



Partners in improving local health



North of England
Commissioning Support

NECS Clinical Systems Specialist Team

SystemOne - Appointment Booking Guide

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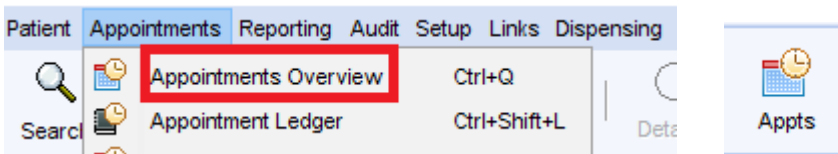
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Appointment Ledger or Appointment Overview

Appointments can be viewed, booked and managed from the **Appointment Ledger** or the **Appointment Overview** screen.

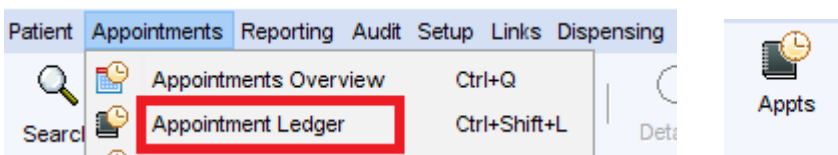
1. To open the **Appointment Overview** use the **Appointments** menu – or a shortcut button on your toolbar



2. To book an appointment double click over the chosen rota

The **Appointment Overview** is a zoomed out view of all the appointment rotas – depending on what is selected in the calendar, site and staff filter.

1. To open the **Appointment Ledger** use the **Appointments** menu – or a shortcut button on your toolbar

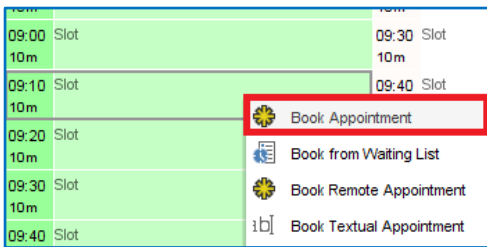


2. To book an appointment right click on a available slot

The **Appointment Ledger** allows you to see slot details/booking details without double-clicking – but you do have to use the scroll bars horizontally and vertically to see all appointments

Booking (standard duration)

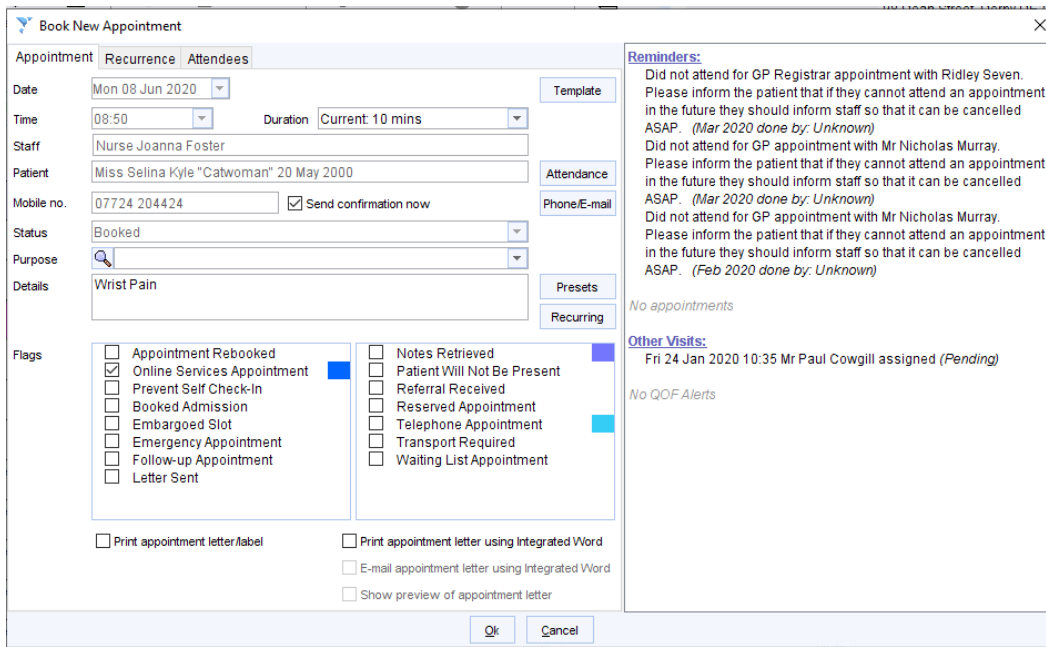
1. Access either **Appointment Ledger** or **Overview**
2. Find a free slot using the calendar and your staff selection options
3. Double click on the appropriate slot or right click and select **Book Appointment**



4. Search and select the appropriate patient

Note: The Book New Appointment dialogue will display with Reminders, Appointments, Visits and QOF Alerts listed on the right.

5. Confirm the appointment date/time and type any booking info in the **Details** field



6. Check **Send confirmation now** is ticked – you may not want it ticked for certain appointments e.g. telephone appointments



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Note: you can view the corresponding mobile number next to the Send confirmation now tick box. If you need to change or add a patient's mobile number click the **Phone/E-mail** button – adding or changing a contact number here will be added to the patient's record.

Patient	Miss Selina Kyle "Catwoman" 20 May 2000	Attendance
Mobile no.	07724 204424 <input checked="" type="checkbox"/> Send confirmation now	Phone/E-mail

7. Click **Ok** to confirm the appointment

Note: If you've sent an SMS confirmation there will be a separate window to confirm the SMS has been sent.

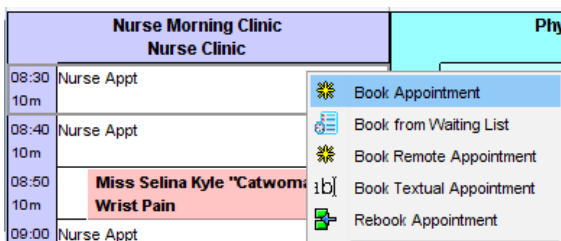
Booking a Double Appointment (Change Duration)

We previously looked at how to book an appointment without changing the slot size. In this example we will book an appointment that needs more time than the standard duration.

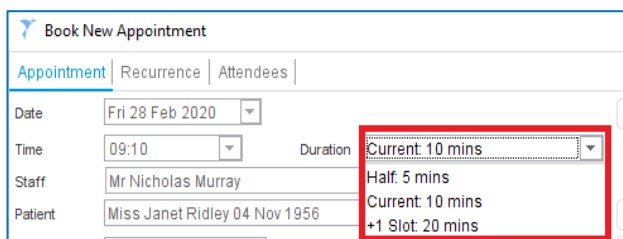
1. Access either **Appointment Ledger** or **Overview**
2. Find the relevant rota using the calendar and staff selection options
3. Find an available slot, and in this example because we want a double appointment we need to find 2 free slots next to each other.

Note: In order to expand the slot duration there needs to be available time in the rota. So if you wanted to book an hour slot, you'd have to find 6 x 10 minute slots free together.

4. Double click on the first slot or right click and select **Book Appointment**

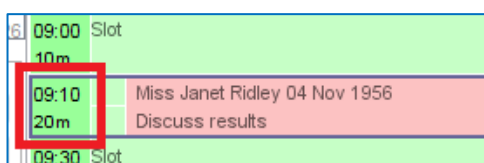


5. Click the **Duration** drop down menu and select the appropriate option



6. Complete the rest of the screen as before and click **Ok** to confirm the appointment

The slot will display the duration selected within the appointment ledger – the size of slot in the rota will not change, but the duration will display in the rota spine.

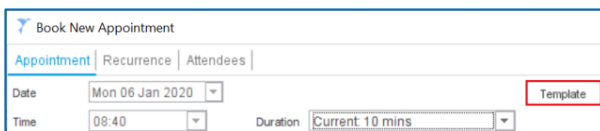


Booking using an Appointment Template

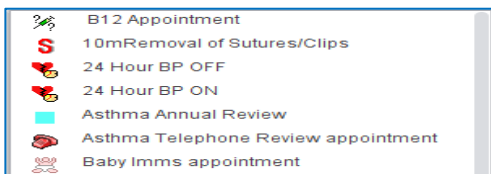
Appointment templates are used to set default booking information for certain appointments. These are useful for staff so they don't have to remember information like set durations or patient instructions for specific appointments.

For more information on how to set up appointment templates please refer to the Appointment Configuration Guide.

1. Follow the normal process to find and book the relevant appointment slot
2. Click **Template**

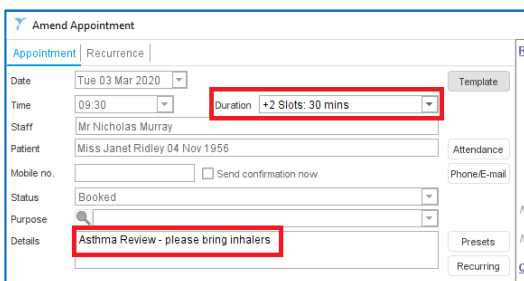


3. This will display a list of predefined appointment templates. Double click to select the one you require



The appointment duration, details and any appointment reminders will display

Note: If your selected appointment template requires an extended duration you will need to ensure there is the correct amount of free time available after your selected appointment. Otherwise the duration will not change and you will see an error message.

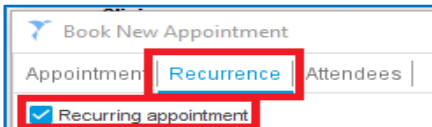


4. Click **Ok**

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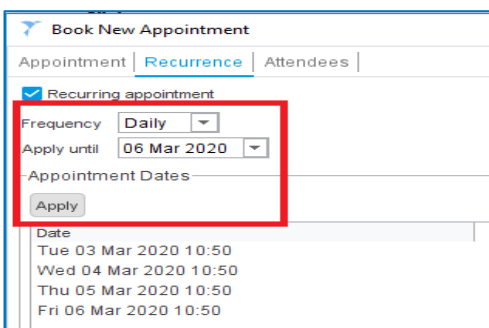
Booking a Recurring Appointment

1. Follow normal process to book the appointment
2. Click **Recurrence** and tick **Recurring appointment**

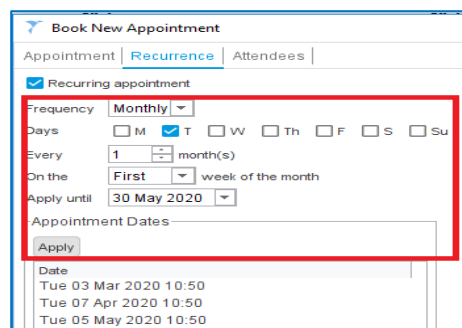


The screenshot shows the 'Book New Appointment' form with three tabs: 'Appointment', 'Recurrence', and 'Attendees'. The 'Recurrence' tab is selected. Below the tabs, the 'Recurring appointment' checkbox is checked.

3. Set the **Frequency** of the appointment, select the **Apply until** date and click **Apply**



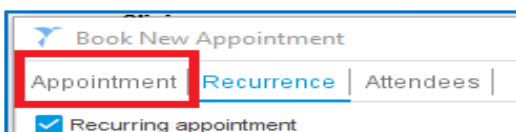
The screenshot shows the 'Book New Appointment' form with the 'Recurrence' tab selected. The 'Recurring appointment' checkbox is checked. The 'Frequency' is set to 'Daily' and the 'Apply until' date is '06 Mar 2020'. The 'Appointment Dates' section lists the following dates and times: Tue 03 Mar 2020 10:50, Wed 04 Mar 2020 10:50, Thu 05 Mar 2020 10:50, and Fri 06 Mar 2020 10:50.



The screenshot shows the 'Book New Appointment' form with the 'Recurrence' tab selected. The 'Recurring appointment' checkbox is checked. The 'Frequency' is set to 'Monthly' and the 'Apply until' date is '30 May 2020'. The 'Appointment Dates' section lists the following dates and times: Tue 03 Mar 2020 10:50, Tue 07 Apr 2020 10:50, and Tue 05 May 2020 10:50.

The system will list the dates it can find matching rotas and times

4. Click the **Appointment** tab and click **Ok** when done








The screenshot shows the 'Book New Appointment' form with three tabs: 'Appointment', 'Recurrence', and 'Attendees'. The 'Appointment' tab is selected. The 'Recurring appointment' checkbox is still checked.

The patient will now display in all rotas that the appointment was applied to

Booking a Textual Appointment

A Textual appointment is one not linked to a specific patient. You can free type the name of the patient and then link the appointment to a patient record later.

1. Access either **Appointment Ledger** or **Overview**
2. Find a free slot using the calendar and your staff selection options
3. Double click on the appropriate slot or right click and select **Book Textual Appointment**

08:50 10m	Nurse Appt	 Book Appointment
09:00 10m	Nurse Appt	 Book from Waiting List
09:10 10m	Nurse Appt	 Book Remote Appointment
09:20 10m	Nurse Appt	 Book Textual Appointment
		 Rebook Appointment

4. The Book New Appointment screen is the same as for a normal appointment apart from the **Patient** field – this is where the cursor should be. Enter some text.

Book New Appointment

Appointment | Recurrence | Attendees

Date: Fri 05 Jun 2020 Template


Time: 08:50 Duration: Current: 10 mins

Staff: Nurse Joanna Foster

Patient: Marilyn Monroe Attendance

Mobile no. Send confirmation now Phone/E-mail

Status: Booked

Purpose:  Presets

Details: Recurring

5. Complete the rest of the screen as normal and click **Ok** to book

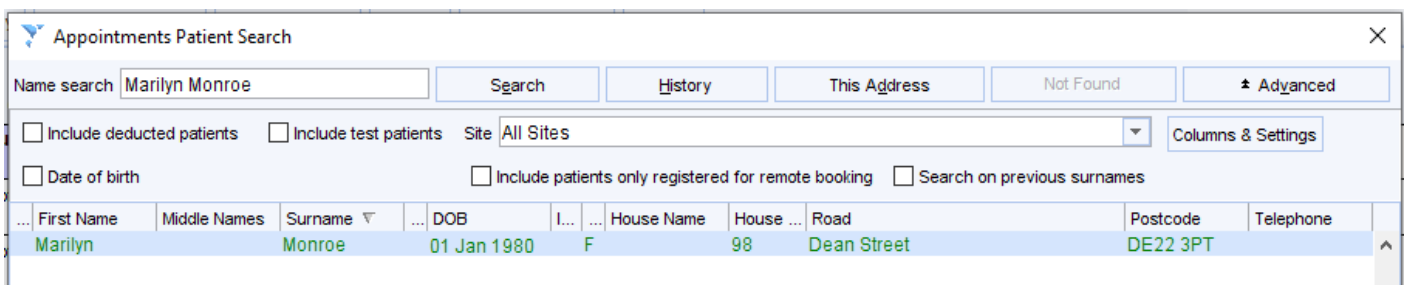
08:40 10m	Nurse Appt
08:50 10m	Marilyn Monroe Needs medication
09:00 10m	Nurse Appt

6. When you can link the appointment to a patient record right click the appointment and select **Assign to Patient**

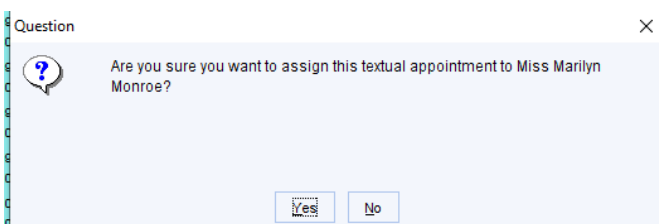
Note: Until you assign the appointment to a patient, some usual options in the appointment menu will be unavailable.



7. The name from your textual appointment will show in the patient search – select the relevant patient’s record

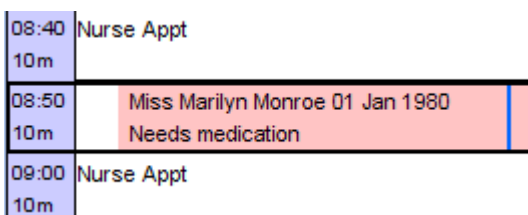


8. Click **Ok**



9. Click **Yes** to confirm

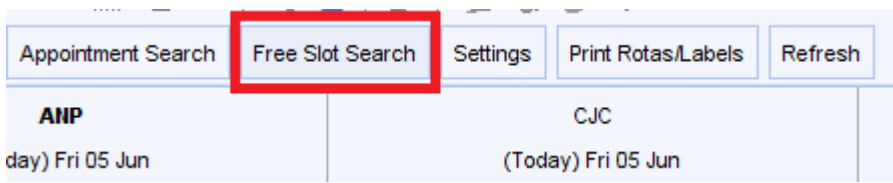
The appointment will now look like a standard appointment.



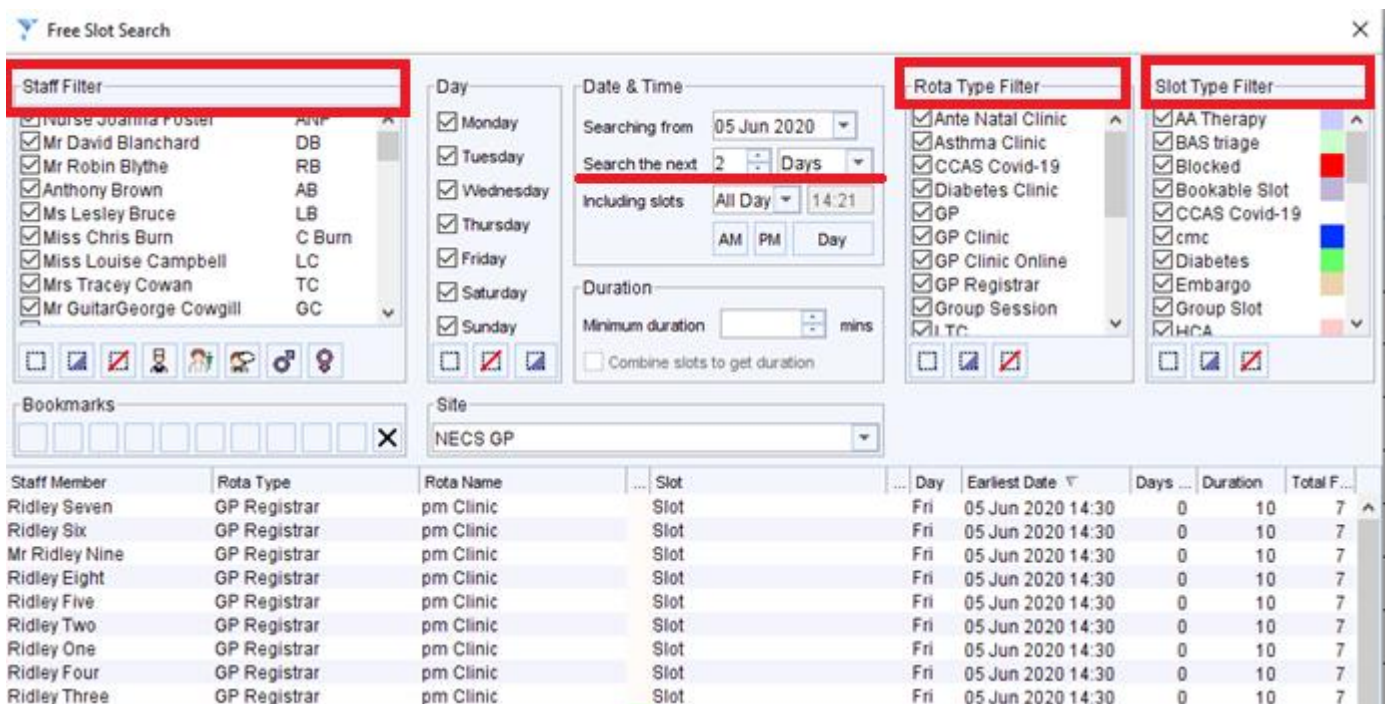
Booking using the Free Slot Search

Using the Free Slot Search to book appointments can often be a lot quicker than finding a free slot through the appointment ledger or overview. However it works better if you set it up with bookmarks - we'll look at how to use it without bookmarks first.

1. Access either **Appointment Ledger** or **Overview**
2. Click the **Free Slot Search** button

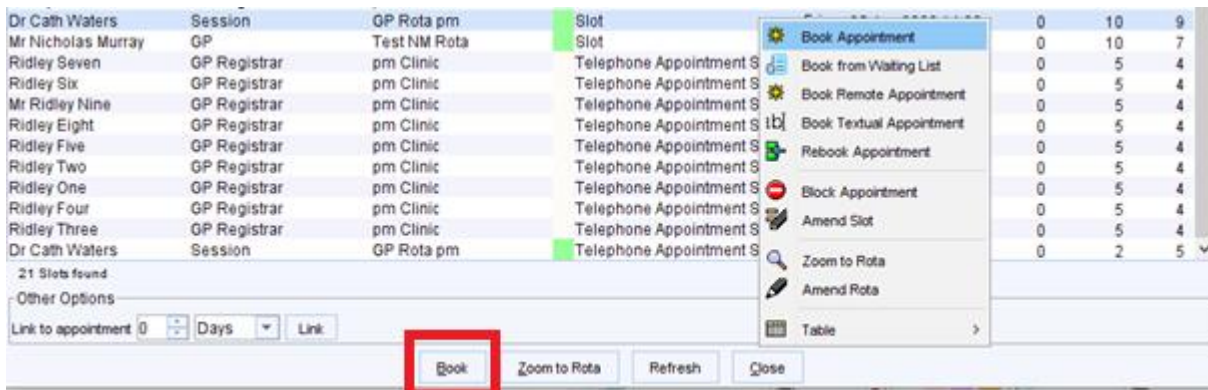


3. The free slot search window opens – by default all clinicians, all rota types and all session types are selected. The next free appointments are displayed – the date range by default is usually for the **next 2 days**



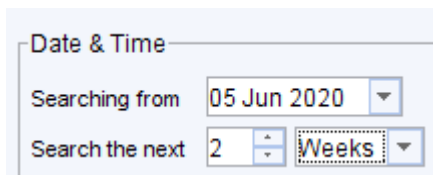
4. If there is an appropriate free slot available you can right click to book as normal, or use the **Book** button at the bottom

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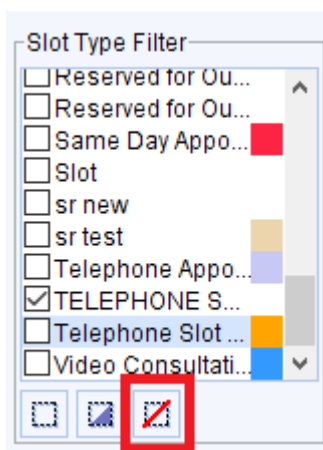
Note: If you want to see all of the available slot times for that clinic you can use the **Zoom to Rota** option.

- If the appointment slots you wanted aren't showing you need to change the filters. The first one probably to change is the date range – increase the date range to Search for the **next 2 weeks**



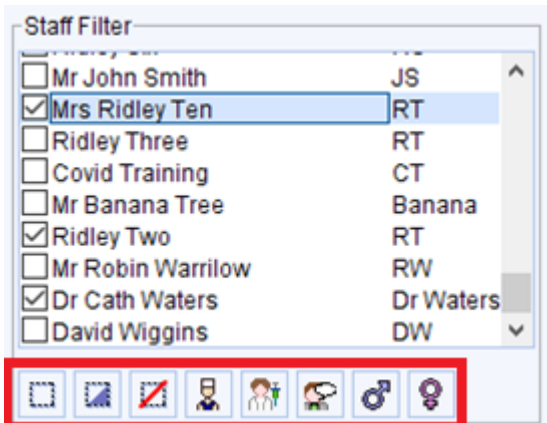
- The next thing you might want to consider is **Slot type** – are you only interested in a certain type, e.g. pre-bookable or telephone appointment?

Remember to use the **Clear selection** button – to untick everything, and then you can just tick the types you want to include.

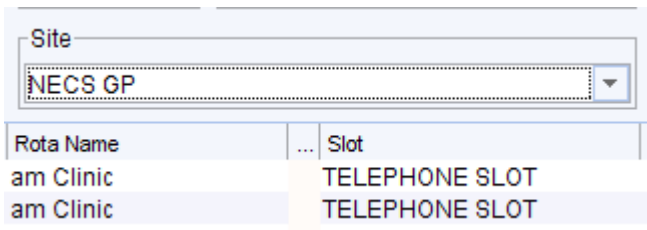


- You may also change which staff are selected, again remember to use the clear selection button to start with no one ticked – or try using the staff role or gender selection options

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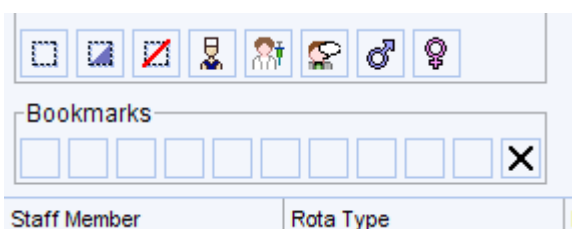
Note: Remember to also check the correct Site is selected.



Using Free Slot Search Bookmarks

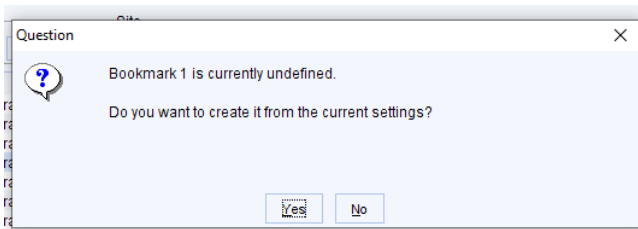
The quickest way of using the Free Slot Search is to set up bookmarks.

The bookmarks are displayed with numbers under the staff filter list. If there are no numbers you have no bookmarks set up.

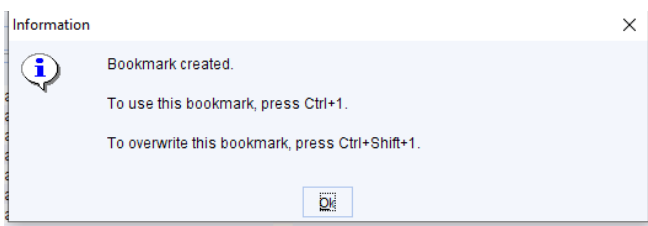


1. To set up a bookmark you have to set the filters as you want them. For example if you want a bookmark to show you all available nurse appointments for the next month, you would need to set the staff filter to include all of your nurses, the date filter to cover the next 4 weeks, and specific slot types in the slot filter if appropriate
2. Click the next empty square in the bookmarks section

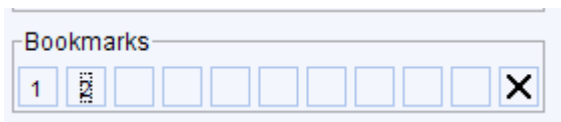
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3. Click **Yes** to the confirmation message – at this point you may want to make sure you have noted down what is included in this bookmark. E.g. Bookmark 1 = Nurse Appointments next 4 weeks



4. Click **Ok**
5. Repeat this process for every bookmark you would like – to a maximum of 10

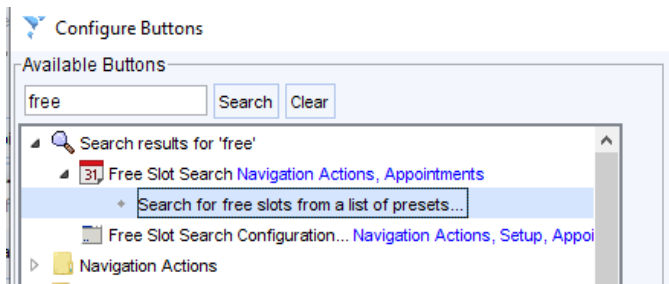


If you want to share your Free Slot bookmarks with other staff you can do that by getting them to copy your user preferences – through the **User Menu – User Preferences**. However this will copy ALL of your preferences and settings.

Another option would be to configure **Free Slot Search Presets** – this can be done through **Setup – Appointments – Free Slot Search Configuration**. You can create your presets based on your bookmarks – and this way you can name them appropriately e.g. Nurse Appts next 4 weeks.

Once you have created Free Slot Search Presets, you have to add a Free Slot Search icon to your toolbar configuration. When you add the Free slot search – make sure you choose the option to **Search for Free Slots from a List of Presets**.

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






For more information on this refer to the separate guide on Free Slot Search Configuration.

Insert Appointment

Sometimes during a clinic you need to add an additional appointment, possibly the clinician has agreed to see an extra patient.

1. Right click over the appointment you want to insert the appointment after and select **Insert Appointment**

Nurse Morn			
Nurse C			
08:30	Miss Janet Riddle		
5m	Wrist pain		Insert Appointment
08:35	Mr Jon Bonjov		Arrived
5m	urgent		Waiting
08:40	Miss Wednesda		In Progress
10m	Headaches		Finished

2. The patient search screen will open for you to search for and select the patient
3. Complete the appointment booking screen as normal
4. The new appointment will appear, and it will share the appointment duration of the previous appointment.

Note: If the appointment you inserted is cancelled, the empty slot will remain, so you'd have to amend the previous appointment to extend the duration again.

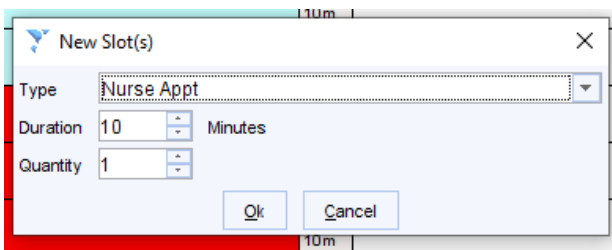
Extend Rota

Another option for adding additional appointment slots is to use the extend start or end. This option will add one or more slots to the beginning or end of the existing rota.

1. Right click over the rota header for the clinic you want to add an additional appointment to



2. Select **Extend Start** or **Extend End** – depending on whether you want to add an additional slot to the beginning or the end of the clinic
3. The New Slot window is displayed, select a type of slot and duration. Set a quantity if you need to add more than one.



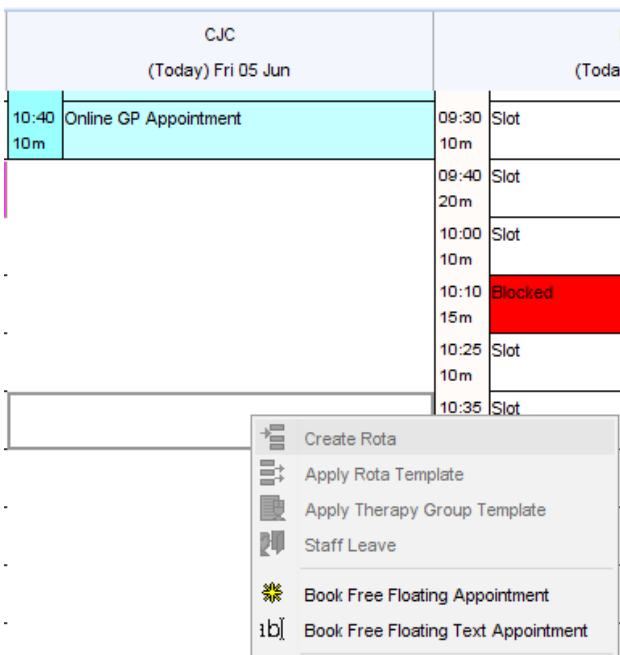
4. Click **Ok**

The new slots are added and available to be booked.

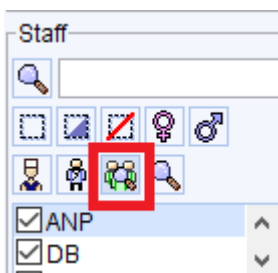
Insert a Free Floating Appointment

In some circumstances you may want to book an appointment outside of an existing clinic. As with most appointment rota changes please don't do this unless you are sure the clinician is aware.

1. To book a free floating appointment right click over an empty space underneath a clinician's header – this may be underneath an existing rota



Note: If the clinician does not already have a rota on the day, you may need to select the Only Show staff with Rotas toggle button, in the staff filter list.



2. Click **Book Free Floating Appointment**
3. Search for and select the patient as normal
4. Complete the **book appointment** screen – it may look slightly different with no SMS option, but you can complete booking details as normal

Note: You can send an SMS reminder after the appointment has been booked.

Book New Free Floating Appointment

Time: 08 Jun 2020 08:00 to 08:30

Site: NECS GP

Staff: Mrs Claire Crossley

Patient: Miss Selina Kyle "Catwoman" 20 May 2000

Status: Booked

Purpose: Urgent Meds

Details: Urgent Meds

Flags:

<input type="checkbox"/> Appointment Rebooked	<input type="checkbox"/> Notes Retrieved
<input type="checkbox"/> Online Services Appointment	<input type="checkbox"/> Patient Will Not Be Present
<input type="checkbox"/> Prevent Self Check-In	<input type="checkbox"/> Referral Received
<input type="checkbox"/> Booked Admission	<input type="checkbox"/> Reserved Appointment
<input type="checkbox"/> Embargoed Slot	<input type="checkbox"/> Telephone Appointment
<input type="checkbox"/> Emergency Appointment	<input type="checkbox"/> Transport Required
<input type="checkbox"/> Follow-up Appointment	<input type="checkbox"/> Waiting List Appointment
<input type="checkbox"/> Letter Sent	

Print confirmation Print confirmation letter using Integrated Word

Reminders:
Did not attend for GP Registrar appointment with Ridley Seven. Please inform the patient that if they cannot attend an appointment
Did not attend for GP appointment with Mr Nicholas Murray. Please inform the patient that if they cannot attend an appointment
Did not attend for GP appointment with Mr Nicholas Murray. Please inform the patient that if they cannot attend an appointment

No appointments

Other Visits:
Fri 24 Jan 2020 10:35 Mr Paul Cowgill assigned (Pending)

No QOF Alerts

Ok Cancel

- If you need to change the appointment duration – enter an end time for the appointment at the top

Book New Free Floating Appointment

Time: 05 Jun 2020 08:00 to 09:00

- Click **Ok** to book

Note: If you need to cancel a free floating appointment you will need to cancel the free floating rota as well. See the separate guide on Appointment Configuration for more help.