



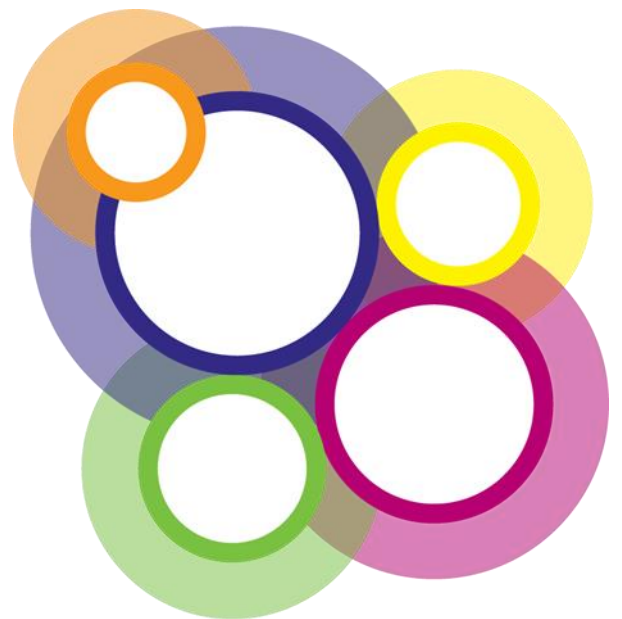
North of England
Commissioning Support

Partners in improving local health

NECS Clinical Systems Specialist Team

SystemOne - Appointment Reports and Audits Guide

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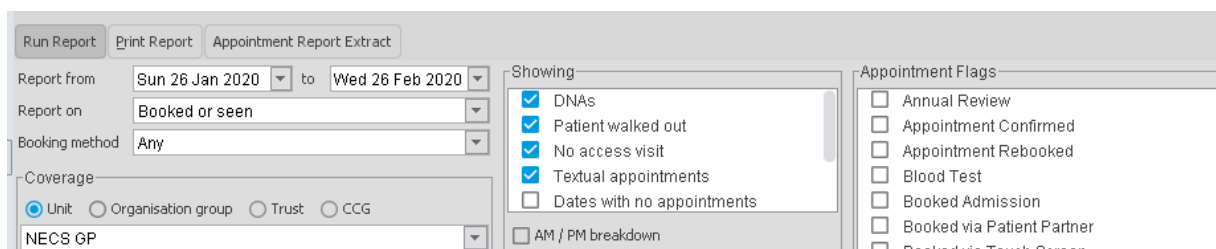
Appointment Report

This report lists all appointments at your organisation according to the criteria you have selected. It is also possible to report on organisation groups you belong to that have been set up to allow reporting over the group.

1. Click **Reporting** on the menu bar.
2. Select **Appointment Reports**. This will allow you to select any of the pre-created Appointment reports, such as Appointment Report, Cancelled Rota Report and Appointment Statistics.
3. Select **Appointment Report**.



4. Set the required **Report from** and **to** dates (within a 31 day period).
5. Select what you want to report on e.g. Booked or seen, Cancelled by unit etc. Select a **Booking method** if required.
6. Select **Coverage**.
7. Select the relevant items you want to show by selecting them in the **Showing** box.
8. Select any **Appointment Flags** required.



The screenshot shows the configuration form for the Appointment Report. It includes the following fields and options:

- Run Report** (button), **Print Report** (button), **Appointment Report Extract** (button)
- Report from**: Sun 26 Jan 2020 to Wed 26 Feb 2020
- Report on**: Booked or seen
- Booking method**: Any
- Coverage**:
 - Unit
 - Organisation group
 - Trust
 - CCG
 - NECS GP
- Showing**:
 - DNAs
 - Patient walked out
 - No access visit
 - Textual appointments
 - Dates with no appointments
 - AM / PM breakdown
- Appointment Flags**:
 - Annual Review
 - Appointment Confirmed
 - Appointment Rebooked
 - Blood Test
 - Booked Admission
 - Booked via Patient Partner
 - Booked via Touch Screen

- Click **Run Report** to view the results. **Print Report** will open in Word for you to print the report. **Appointment Report Extract** will allow you to save the report extract.

Date	Textual	DNA	Walked Out	No Access V...	Number of Appointments
03 Feb 2020	1	3	0	0	3
10 Feb 2020	0	7	0	0	16
11 Feb 2020	0	4	0	0	16
12 Feb 2020	0	3	0	0	14
13 Feb 2020	0	4	0	0	10

Waiting Time Report

For this report, SystemOne searches for all appointments between the dates specified and gives the average waiting time. The waiting time starts at the time the appointment was due to begin and ends when the consultation is marked as being In Progress.

- Click **Reporting** on the menu bar.
- Select **Waiting Time Report**.
- Set the required **Report from** and **to** dates (maximum of three months).
- Select a **Staff Member**, **Rota Type**, **Branch** if required.
- Click **Run Report** to view the results.

Branch	Staff	Rota Type	Total Appointments	Delayed Appointments	Total Waiting Time (min)	Average Wait for All ...	Average Wait for Del...
Main Site	Covid Training	CCAS Covid-19	3	2	0	0	0
Main Site	Dr Cath Waters	Session	7	3	1	0.1	0.3
Main Site	Miss Dawn Purdy	GP	1	0	0	0	0
Main Site	Mr Nicholas Murray	GP	1	1	7	7	7
Main Site	Miss Chris Burn	TELEPHONE APPOINTMENTS	1	1	0	0	0
Main Site	Mr Adrian Plank	GP	5	5	0	0	0
Main Site	Ridley Two	GP Registrar	1	1	0	0	0
Main Site	Ridley One	GP Registrar	3	0	0	0	0

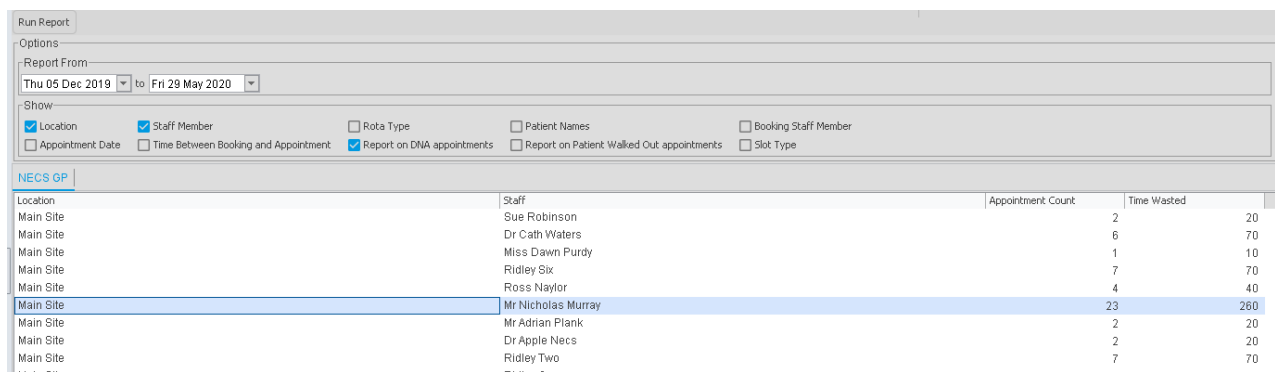
DNA & Patient Walked Out Report

This report allows you to report on:

- DNAs, and/or
- appointments where the patient walked out

SystemOne searches through all appointment slots at all sites belonging to your organisation between the dates specified, looking for slots that have been marked with the 'DNA' and/or 'Patient Walked Out' flags. You can report on a period of up to six months.

1. Click **Reporting** on the menu bar.
2. Select **DNA & Patient Walked Out Report**.
3. Set the required **Report from** and **to** dates.
4. Select any required options in the **Show** section, e.g. Location, Staff Member etc.
5. Click **Run Report** to view the results.



The screenshot shows the 'Run Report' interface. Under the 'Options' section, the 'Report From' date is 'Thu 05 Dec 2019' and the 'to' date is 'Fri 29 May 2020'. The 'Show' section has several checkboxes: 'Location' (checked), 'Staff Member' (checked), 'Rota Type' (unchecked), 'Patient Names' (unchecked), 'Booking Staff Member' (unchecked), 'Appointment Date' (unchecked), 'Time Between Booking and Appointment' (unchecked), 'Report on DNA appointments' (checked), 'Report on Patient Walked Out appointments' (unchecked), and 'Slot Type' (unchecked).

Location	Staff	Appointment Count	Time Wasted
Main Site	Sue Robinson	2	20
Main Site	Dr Cath Waters	6	70
Main Site	Miss Dawn Purdy	1	10
Main Site	Ridley Six	7	70
Main Site	Ross Naylor	4	40
Main Site	Mr Nicholas Murray	23	260
Main Site	Mr Adrian Plank	2	20
Main Site	Dr Apple Necs	2	20
Main Site	Ridley Two	7	70

Unused Slots Report

For this report, SystemOne searches through all appointment slots at all sites belonging to your organisation between the dates specified. You can report on a period of up to three months.

1. Click **Reporting** on the menu bar.
2. Select **Unused Slots Report**.
3. Set the required **Report from** and **to** dates.
4. Select **On Rota Types** or leave as **All Rota Types**.
5. Select any required options in the **Show** section, e.g. Staff Member, Rota Type etc.

6. Click **Run Report** to view the results.

Run Report

Options

Report From: Wed 29 Apr 2020 to Fri 29 May 2020 On Rota Types: All Rota Types

Show: Staff Member Rota Type Branch Rota Time Fully Booked Rotas Slot Type

NECS GP

Staff	Total Slots	Unused Slots	Unused Slots %	Total Duration	Unused Duration	Unused Duration %
Nurse Joanna Foster	71	71	100	690	690	100
Covid Training	357	354	99.2	10710	10620	99.2
Dr Cath Waters	1288	1284	99.7	9200	9160	99.6
Miss Dawn Purdy	390	388	99.5	3640	3620	99.5
Ridley Six	874	874	100	8050	8050	100
Ross Naylor	24	24	100	240	240	100
Mr Nicholas Murray	1012	1011	99.9	9430	9420	99.9
Miss Chris Burn	6	5	83.3	65	55	84.6
Mr Adrian Plank	612	609	99.5	5700	5670	99.5
Ridley Two	874	874	100	8050	8050	100
Ridley One	989	988	99.9	8970	8960	99.9

Appointment Availability Report

This report lists the number of appointments available at your organisation broken down by rota type and slot type (regular, embargoed, telephone). It also includes customised slot types configured using Appointments Settings.

1. Click **Reporting** on the menu bar.
2. Select **Appointment Availability Report**.
3. Set **Figures for the next**, e.g. 1 Month, 2 Weeks.
4. Select a **Branch** if required or leave as **All sites**.
5. Select how you want to **Show the figures**, Daily, Weekly or Monthly.
6. Click **Run Report** to view the results.

Run Report

Total Availability | Nth Free Slot

Report Options

Figures for the next: 1 Month(s)

Branch: NECS GP

Show daily figures Show days/weeks/months without rotas

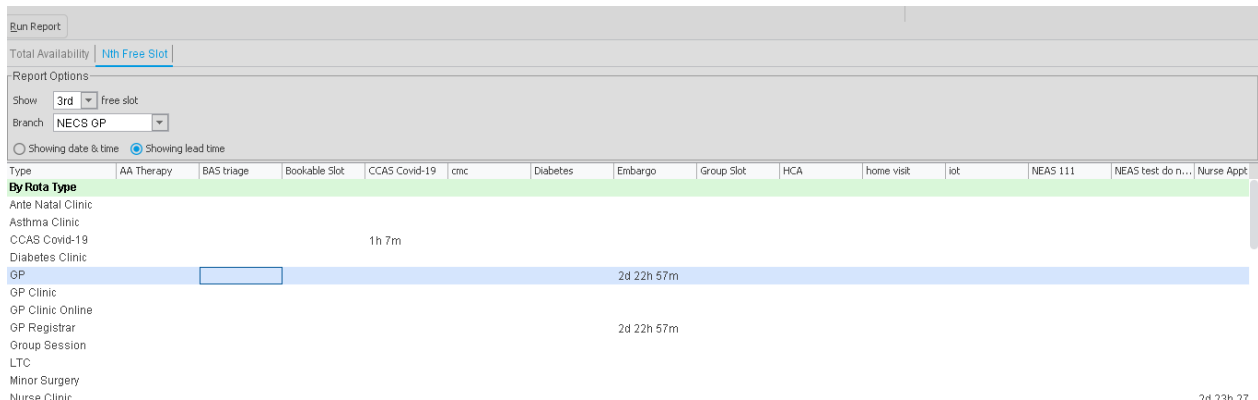
Show weekly figures Split embargoed slots by their embargo duration

Show monthly figures

By Rota Type	Period	Date	AA Therapy	BAS triage	Bookable Slot	CCAS Covid-19	cmc	Diabetes	Embargo	Group Slot	HCA	home visit	lot
+ GP	Week	30 May 2020 - 31 May 2020	0	0	0	0	0	0	0	0	0	0	0
+ GP Registrar	Week	01 Jun 2020 - 07 Jun 2020	0	0	0	0	0	0	85	0	0	0	0
+ Nurse Clinic	Week	08 Jun 2020 - 14 Jun 2020	0	0	0	0	0	0	85	0	0	0	0
+ Session	Week	15 Jun 2020 - 21 Jun 2020	0	0	0	0	0	0	100	0	0	0	0
	Week	22 Jun 2020 - 28 Jun 2020	0	0	0	0	0	0	75	0	0	0	0
TOTAL		30 May 2020 - 30 Jun 2020	0	0	0	0	0	0	375	0	0	0	0

7. Click on the **Nth Free Slot** tab. This report allows you to find out the lead time or date and time of your organisation's *nth* free slot of any type,
8. Select which **free slot** you want to show.

9. Select a **Branch** if required.
10. Select **Showing date & time** or **Showing lead time**.
11. Click **Run Report** to view the results.



Run Report

Total Availability | [Nth Free Slot](#)

Report Options

Show: 3rd | free slot

Branch: NECS GP

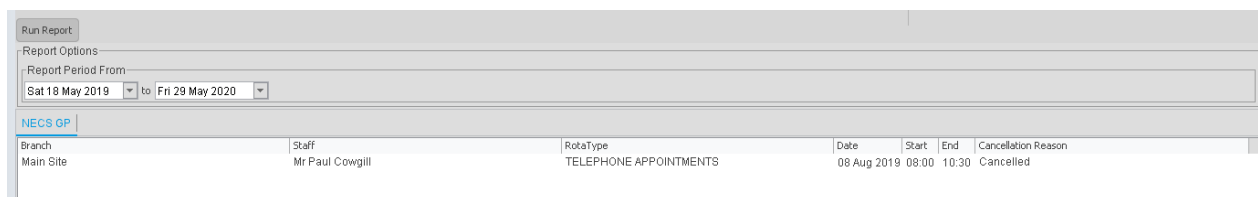
Showing date & time Showing lead time

Type	AA Therapy	BAS triage	Bookable Slot	CCAS Covid-19	cmc	Diabetes	Embargo	Group Slot	HCA	home visit	iot	NEAS 111	NEAS test do n...	Nurse Appt
By Rota Type														
Ante Natal Clinic														
Asthma Clinic														
CCAS Covid-19					1h 7m									
Diabetes Clinic														
GP								2d 22h 57m						
GP Clinic														
GP Clinic Online														
GP Registrar								2d 22h 57m						
Group Session														
LTC														
Minor Surgery														
Nurse Clinic														

Cancelled Rota Report

This report lists all cancelled rotas between the dates specified.

1. Click **Reporting** on the menu bar.
2. Select **Cancelled Rota Report**.
3. Set the required **Report Period From**.
4. Click **Run Report** to view the results.



Run Report

Report Options

Report Period From: Sat 18 May 2019 to Fri 29 May 2020

NECS GP

Branch	Staff	RotaType	Date	Start	End	Cancellation Reason
Main Site	Mir Paul Cowgill	TELEPHONE APPOINTMENTS	08 Aug 2019	08:00	10:30	Cancelled

Booked Admissions Report

This report is only relevant to PCTs and organisations that host remote booking clinics.

1. Click **Reporting** on the menu bar.
2. Select **Booked Admissions Report**.
3. Select the **Report period** and the **year**. Choose whether to **Include all appointments booked** or **Include only appointments booked using Remote Booking**.
4. Select the required **Report Coverage**.
5. Click **Run Report** to view the results.

Run Report					
Report Options		Report Coverage			
Report period	May 2017	<input checked="" type="radio"/> Unit	<input type="radio"/> Organisation group	<input type="radio"/> Trust	<input type="radio"/> CCG
<input checked="" type="radio"/> Include all appointments booked <input type="radio"/> Include only appointments booked using Remote Booking		NECS GP			
NECS GP					
Item	Session	GP Clinic Online	GP	Total	
Patients With an Appointment In The Future	0	0	0	0	
Patients With an Appointment In The Future With a Booked Date (i.e. has the 'Booked Admission' flag set)	0	0	0	0	
Item	Session	GP Clinic Online	GP	Total	
Total Number of Patients Seen During Month	2	1	0	3	
Total Number of DNAs During Month	10	0	2	12	
Total Number of Patient Cancellations During Month	1	0	0	1	
Total Number of Hospital Cancellations During Month	0	0	0	0	
Total Number of Patients Seen During Month With a Booked Date	0	0	0	0	
Number of Booked Date Patients Seen On Original Appointment Date During Month	0	0	0	0	
Item	Session	GP Clinic Online	GP	Total	
Number of Patients Given a Booked Date During Month	0	0	0	0	

Booking Report

This screen allows you to report on the various data for finished appointments within the specified date range, including Days in advance booked, demand and demographics.

1. Click **Reporting** on the menu bar.
2. Select **Booking Report**.
3. Set the required **Report from** and **to** dates.
4. Select how you want the report **Breaking down by**.
5. Click **Run Report** to view the results.

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Run Report

Shows the number of finished appointments that have happened within the given date range by patient age and sex.

Report from to

Breaking down by Days in advance Times Postcode
 Demand Demographic Appointments By Staff

Age Range	Males	Females	Total
0 - 5	0	0	
5 - 15	2	1	
15 - 25	0	7	
25 - 35	1	7	
35 - 45	4	7	
45 - 55	16	1	
55 - 60	0	0	
60 - 75	17	15	

Appointment Statistics Report

This screen allows you to produce the following statistics for finished appointments:

- a. average number of appointments per hour
- b. total appointment turnaround times
 - i. from the booked appointment start time to the time the consultation actually began
 - ii. from the patient's actual arrival time to the time the consultation began.
- c. number of appointments by age/sex

1. Click **Reporting** on the menu bar.
2. Select **Appointment Statistics Report**.
3. Set the required **Report on Appointments Between** dates (maximum three months).
4. Click **Run Report** to view the results.

Run Report

Report Options

Report on Appointments Between and

Average number of appointments per hour

Time	Weekday	Weekend	Public Holiday
7-8am	0	0	0
8-9am	7	0	0
9-10am	5	0	0
10-11am	5	0	0
11am-noon	10	0	0

Total appointment turnaround times

Duration	Count	Count
Up to 1 hour	36	34
1 to 2 hours	0	0
2 to 3 hours	0	0
3 to 4 hours	1	1
Over 4 hours	0	2

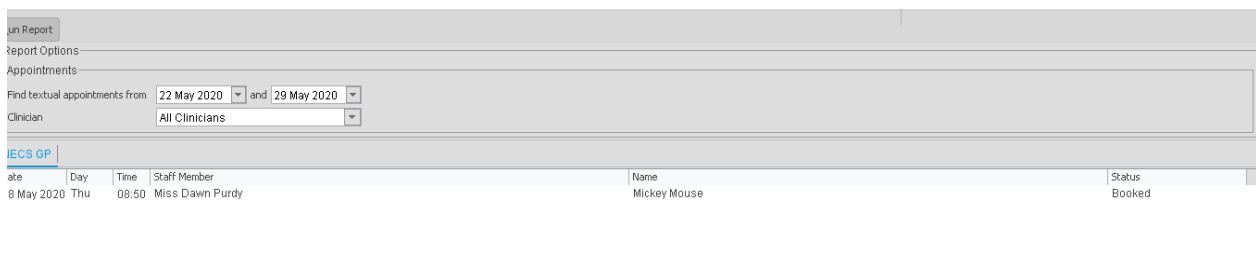
Number of appointments by age/sex group

Age	Male	Female
Under 12 months	0	0
1 to 4 years	0	0
5 to 16 years	2	1
17 to 25 years	0	3
26 to 35 years	0	1
36 to 45 years	0	3

Textual Appointment Report

This report allows you to create a list of all textual appointments booked within the specified period.

1. Click **Reporting** on the menu bar.
2. Select **Textual Appointment Report**.
3. Set the required **Find textual appointments from** and **to** dates. (You can only report on one week at a time).
4. Select the required **Clinician** or leave as **All Clinicians**.
5. Click **Run Report** to view the results.



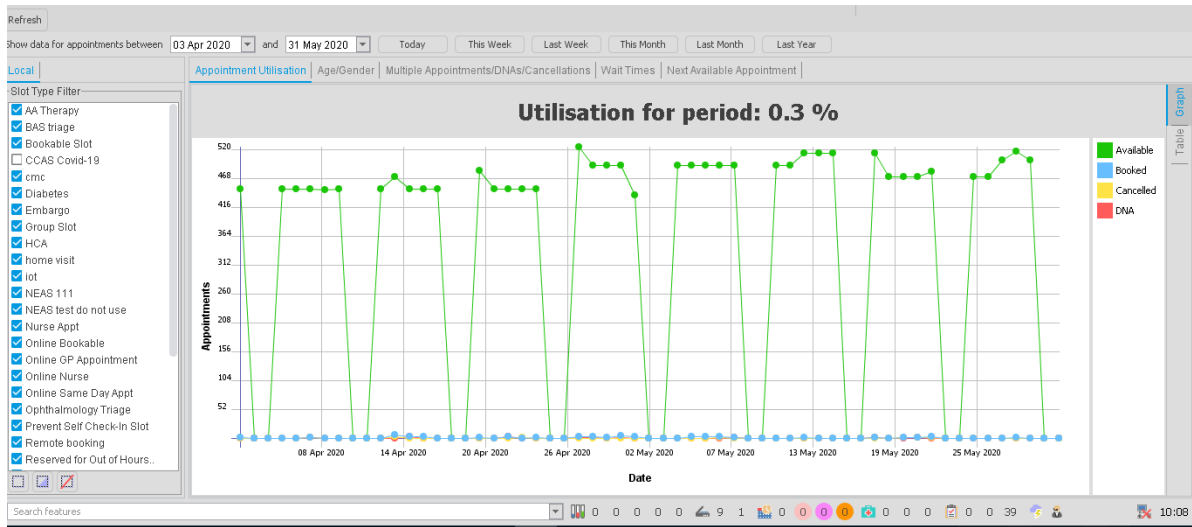
The screenshot shows a web interface for generating a textual appointment report. It includes a 'Run Report' button, a 'Report Options' section, and an 'Appointments' section. The 'Appointments' section has two dropdown menus: 'Find textual appointments from' set to '22 May 2020' and 'and' set to '29 May 2020', and 'Clinician' set to 'All Clinicians'. Below this is a table with columns for 'Date', 'Day', 'Time', 'Staff Member', 'Name', and 'Status'. The table contains one row of data: '8 May 2020', 'Thu', '08:50', 'Miss Dawn Purdy', 'Mickey Mouse', and 'Booked'.

Date	Day	Time	Staff Member	Name	Status
8 May 2020	Thu	08:50	Miss Dawn Purdy	Mickey Mouse	Booked

Appointment Utilisation Report

1. Click **Reporting** on the menu bar.
2. Select **Appointment Utilisation Report**.
3. Set the required **Show data for appointments between from** and **to** dates or Select one of the duration buttons, e.g. Today, This Week etc.
4. Select a **Slot Type Filter** from the Local section on the left.
5. Select the required tab on the right, e.g. Appointment Utilisation, Age/Gender etc.
6. Select **Table** or **Graph** from the tab on the far right.
7. Click **Refresh** to view the results.

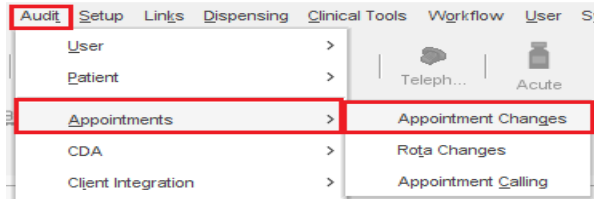
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Audit - Appointment Changes

1. Click **Audit – Appointments** from the menu bar. This will allow you to run audits on Appointment Changes, Rota Changes and Appointment Calling.
2. Select **Appointment Changes**.



3. Select an **Appointment date** and an **Appointment time**.
4. Select a **Staff member** and either **Search on appointment as they are now** or **Search on any past version of the appointment**.
5. Click **Refresh**.



6. The results will then display.



Date	Start	End	Duration	Staff	Patient Name	Status	Deleted	Last Amended By	Last Amended
14 Feb 2020	08:50	09:00	10	Mr Nicholas Murray	Miss Selina Kyle "Catwoman" 20 May 2000	Did Not Attend	<input type="checkbox"/>		14 Feb 2020 22:52
14 Feb 2020	14:20	14:30	10	Ridley Seven	Mr William Ridley 19 Apr 1967	Finished	<input type="checkbox"/>	Ridley Seven	14 Feb 2020 15:08
14 Feb 2020	14:20	14:30	10	Ridley Six	Miss Vicky Ridley 07 Feb 1978	In Progress	<input type="checkbox"/>	Ridley Six	14 Feb 2020 15:19
14 Feb 2020	14:20	14:30	10	Ridley Five	Mr Paul Ridley 19 Oct 1945	Arrived	<input type="checkbox"/>	Ridley Five	14 Feb 2020 15:20
14 Feb 2020	14:20	14:30	10	Ridley Two	Miss Dawn Ridley 17 Aug 1986	In Progress	<input type="checkbox"/>	Ridley Two	14 Feb 2020 15:20
14 Feb 2020	14:20	14:30	10	Ridley Four	Miss Karen Ridley 12 Dec 1935	Finished	<input type="checkbox"/>	Ridley Four	14 Feb 2020 15:21
14 Feb 2020	14:20	14:30	10	Ridley Three	Miss Janet Ridley 04 Nov 1956	Finished	<input type="checkbox"/>	Ridley Three	14 Feb 2020 15:57

Audit – Rota Changes

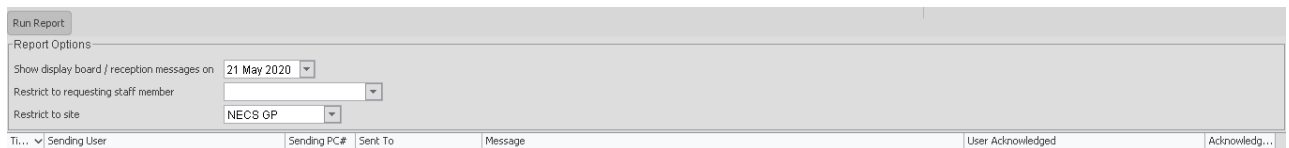
1. Click **Audit – Appointments** from the menu bar.
2. Select **Rota Changes**.
3. Select a **Rota date** and select **Rota time between**.
4. Select **Staff member** or leave as **All Staff**.
5. Select either **Search on rota as they are now** or **Search on any past version of the rota**.
6. Click **Run Report** to view the results.

Run Report		View History of Selected Rota													
Audit Constraints															
Rota date		Fri 29 May 2020													
Rota time between		08:00 and 22:00													
Staff member		All Staff													
<input checked="" type="radio"/> Search on rotas as they are now <input type="radio"/> Search on any past version of the rota															
Date	Start	End	Staff	Location	Type	Name	Room	Template	Holiday	Cancelled	Deleted	Created	Created By	Last Amended	Last Ame...
29 May 2020	08:00	09:20	Ross Naylor	NECS GP	Session	Training						27 May 2020 14:52	Mrs Clair...		
29 May 2020	08:00	09:40	Mr Adrian Plank	NECS GP	Session	ap Community Rota					<input checked="" type="checkbox"/>	22 May 2020 10:49	Mr Adrian...	22 May 2020 10:54	Mr Adrian...
29 May 2020	08:00	09:40	Mr Adrian Plank	NECS GP	Session	ap - Community Rota					<input checked="" type="checkbox"/>	22 May 2020 10:54	Mr Adrian...	22 May 2020 12:16	Mr Adrian...
29 May 2020	08:00	10:15	Miss Dawn Purdy	NECS GP	GP	GP Morning session					<input type="checkbox"/>	13 May 2020 08:32	Miss Da...		
29 May 2020	08:00	12:00	Dr Cath Waters	NECS GP	Session	GP Rota am					<input type="checkbox"/>	18 Apr 2020 22:46			
29 May 2020	08:00	12:05	Ridley One	NECS GP	GP Registrar	am Clinic					<input type="checkbox"/>	14 Jan 2020 13:20	Ridley One		
29 May 2020	08:00	12:05	Mr Adrian Plank	NECS GP	GP	GP Morning session					<input checked="" type="checkbox"/>	20 Apr 2020 12:04	Mr Adrian...	21 Apr 2020 11:22	Mr Adrian...

7. Click on a rota and click on **View History of Selected Rota** tab to see the Audit trail for that rota.

Audit – Appointment Calling (if used in the practice)

1. Click **Audit – Appointments** from the menu bar.
2. Select **Appointment Calling**.
3. Select a **Date** to Show display board/reception messages on.
4. Select the **Staff member** to restrict to.
5. Select a **Restrict to site**.
6. Click **Run Report** to view the results.



Ti... v Sending User	Sending PC#	Sent To	Message	User Acknowledged	Acknowledg...
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