National Slot Categorisation Quick Reference Guide

National Slot Categorisation is an NHS England requirement aimed at standardising the types of slots used in appointments across all systems in England. The National Categories are issued and maintained centrally, for you to assign to your existing slot types.

> **Note** - **National Slot Categorisation** is only available if you have upgraded to **Appointments Setup** for the maintenance of your appointment books.

This quick reference guide details initial allocation of slot categorisation, usage and the maintenance requirement.

What do I need to do?

Once you have received **Appointments Setup** release 3.1, as soon as possible you should review your existing **Slot Types** and map them to a **National Slot Category**.

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:

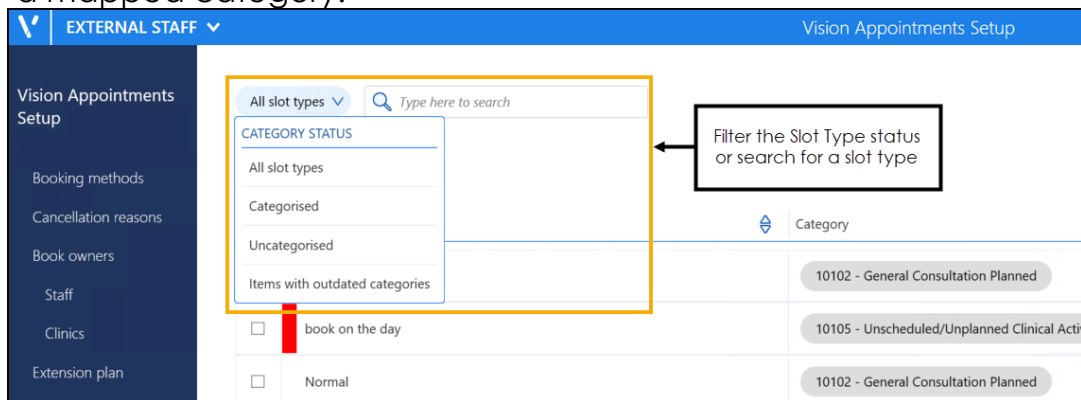| V	DR. MEDICAL OFFICER MOD-LOSSIEMOUTH	Vision Appointments Setup	🖥
⚠	One or more Slot type does not have a valid National Slot Category - please update the Slot type 'mappings'.		
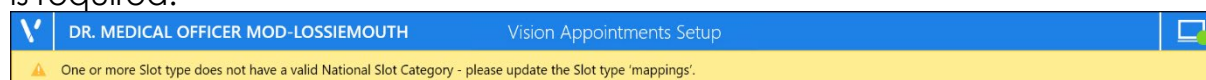
To set a **National Slot Category** for multiple slot types:

1. From the **Appointments Setup menu**, select **Slot Types - Mapping**, the **Mapping** screen displays:
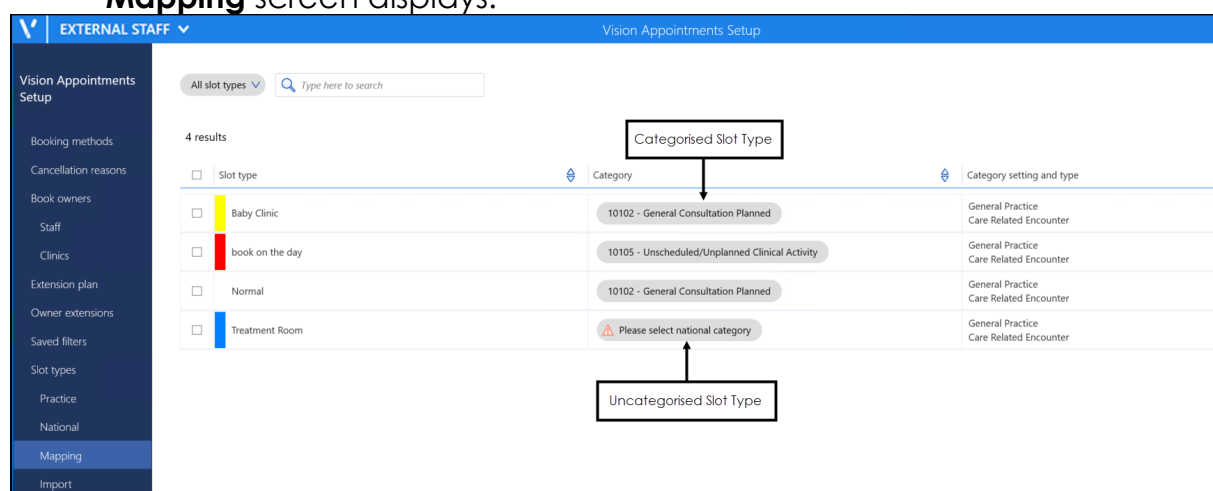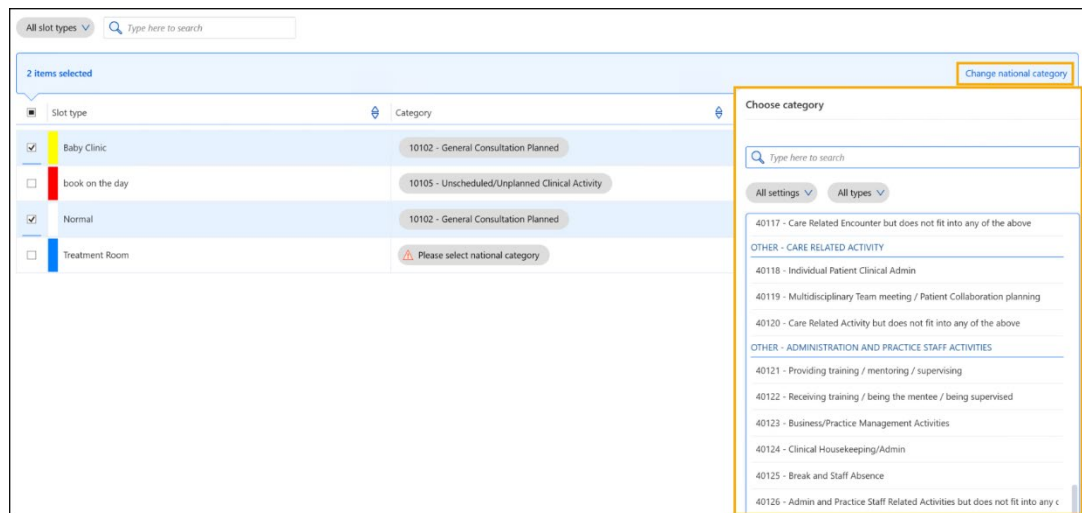
2. Select **Uncategorised** from the filter, to view **Slot Types** that do not have a mapped category:

3. Tick the similar slot types to map them to the same relevant 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:
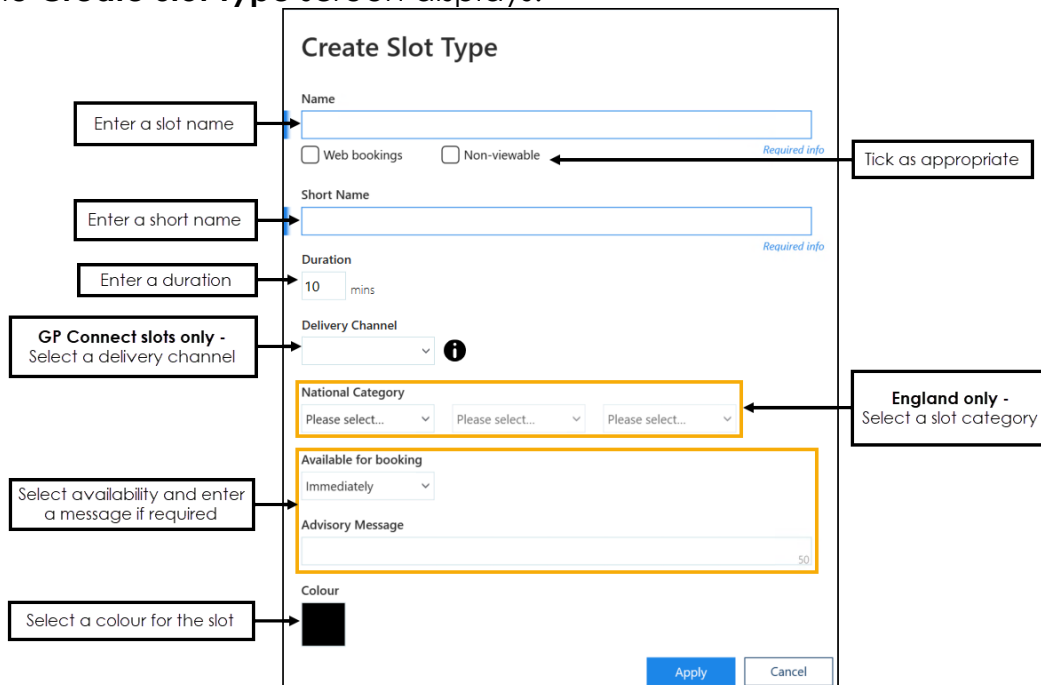

7. Select **Save** to save your changes or **Reset** to cancel any changes:

Creating New Slot Types

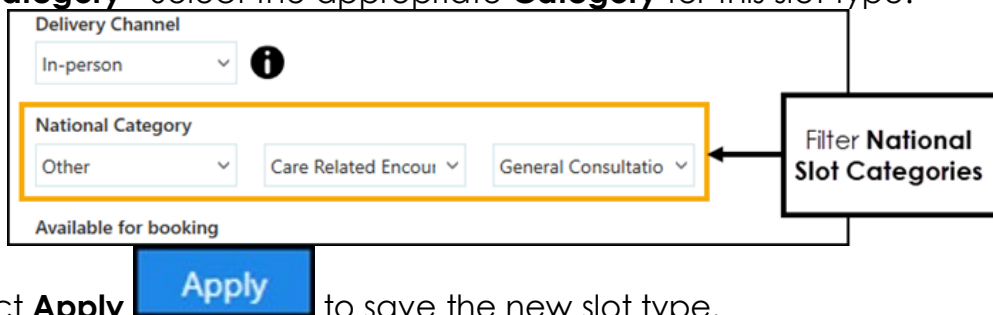When you create a new **Slot Type** you need to assign it to a **National Slot Category**:

1. From **Appointments Setup**, select **Slot types** [Slot types] from the **Appointments Setup menu**.

2. The existing slot types display, select **Add slot type** [Add slot type...].

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

Create Slot Type

- Enter a slot name → Name [ ] *Required info*
- Web bookings ☐   Non-viewable ☐ ← Tick as appropriate
- Enter a short name → Short Name [ ] *Required info*
- Enter a duration → Duration [10] mins
- GP Connect slots only - Select a delivery channel → Delivery Channel [⌄] ⓘ
- National Category [Please select... ⌄] [Please select... ⌄] [Please select... ⌄] ← England only - Select a slot category
- Select availability and enter a message if required → Available for booking [Immediately ⌄]   Advisory Message [ ] 50
- Select a colour for the slot → Colour [■]

[Apply] [Cancel]

4. Fill in the **Create Slot Type** screen as normal.
5. 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 Encoun ⌄] [General Consultatio ⌄] ← Filter **National Slot Categories**

Available for booking

6. Select **Apply** [Apply] to save the new slot type.

Receiving and Importing Updates

When **National Slot Categories** are added, updated or inactivated you receive a file to upload, detailing all the changes. This file must be imported using the Slot Types - Import facility.
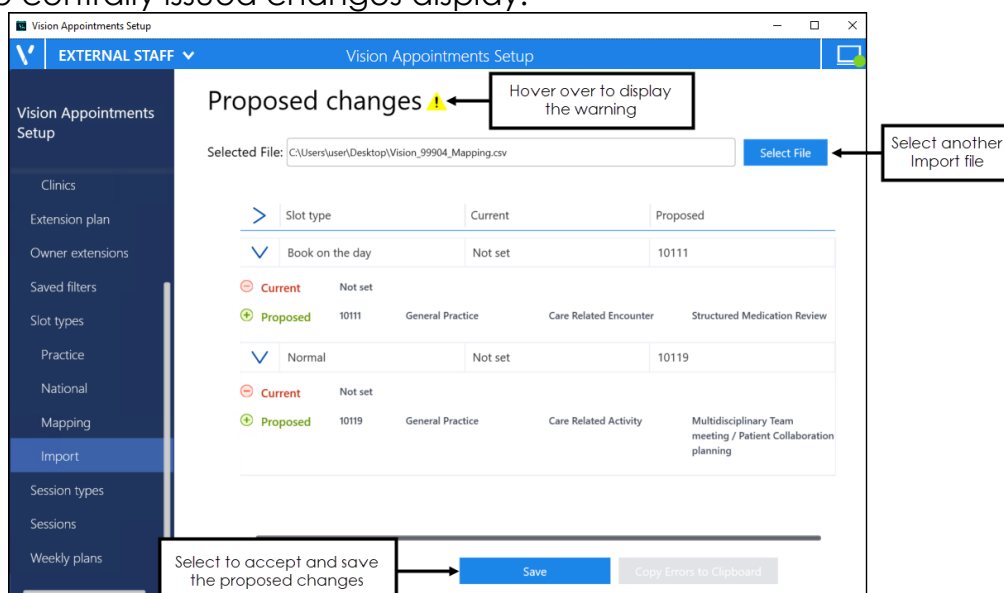
> **Important** - You should review, and if necessary, update items with outdated categories in the **Slot Types - Mapping** screen.

To import and view the proposed changes:

1. Save the file provided to you by the NHS to your computer.
2. Open **Appointments Setup** and log in if required.
3. From the **Appointments Setup menu** select **Slot Types - Import**.
4. The **Open** screen displays:
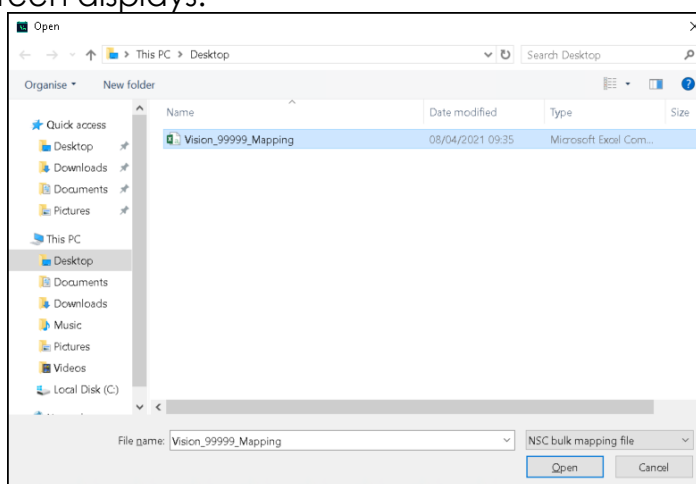
5. Locate and highlight the file you saved and select **Open**.
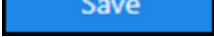6. The centrally issued changes display:

7. Select **Save** [Save] to accept and save the changes.

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

9. You can navigate away from the **Proposed changes** screen without saving the changes if required.

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

File Error

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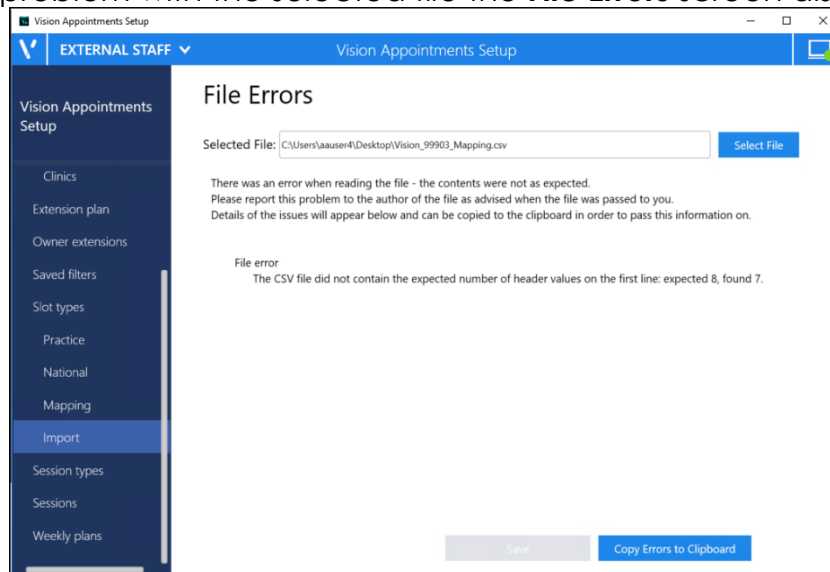
Select either:

- **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.