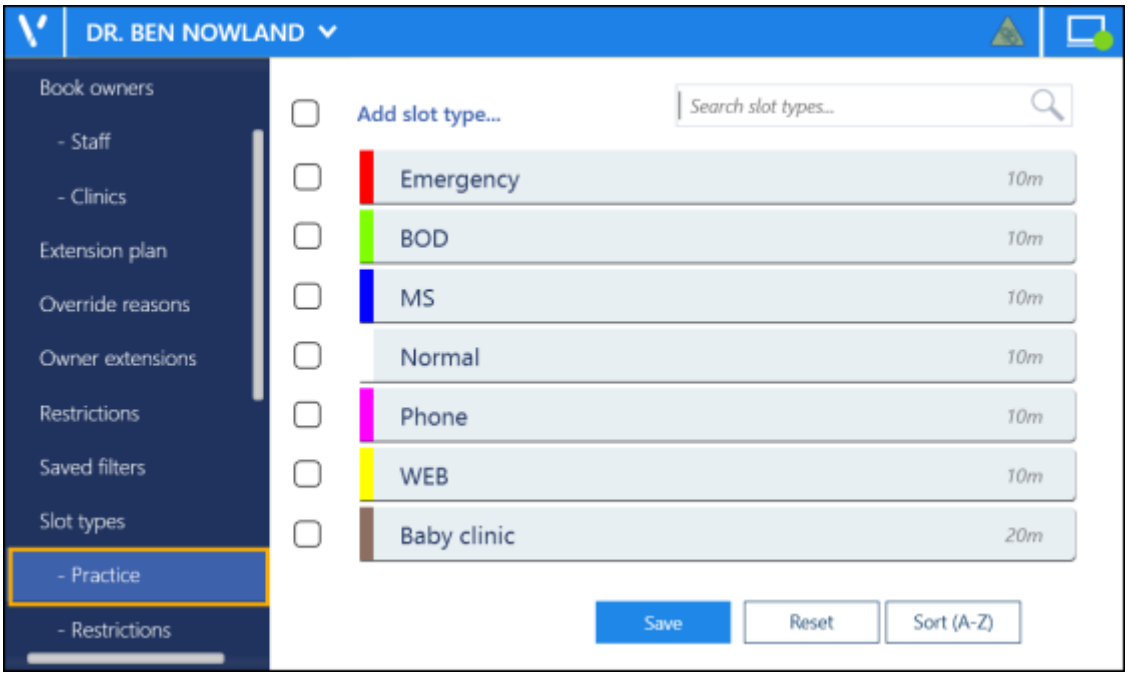
See **Adding Override Reasons** on page **7** for details.

Searching for Slot Types in Sessions

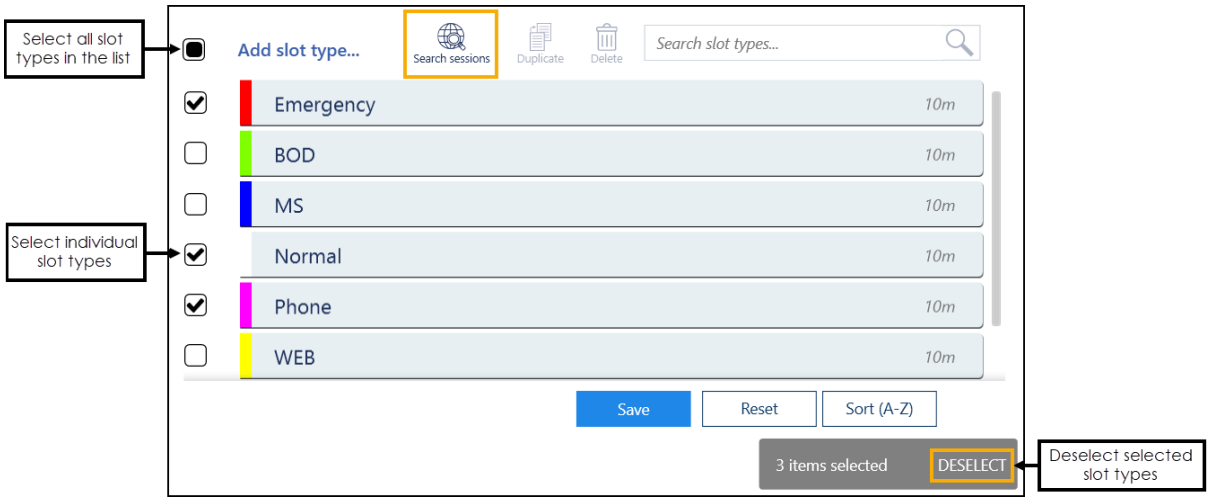
You can search for slot types in use in your active sessions. This is useful if you are editing a slot type and need to find out which sessions it could affect.

To search for slot types in your active sessions:

1. From **Appointments Setup**, select **Slot types - Practice** from the **Appointments Setup menu**. The existing slot types display:

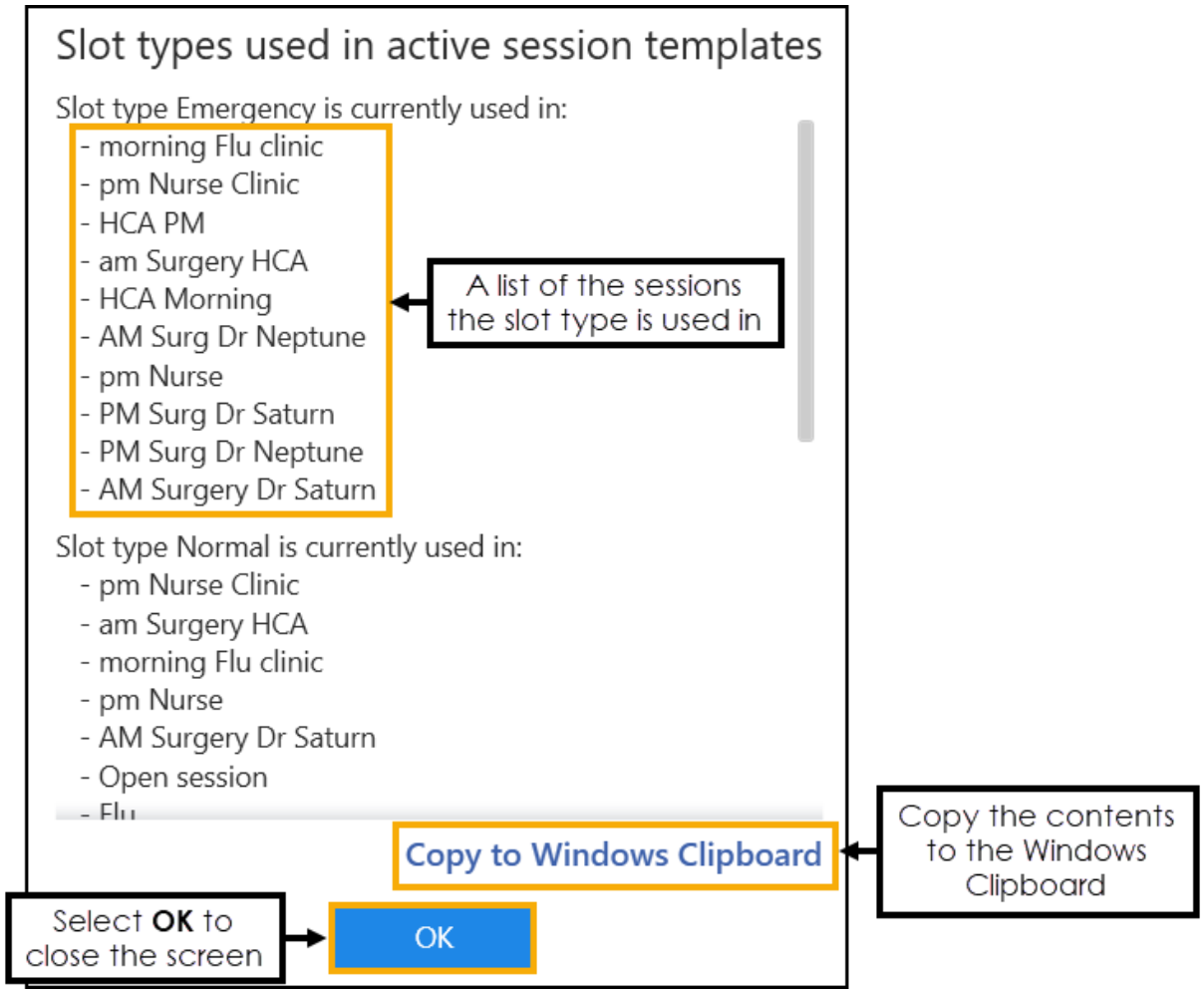


2. Tick the slots that you want to search for, and the additional toolbar displays:



Training Tip - You can select multiple slots or tick the top option to select all the slots in the list.

3. Select **Search sessions** Search sessions. The **Slot types used in active session templates** screen displays which sessions the selected slot types are used in:

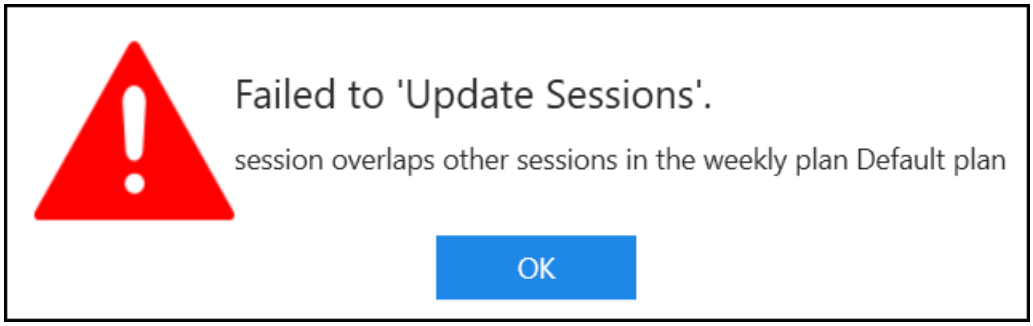


4. Select **Copy to Windows Clipboard** Copy to Windows Clipboard to copy the details to the Windows Clipboard and paste into a document if required.

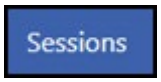
5. Click **OK** OK to close the **Slot types used in active session templates** screen.

Searching for Sessions in Weekly Plans

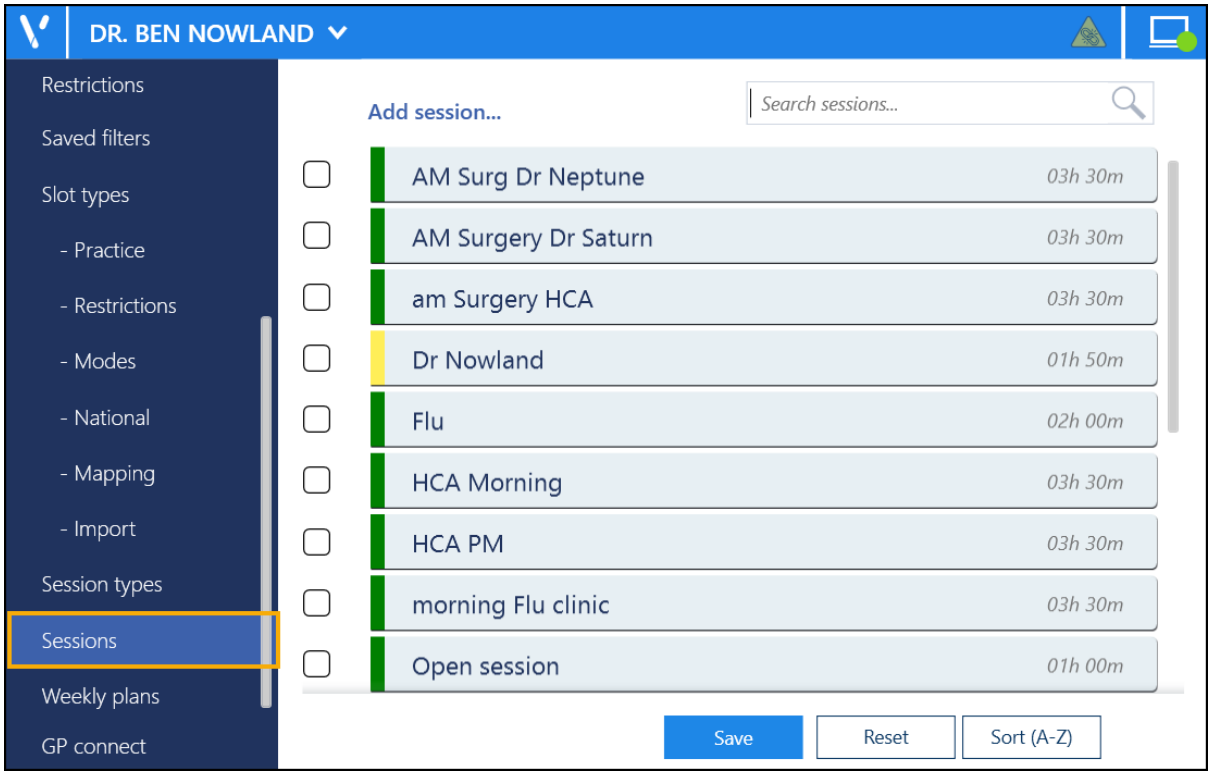
You can search for sessions in use in your weekly plans. This is useful if you are editing a session and need to find out which weekly plans it could affect. For example if you extend a session and it creates a conflict in the weekly plan, the following error displays:



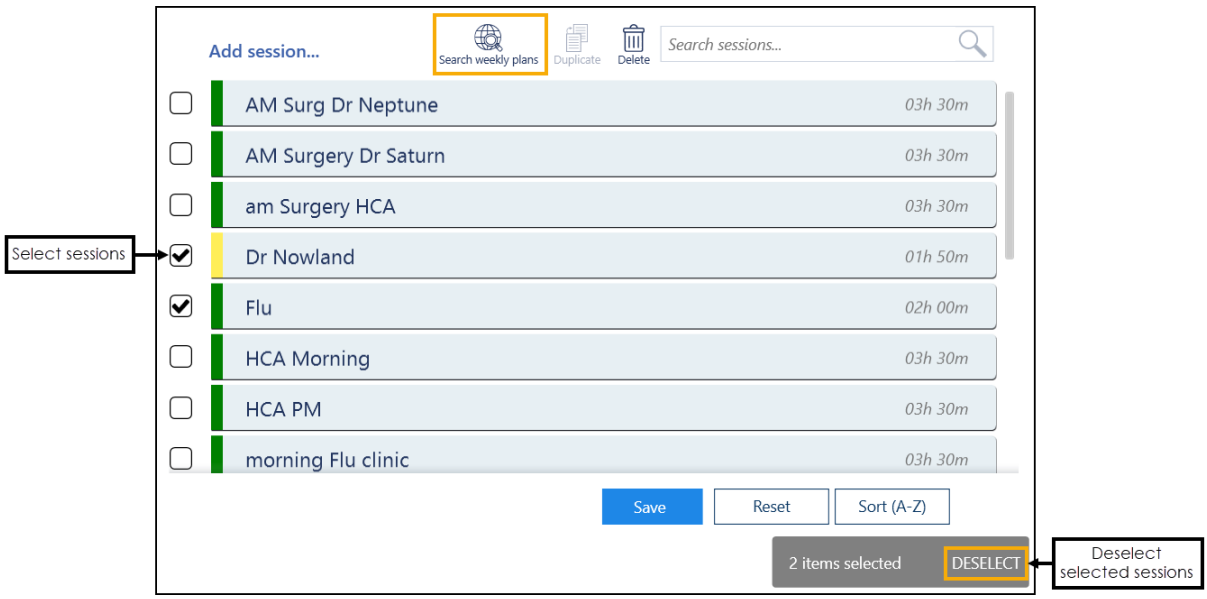
To search for a session in your active sessions:

1. From **Appointments Setup**, select **Sessions** 

from the **Appointments Setup menu**. The existing slot types display:



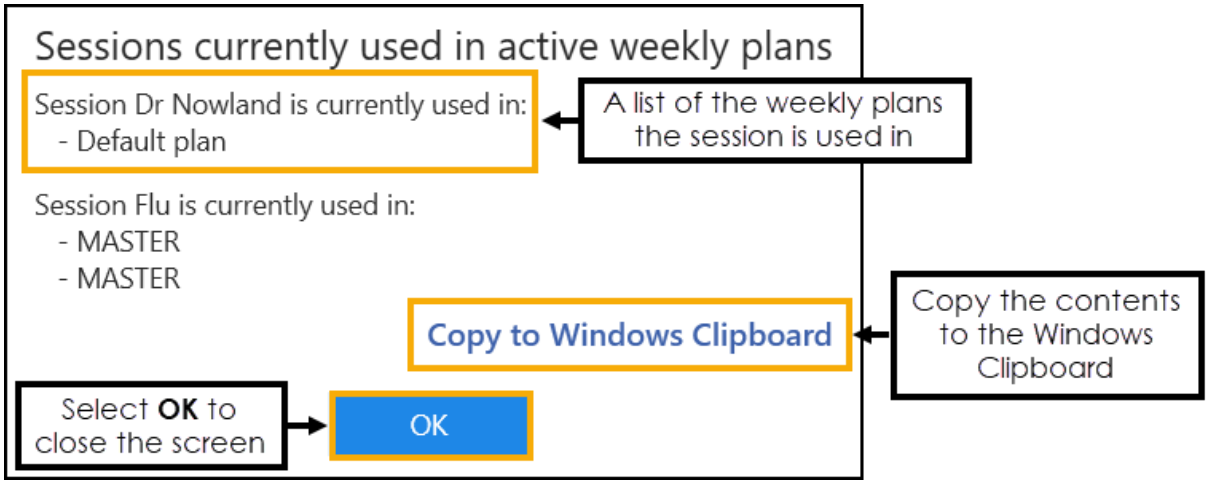
2. Tick the sessions that you want to search for, and the additional toolbar displays:



Training Tip - You can select multiple sessions to search for.

3. Select **Search weekly plans**

. The **Sessions currently used in active session weekly plans** screen displays the weekly plans that use the selected sessions:



4. Select **Copy to Windows Clipboard**

to copy the details to the Windows Clipboard and paste into a document if required.

5. Click **OK**

to close the **Sessions currently used in active session weekly plans** screen.

Appointment Mode Mapping

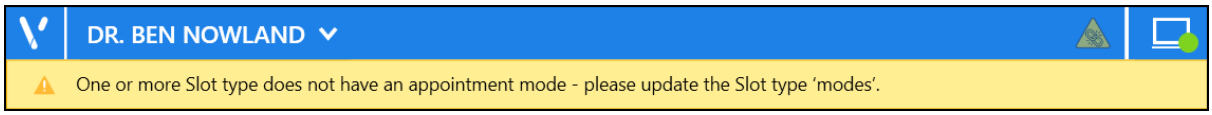
General Practice Appointments Data (GPAD) is an NHS England requirement introduced to provide information about GP appointments usage at practice level.

Note - GPAD data extracts automatically.

You are required to map all slot types to one of the following appointment modes:

- **Face to Face (Surgery)**
- **Face to Face (Home Visit)**
- **Written (Including Online)**
- **Telephone/Audio**
- **Video with Audio**
- **Not an Appointment**

Until you map all your slot types to valid appointment modes the following message displays '*One or more Slot type does not have an appointment mode - please update the Slot type 'modes'.*':



Note - This does not stop you using existing slot types, however when you create new slot types, they need to be mapped to an **Appointment Mode**.

Mapping Slot Types to Appointment Modes

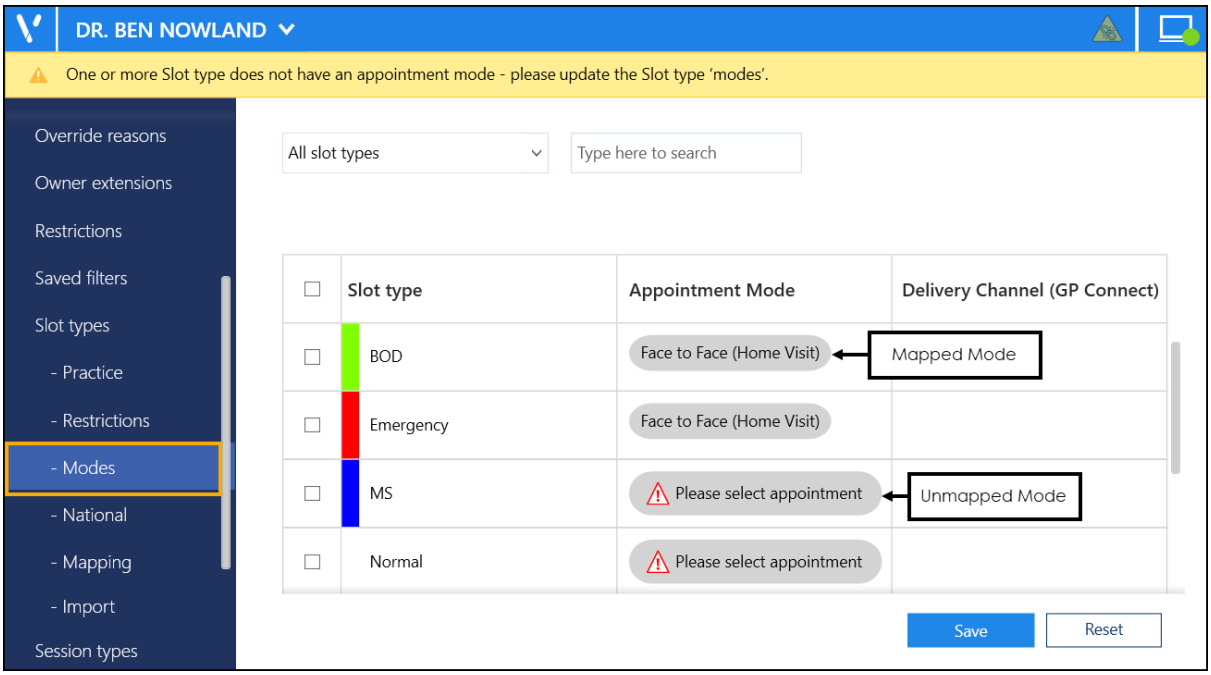
From the **Appointments Setup menu**, select **Slot Types** - **Modes** to display all slot types and the mapped appointment modes.

Note - You can map a mode to multiple slot types.

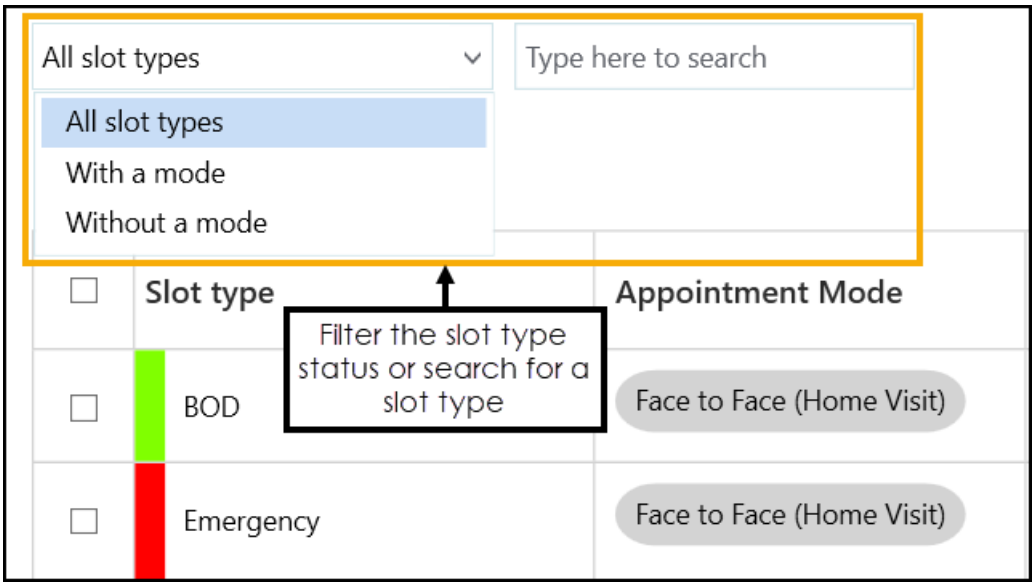
Set a Slot Type Category

To set a slot type mode for multiple slot types:

1. From the **Appointments Setup menu**, select **Slot Types** - **Modes**, the **Appointment Modes** screen displays:



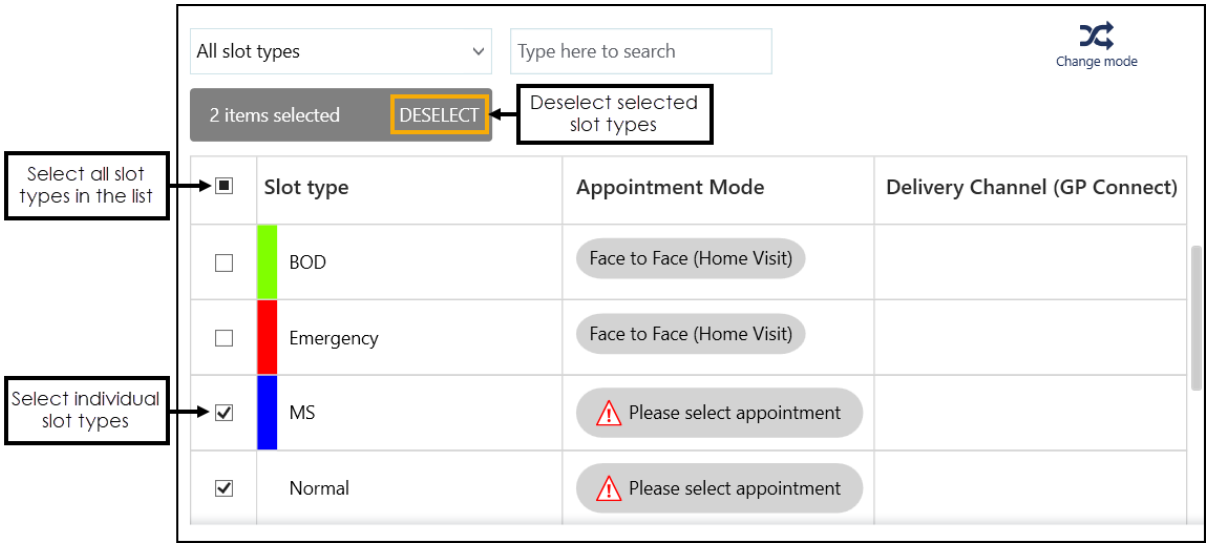
2. Filter or search for slot types, if required:



You can filter by the following slot types:

- **All Slot Types**
- **With a mode**
- **Without a mode**

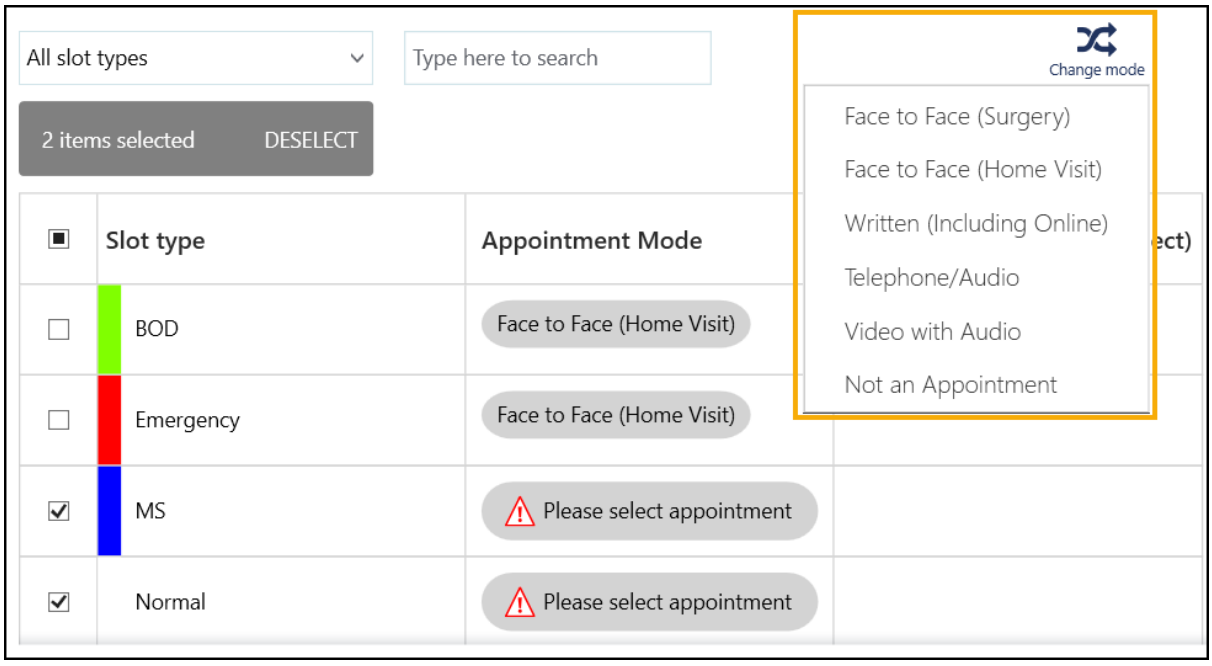
3. Tick the slot type(s) to map to the same mode:



Training Tip - You can select multiple slot types or tick the top option to select all the slot types in the list.

4. Select **Change mode**

and a list of appointment modes displays:



5. Select an appointment mode to map to the selected slot type(s):
    - **Face to Face (Surgery)**
    - **Face to Face (Home Visit)**
    - **Written (Including Online)**
    - **Telephone/Audio**
    - **Video with Audio**
    - **Not an Appointment**

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