

# Appointments Setup 3.4 Release Guide

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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**.

**Unportant** - For full functionality **Vision 3** users must be on **DLM 860**, see <u>Checking your Current DLM Version in the Vision 3 Front screen Help</u> <u>Centre</u> 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

10 mins 10. 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** and the **Add Override reason** screen displays:

M	SYSTEM SUPERVIS	Sor 🗸	
Во	oking methods	Add Override reason	
Ca	ncellation reasons		
Bo	ok owners	Emergency	
	Staff	GP Request	
	Clinics	Permission given	
Ext	ension plan	Practice Manager	
Ov	erride reasons		
	vner extensions strictions		

**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:

V DR. RACHAEL ARMS	Add an override reason
Booking methods	Add Override reason
Cancellation reasons	
Book owners	Emergency
- Staff	GP Request
- Clinics	Permission given
Extension plan	Practice Manager
Override reasons	Override reason Enter an override reason
Owner extensions	This field is required
Restrictions	
Saved filters	
Slot types	
Session types	
Sessions	
Weekly plans	
GP connect	
	Save Reset Sort (A-Z)

- 2. Select Add Override reason 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.
- 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 <b>Override reasons</b> screen displays:

	OR ✔	
Extension plan	Add Override reason	rride reasons Q
Override reasons		Select to
Owner extensions	Emergency Edit text	
Restrictions	GP Request	
Saved filters	Permission given	

- 2. Select the override reason you wish to edit or delete and then either:
  - Update the name, or
  - Select **Delete**
- 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:

V DR. BEN NOWLA	ND 🗸			
Book owners		Add slot type	Search slot types	Q
- Staff - Clinics	0	Emergency		10m
Extension plan	Ο	BOD		10m
Override reasons		MS		10m
Owner extensions	$\Box$	Normal		10m
Restrictions		Phone		10m
Saved filters	$\Box$	WEB		10m
Slot types	$\Box$	Baby clinic		20m
- Practice				
- Restrictions			Save Reset Sort	(A-Z)

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

Select all slot types in the list	•	Add slot type	Search sessions	Duplicate	Delete	Search sl	ot types		Q		
		Emergency							10m		
		BOD							10m		
		MS							10m		
Select individual slot types	•	Normal							10m		
		Phone							10m		
		WEB							10m		
					Sav	'e	Reset	Sort (A-Z)			
							3 item	s selected	DESELEC	eselect sel slot type	

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



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



5. Click **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:

V	DR. BEN NOWLA	ND 🗸			
	strictions	А	dd session	Search sessions	Q
	ved filters t types		AM Surg Dr Neptune		03h 30m
	Practice		AM Surgery Dr Saturn		03h 30m
	Restrictions		am Surgery HCA		03h 30m
	Modes		Dr Nowland		01h 50m
	National		Flu		02h 00m
	Mapping		HCA Morning		03h 30m
	Import		HCA PM		03h 30m
Ses	sion types		morning Flu clinic		03h 30m
	sions		Open session		01h 00m
We	ekly plans				
GP	connect		Sa	Reset Sort	(A-Z)



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

	A	dd session Search weeky plans Duplicate Delete	essions
		AM Surg Dr Neptune	03h 30m
		AM Surgery Dr Saturn	03h 30m
		am Surgery HCA	03h 30m
Select sessions	•	Dr Nowland	01h 50m
		Flu	02h 00m
		HCA Morning	03h 30m
		HCA PM	03h 30m
		morning Flu clinic	03h 30m
		Save	Reset Sort (A-Z)
			2 items selected DESELECT Deselect selected sessions
	ct Se	ining Tip - You can select multiple arch weekly plans . The ssion weekly plans screen display	Sessions currently used in
the s	elec	ted sessions:	
Se	ssio	ns currently used in active we	eekly plans
			st of the weekly plans he session is used in
-	sion F MAST MAST		
		e screen → OK	Clipboard
4. Selec	ct Co	opy to Windows Clipboard Copy to	<b>windows Clipboard</b> to copy the

- details to the Windows Clipboard and paste into a document if required.
- 5. Click OK or 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.



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:

DR. BEN NOWLAN	D 🗸			🔺 🗔
▲ One or more Slot type do	es not have ar	n appointment mode - please up	date the Slot type 'modes'.	
Override reasons	All slot t	ypes 🗸	Type here to search	
Owner extensions				
Restrictions				
Saved filters		Slot type	Appointment Mode	Delivery Channel (GP Connect)
Slot types				
- Practice		BOD	Face to Face (Home Visit)	Mapped Mode
- Restrictions		Emergency	Face to Face (Home Visit)	
- Modes		MS		
- National		MS	Please select appointment	Unmapped Mode
- Mapping		Normal	A Please select appointment	
- Import				Save Reset
Session types				Save



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:

	All slot t 2 item		here to search select selected slot types	Change mode
Select all slot types in the list	→■	Slot type	Appointment Mode	Delivery Channel (GP Connect)
		BOD	Face to Face (Home Visit)	
		Emergency	Face to Face (Home Visit)	
Select individual slot types	→ ✓	MS	▲ Please select appointment	
	✓	Normal	A Please select appointment	

**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:

All slot t	ypes 🗸	Type here to search	Change mode
2 items	s selected DESELECT		Face to Face (Surgery) Face to Face (Home Visit)
	Slot type	Appointment Mode	Written (Including Online) •ct)
	BOD	Face to Face (Home Visit)	Video with Audio
	Emergency	Face to Face (Home Visit)	Not an Appointment
✓	MS	Please select appointment	
	Normal	Please select appointment	t

- 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:

