

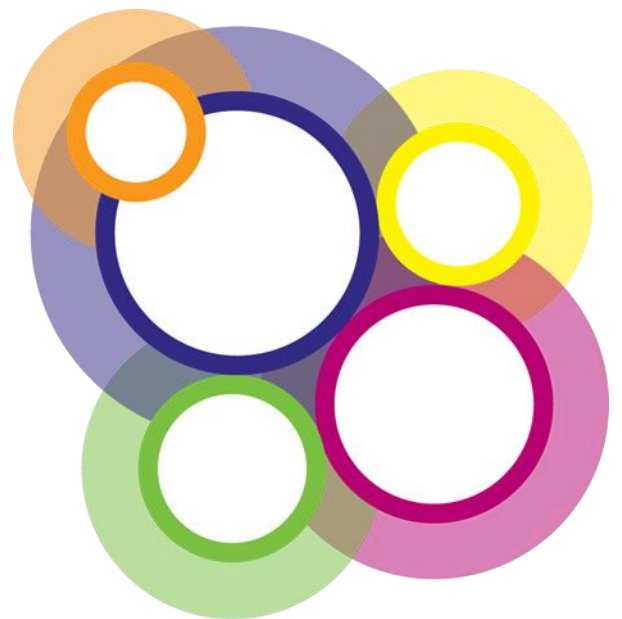


North of England
Commissioning Support

Partners in improving local health

NECS Clinical Systems Specialist Team

EMIS – Appointment Skills Guide



Author: NECS Clinical Systems Specialists Team



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North of England
Commissioning Support

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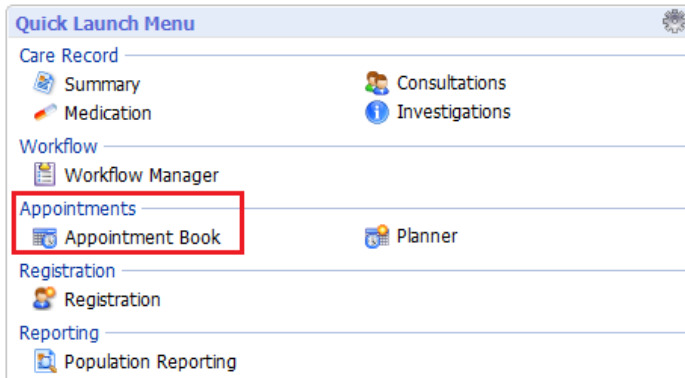
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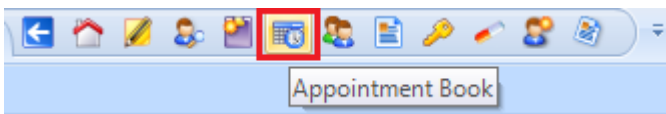
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Accessing the Appointment Book

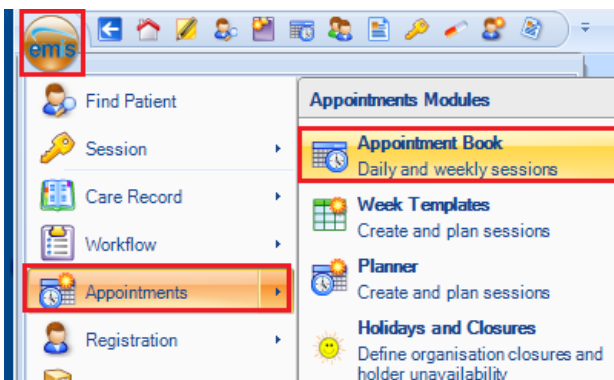
1. Access the **Appointment Book** using one of the following options:
 - a. Click **Appointment Book** from the Homepage



- b. Click **Appointment Book** from the **Quick Access Toolbar** (if configured)

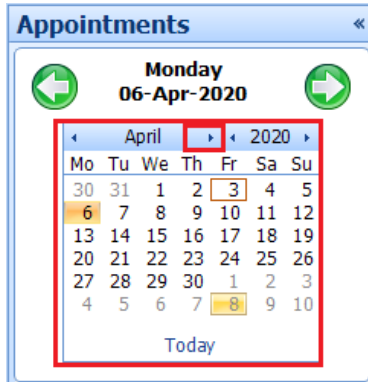


- c. Click **EMIS menu**, select **Appointments** and click **Appointment Book**

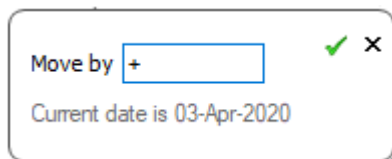


Booking an Appointment

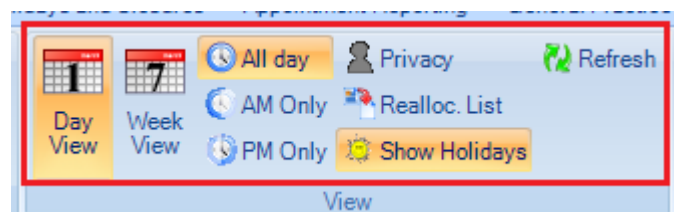
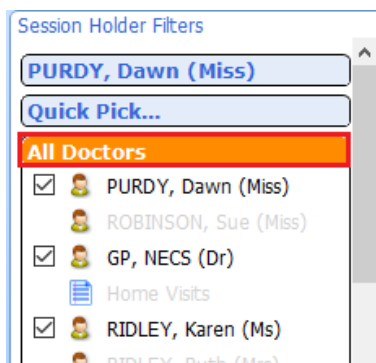
1. Find the appointment slot you wish to book. If the appointment is in the future use one of the following options:
 - a. Use the **Calendar** to select the required date, or move to a different month



- b. Press **+** key on your keyboard add for example 1w, 7d, 1m, press **return**

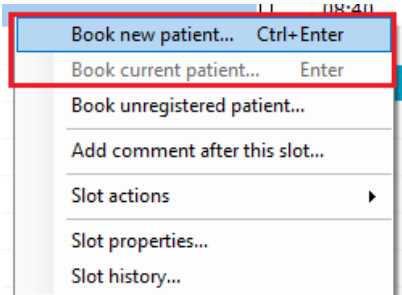


2. Use the **Session Holder Filters** if you wish to filter the appointments, you can also use the filters on the ribbon if necessary to view only am, pm or all day appointments



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- Right click on an empty slot to book (if a longer appointment duration is needed click and drag to highlight slots), select **Book new patient** and find the patient to book an appointment for alternatively **Book current patient** if you already have the patient open or select **Book unregistered patient** if the patient is not yet registered



- Select a **Reason** if your Practice uses them (note this may alter length of appointment from the default), enter any **Booking notes**, select a **Letter/slip (optional)** if required. If the appointment duration is longer than the default you must record a reason
- Click **Book** to book the appointment, or **Book and Print** to book the appointment and print out the confirmation letter/slip. The appointment is now booked

Booking Details

Patient name clear registered patient

Reason double appointment re discussion

Booking notes

Slot type

Letter/slip (optional)

Mobile number

Email address

Additional Information

Patient Warnings
25 Appointment DNAs

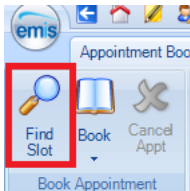
Past Appointments

!	Fri 21-Feb-2020 at 14:40	RIDLEY, Ruth (Mrs)
D	Fri 21-Feb-2020 at 14:00	RIDLEY, Ruth (Mrs)
!	Fri 21-Feb-2020 at 10:50	RIDLEY, Ruth (Mrs)

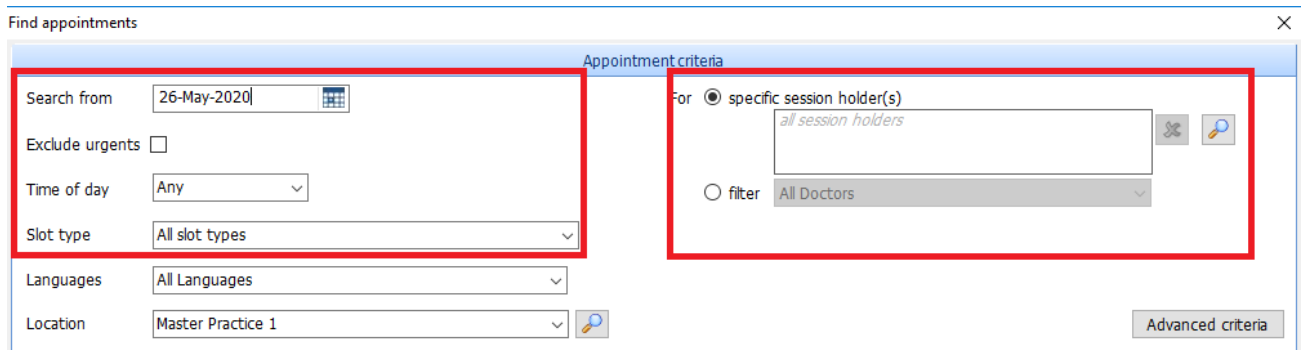
Book

Searching for an Available Appointment using Find Slot

1. Navigate to the **Appointment Book**, select **Find Slot**

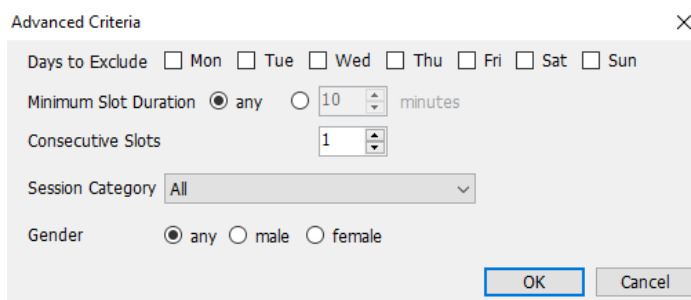


2. Specify your search criteria on the left, e.g. **Date**, **Time of Day** and **Slot Type**, and the options on the right for **Specific session holder** or **Filter** using your Session holder filters



Note: Advanced criteria will allow you to specify further criteria e.g.

- a. If the patient does not want an appointment on a particular day of the week tick the **Days to Exclude**
- b. The patient requires a double appointment, use the **Consecutive Slots** section and select **2**
- c. Click **OK**





3. Select the **Available appointment** as required and click **Book appointment**

Available appointments						
Date	At	Duration	Session holder(s)	Slot type	Session name	Location
Thu 28-May-2020	09:10	10 mins	HOLMES, Gary (Mr)	Default	Gary Test am	Master Practice 1
	09:20	10 mins	HOLMES, Gary (Mr)	Default	Gary Test am	Master Practice 1
	09:30	10 mins	HOLMES, Gary (Mr)	Blood Pressure Check	Gary Test am	Master Practice 1
	09:40	10 mins	HOLMES, Gary (Mr)	Default	Gary Test am	Master Practice 1
	09:50	10 mins	HOLMES, Gary (Mr)	Telephone Appointment	Gary Test am	Master Practice 1
	10:00	10 mins	HOLMES, Gary (Mr)	Telephone Appointment	Gary Test am	Master Practice 1
	10:00	10 mins	PURDY, Dawn (Miss)	Default	Morning Surgery	Master Practice 1
	10:00	10 mins	PLANK, Ade (Mr)	Online Appt - GP	Ade's Morning clinic	Master Practice 1
	10:10	10 mins	HOLMES, Gary (Mr)	Default	Gary Test am	Master Practice 1
	10:20	10 mins	HOLMES, Gary (Mr)	Default	Gary Test am	Master Practice 1
	10:20	10 mins	PURDY, Dawn (Miss)	Default	Morning Surgery	Master Practice 1
	10:20	10 mins	PLANK, Ade (Mr)	Default	Ade's Morning clinic	Master Practice 1

[Earlier appointments](#) [Later appointments](#)

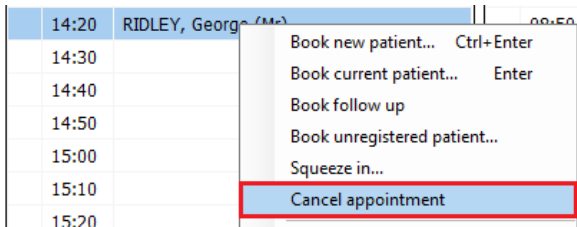
Clear appointment criteria **Book appointment** Cancel

4. Add the **Booking Details** as required and click **Book**

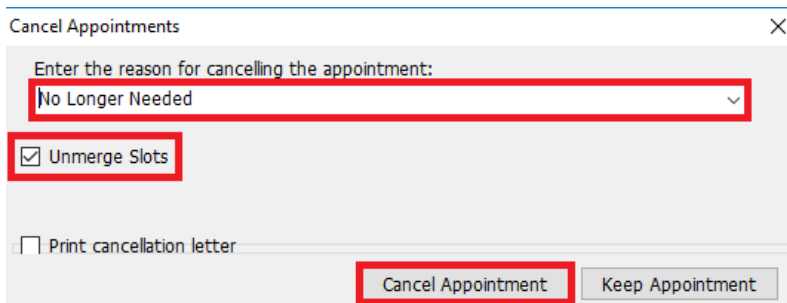
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Cancel an Appointment

1. Right click on the appointment and select **Cancel appointment**



2. Free text or select a **Reason** from the list as appropriate and click **Cancel appointment**. If this was a longer slot, you may get an option to **Unmerge Slots** back to their original duration



Cancel Appointments

Enter the reason for cancelling the appointment:

No Longer Needed

Unmerge Slots

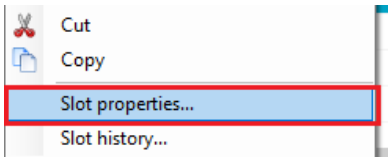
Print cancellation letter

Cancel Appointment Keep Appointment

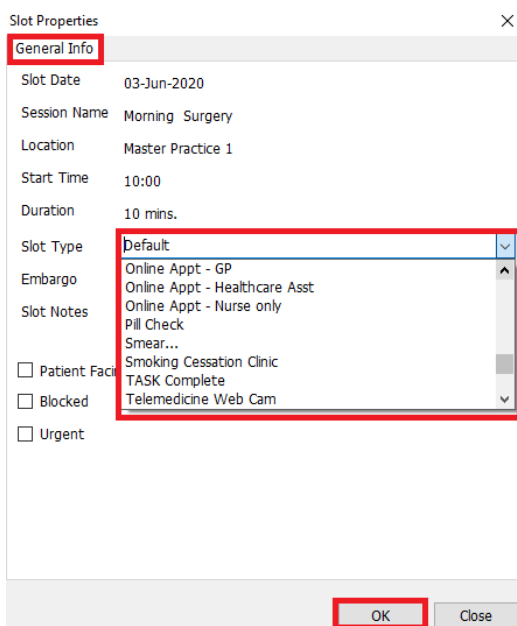
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Amend an Appointment/Slot

1. Right click the appointment or slot and click **Slot properties**



2. Under the **General Info** tab, you can change the **Slot Type** or add **Slot Notes**



3. Under the **Booking Info** tab you can add a **Reason** or **Notes**. Click **OK**



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Slot Properties

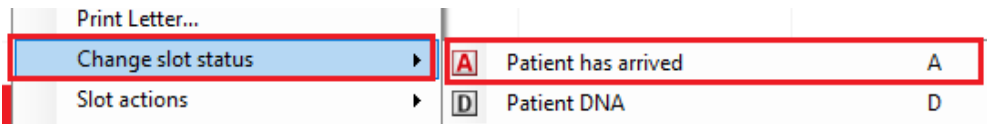
General Info **Booking Info**

Patient Name RIDLEY, Justin (Mr)
Calling Name Justin
Date of Birth 01-Jan-2010
Booked By BURN, Chris (Mrs)
Booking Time 29-May-2020 at 13:44
Reason
Notes
Arrived
Sent in
Left
Booking Method Practice

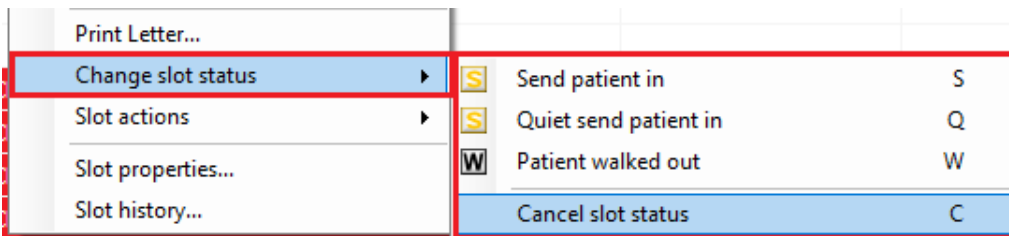
OK Close

Change Status of an Appointment

1. Right click on the appointment, click **Change slot status** and select **Patient has arrived**. You can also do this by selecting the appointment and press **A** on keyboard

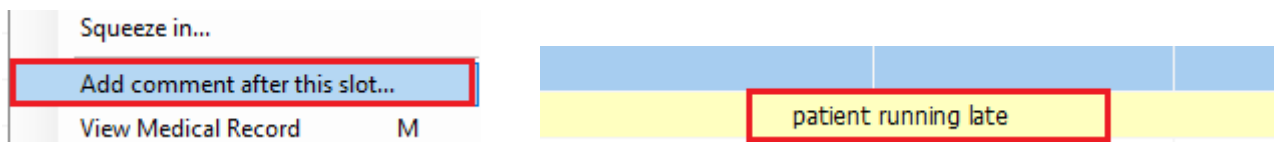


2. Once the patient is marked as arrived you can **Change slot status** to, **Send patient in (S)**, **Quiet send patient in (Q)**, **Patient walked out (W)** or **Cancel slot status (C)**



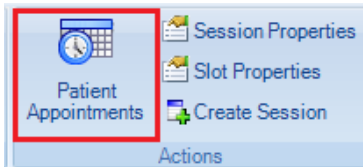
Add a Comment after an Appointment

1. Right click on the appointment and select **Add comment after this slot**. Type in the comment and click **OK**. This comment will display under the selected slot in the appointment book, but is not attached to the appointment

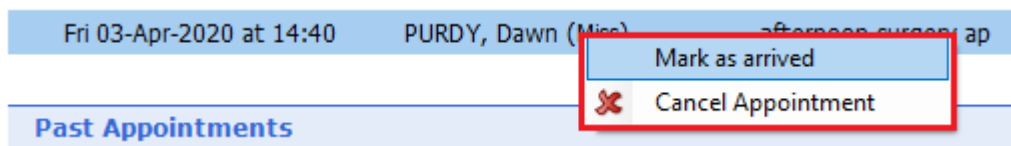


Searching for a Booked Appointment

1. Click **Patient Appointments** on the ribbon from within the appointment book



2. Search for and select the patient you wish to view appointments information for. The patient's future, past and cancelled appointments are displayed
3. If needed right click on an appointment and click either **Mark as arrived** or **Cancel Appointment**

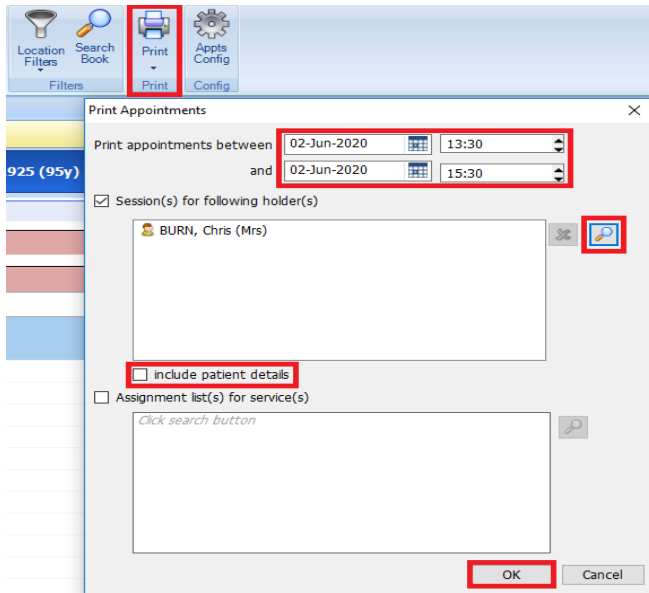


4. Click **Close** to return to the appointment book

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Printing Appointment Book

1. Click **Print** on the ribbon from within the appointment book



5. Select as required the dates, times and sessions details

6. Click **OK**

7. The selected appointments will open in a Word document

8. Click **Print**