



Appointments

Appointments Release 3.1

Version 1.1

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Table of Contents

Appointments Release 3.1	1
Table of Contents	3
Appointments Release 3.1	4
Viewing the Audit History of a Slot	6
Slot Audit History Summary	8
Comparing History Records	8
SMS Messaging	10
SMS Counter	11
SMS History	12

Appointments Release 3.1

Appointments release **3.1** contains the following new features and improvements:

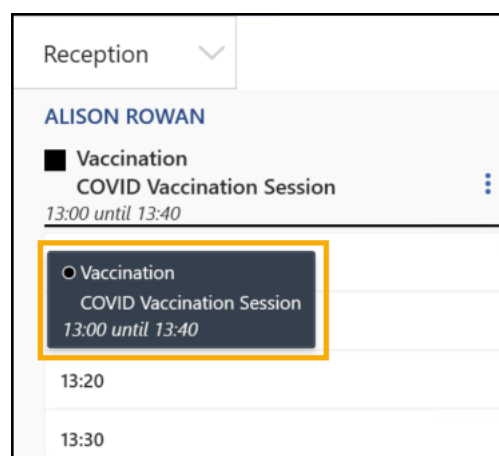
- **Viewing Audit History** - This release introduces the ability to audit slots enabling you to view any changes made, this includes alterations to the slot type, duration or, which patients have been booked in or cancelled. Each change is tracked by date and time and who was logged in when the change was made.

 See [Viewing the Audit History of a Slot on page 6](#) for more information.

- **SMS Messaging** - This release introduces the ability to automatically send SMS (text) messages, from **Appointments**, to patients, keeping them advised of any appointment bookings, updates or cancellations.

 See [SMS Messaging on page 10](#) for more information.

- **Sessions** - Session names can now be a maximum of 30 characters, and you can add a description of up to an additional 500 characters. This additional information displays fully in a tooltip when viewing a session in the **Reception View**:



- **National Slot Categorisation** - In **England** National Slot Categorisation is being introduced by NHS Digital, to align the slot types in **Appointments** with an agreed set of national slot categories. You are required to map all slot types to a national slot category.

 **Important** - Only available to users on release DLM 800 or later.


 See [National Slot Categorisation in Appointments Setup](#) for more information.

Viewing the Audit History of a Slot

You can view the audit history of a slot to see any changes made to it from creation up to but not including, deletion. Auditable updates include:

- Slot Type
- Duration
- Which patients have been booked in or cancelled.

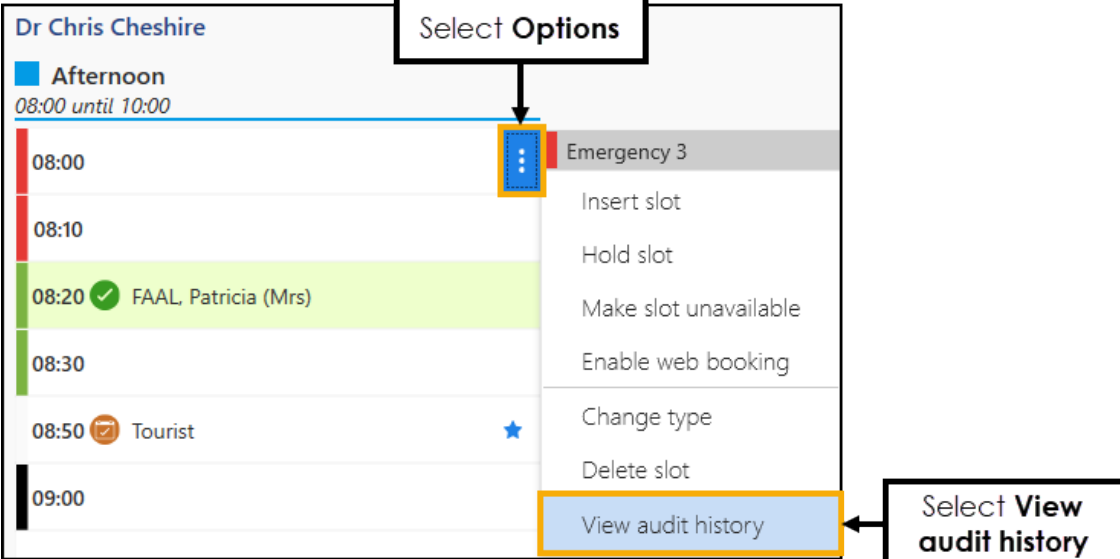
Each change is tracked by date and time and who was logged in when the change was made.

 **Note** – If a slot is deleted its audit trail is not available as it is no longer in **Reception View**.

To view the audit trail:

- **From the Reception and Weekly Views**

From the **Reception** and the **Weekly** views, hover over the right of the patient's name, select **Options**  and then **View audit history**:

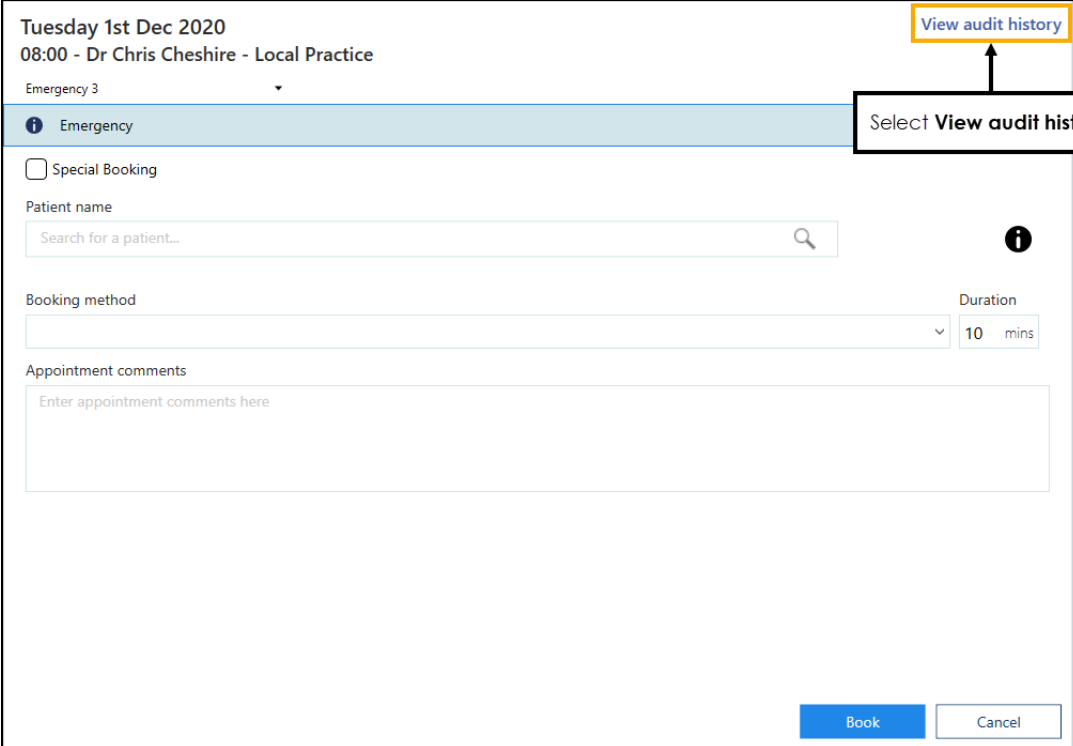


The screenshot shows a slot booking interface for Dr Chris Cheshire, Afternoon (08:00 until 10:00). The interface displays a list of slots with a context menu open over the 08:20 slot. The context menu includes options like 'Emergency 3', 'Insert slot', 'Hold slot', 'Make slot unavailable', 'Enable web booking', 'Change type', 'Delete slot', and 'View audit history'. The 'View audit history' option is highlighted with a blue box and labeled 'Select View audit history'.

The **Slot Audit History** screen displays.

- **From the Booking Form**

From the appointment booking form select **View audit history**:



Tuesday 1st Dec 2020
08:00 - Dr Chris Cheshire - Local Practice
 Emergency 3

Emergency

Special Booking

Patient name


Booking method Duration
10 mins

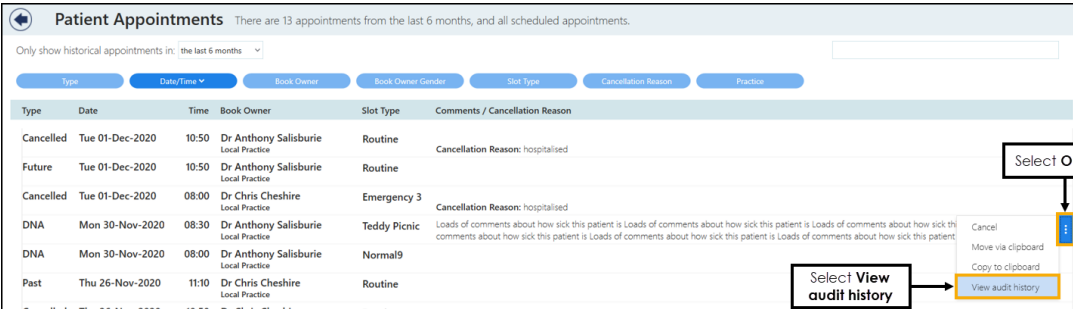
Appointment comments

Book

The **Slot Audit History** screen displays.

- **From Patient Appointments**

From a patient's appointment record, hover over the right of the appointment, select **Options**  and then **View audit history**:



Patient Appointments There are 13 appointments from the last 6 months, and all scheduled appointments.

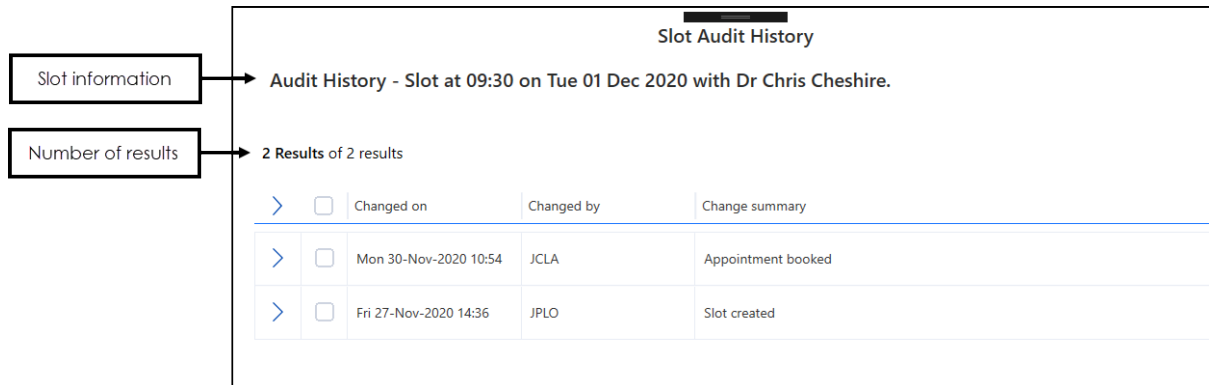
Only show historical appointments in: the last 6 months

Type	Date/Time	Book Owner	Book Owner Gender	Slot Type	Cancellation Reason	Practice
Cancelled	Tue 01-Dec-2020 10:50	Dr Anthony Salisbury Local Practice		Routine	Cancellation Reason: hospitalised	
Future	Tue 01-Dec-2020 10:50	Dr Anthony Salisbury Local Practice		Routine		
Cancelled	Tue 01-Dec-2020 08:00	Dr Chris Cheshire Local Practice		Emergency 3	Cancellation Reason: hospitalised	
DNA	Mon 30-Nov-2020 08:30	Dr Anthony Salisbury Local Practice		Teddy Picnic	Loads of comments about how sick this patient is Loads of comments about how sick this patient is Loads of comments about how sick this patient is Loads of comments about how sick this patient is	
DNA	Mon 30-Nov-2020 08:00	Dr Anthony Salisbury Local Practice		Normal9		
Past	Thu 26-Nov-2020 11:10	Dr Chris Cheshire Local Practice		Routine		
Cancelled	Thu 26-Nov-2020 10:50	Dr Chris Cheshire Local Practice		Routine		

The **Slot Audit History** screen displays.

Slot Audit History Summary

The **Slot Audit History** displays the audit trail of the slot. Every slot has a 'Slot created' history item:

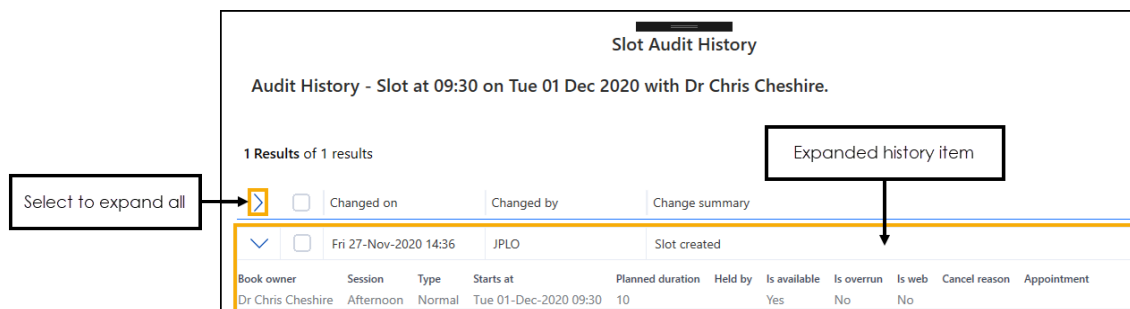


Slot Audit History
Audit History - Slot at 09:30 on Tue 01 Dec 2020 with Dr Chris Cheshire.

2 Results of 2 results

>	<input type="checkbox"/>	Changed on	Changed by	Change summary
>	<input type="checkbox"/>	Mon 30-Nov-2020 10:54	JCLA	Appointment booked
>	<input type="checkbox"/>	Fri 27-Nov-2020 14:36	JPLO	Slot created

- Select **Expand**  on each individual item to display more information, or
- Select the column header  to display all.



Slot Audit History
Audit History - Slot at 09:30 on Tue 01 Dec 2020 with Dr Chris Cheshire.

1 Results of 1 results

<input checked="" type="checkbox"/>	<input type="checkbox"/>	Changed on	Changed by	Change summary
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Fri 27-Nov-2020 14:36	JPLO	Slot created

Book owner	Session	Type	Starts at	Planned duration	Held by	Is available	Is overrun	Is web	Cancel reason	Appointment
Dr Chris Cheshire	Afternoon	Normal	Tue 01-Dec-2020 09:30	10		Yes	No	No		



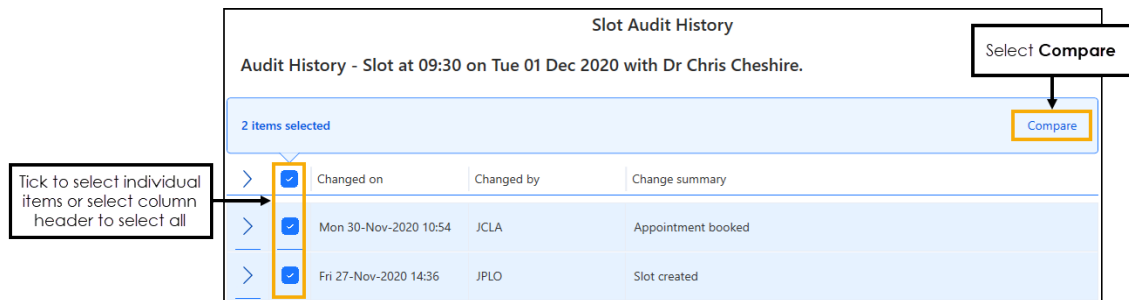
Training Tip - The latest change displays at the top of the list.

Comparing History Records

You can use the **Slot Audit History** screen to compare two of the specific slot updates side by side.

To compare two updates:

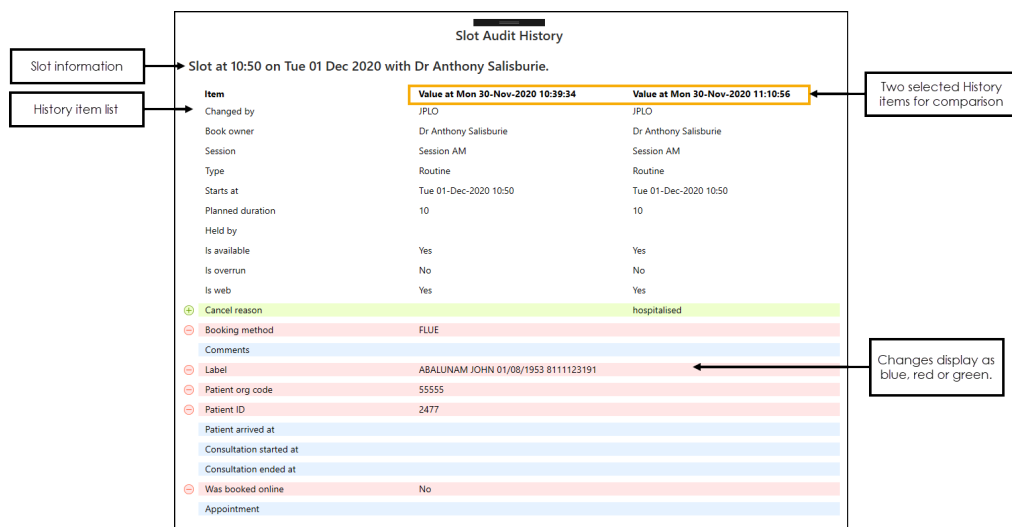
- From the **Slot Audit History** screen, tick the required records and select **Compare**:



The screenshot shows the 'Slot Audit History' screen for a slot at 09:30 on Tue 01 Dec 2020 with Dr Chris Cheshire. A blue bar at the top indicates '2 items selected'. A 'Compare' button is highlighted in the top right. A callout box points to the 'Compare' button with the text 'Select Compare'. Another callout box points to the checkboxes in the table with the text 'Tick to select individual items or select column header to select all'.

Changed on	Changed by	Change summary
Mon 30-Nov-2020 10:54	JCLA	Appointment booked
Fri 27-Nov-2020 14:36	JPLO	Slot created

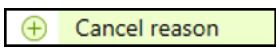

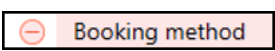
- The **Slot Audit History Comparison** screen displays, showing the two updates side by side:



The screenshot shows the 'Slot Audit History Comparison' screen for a slot at 10:50 on Tue 01 Dec 2020 with Dr Anthony Salisburie. The table compares two history items: 'Value at Mon 30-Nov-2020 10:39:34' and 'Value at Mon 30-Nov-2020 11:10:56'. Callouts identify 'Slot information', 'History item list', and 'Two selected History items for comparison'. A callout also points to the 'Cancel reason' row, stating 'Changes display as blue, red or green.'.

Item	Value at Mon 30-Nov-2020 10:39:34	Value at Mon 30-Nov-2020 11:10:56
Changed by	JPLO	JPLO
Book owner	Dr Anthony Salisburie	Dr Anthony Salisburie
Session	Session AM	Session AM
Type	Routine	Routine
Starts at	Tue 01-Dec-2020 10:50	Tue 01-Dec-2020 10:50
Planned duration	10	10
Held by		
Is available	Yes	Yes
Is overrun	No	No
Is web	Yes	Yes
Cancel reason		hospitalised
Booking method	FLUE	
Comments		
Label	ABALUNAM JOHN 01/08/1953 8111123191	
Patient org code	55555	
Patient ID	2477	
Patient arrived at		
Consultation started at		
Consultation ended at		
Was booked online	No	
Appointment		

- Changes are shown as below:


- New item**  - Displays in green with a +.
- Changed item**  - Displays in blue.
- Removed item**  - Displays in red with a -.

- Select **Back to list**  to return to the **Slot Audit History** screen.

SMS Messaging



The ability to automatically send SMS (text) messages to let patients know that their appointment has been booked, rescheduled or cancelled can help cut down the number of DNAs and mis-communications.

Appointments can be configured to automatically send SMS messages.

 **Important** - SMS messaging must be enabled and set up prior to it being available, please contact your Account Manager for more information.

 **Note** - Once enabled SMS message defaults to **OFF** for every user.

To switch the **SMS Messaging** facility on or off per user select:





-  **On** to **automatically** send SMS messages when an appointment is made or updated in any way.
-  **Off** to prevent SMS messages being sent. Any appointment changes display in **SMS History** as 'Failed'.


The **SMS messages** sent are not configurable, the messages sent are as follows with the appropriate patient and appointment information merged:

Appointment Booked	Appointment Cancellation	Appointment Reschedule in progress
An appointment has been made for you at <u>09:00</u> on Monday 7th December with BABY CLINIC at Test Surgery	Your appointment at <u>10:00</u> on Monday 7th December with BABY CLINIC has been cancelled	Your appointment at <u>09:50</u> on Tuesday 8th December with BABY CLINIC has been cancelled and will be rescheduled. You will receive a notification of the new time and date.

SMS Counter

The **SMS Counter** displays the number of messages that you have sent since the count was last cleared. The colour of the counter indicates the status of the message(s):

-  **Grey** - No messages sent
-  **Green** - All messages were sent successfully.
-  **Yellow** - Some messages were sent successfully, some failed, check the history for details.
-  **Red** - All messages have failed, check the history for details.

 **Important** - The **SMS Counter** clears to zero when you log out of **Appointments**.

SMS History

The **SMS History** screen displays all attempted **SMS Messages**, in time order with latest at the top.

To access the **SMS History** screen:

1. Select the **SMS Counter** .
2. The **SMS History** screen displays:

SMS History		
14:05	Type: Cancellation With Dr Shirley Anderson at 08:00 on 29-Oct-2020 Success: Sent	ALDER, Abby (Ms) NHS: 411 185 9240 Mobile: 07787 111 948
14:05	Type: Cancellation With Dr Shirley Anderson at 08:05 on 29-Oct-2020 Failed: No valid mobile phone number found.	BACKHOUSE, Vincent (Mr) NHS: 411 113 9132 Mobile:
14:05	Type: Cancellation With Dr Shirley Anderson at 08:15 on 29-Oct-2020 Success: Sent	CEDAR, Cillian (Mr) NHS: 411 185 9747 Mobile: 07000 111 111
14:05	Type: Cancellation With Dr Shirley Anderson at 08:25 on 29-Oct-2020 Failed: No valid mobile phone number found.	DACRES, Raymond (Mr) NHS: 411 120 8959 Mobile:
14:05	Type: Cancellation With Dr Shirley Anderson at 08:35 on 29-Oct-2020 Success: Sent	FIR, Flora (Ms) NHS: 411 186 1210 Mobile: 07000 111 111
14:05	Type: Cancellation With Dr Shirley Anderson at 08:45 on 29-Oct-2020 Failed: No valid mobile phone number found.	GAFAN, Munawar (Miss) NHS: 411 123 4658 Mobile:
14:05	Type: Cancellation With Dr Shirley Anderson at 08:55 on 29-Oct-2020 Failed: No valid mobile phone number found.	HEMLOCK, Harriot (Ms) NHS: 411 186 3140 Mobile:

Hide successful requests

[Copy to Clipboard](#)
[Print](#)
[Clear](#)

Each entry displays the message type, message details and patient details.

- **Message Types:**
 - **Booking.**
 - **Reschedule.**
 - **Pending Reschedule** (Appointment has been moved to the clipboard).
 - **Cancellation.**
- **Successful messages** - Display 'Success: Sent'.
- **Failed messages** - Display 'Failed' with the reason why.


 **Note - Special Bookings** are not sent via **SMS message**.

From the **SMS History** screen you can select:

- **Hide successful requests** **Hide successful requests** - Tick to hide successful requests, with successful messages hidden, you can clearly see which messages failed and might need action taken.
- **Copy to Clipboard** **Copy to Clipboard** - To copy to the Windows clipboard and paste into a document to action as required.
- **Print** **Print** - To print the history list.

 **Training Tip** - You can print to a PDF if required.

- **Clear** **Clear** - To clear all history and reset the **SMS Counter** resets to zero.

 **Important** - The **SMS Counter** also clears to zero when you log out of **Appointments**.

 **Important** - **SMS messaging** is available in a Shared Care Setting.
