Appointments

Appointments Release 3.1

Version 1.1

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cegedim Healthcare Solutions

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Appointments Release 3.1

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

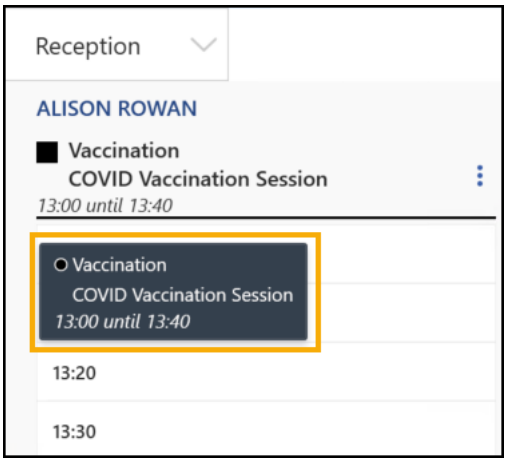
- **Viewing Audit History** - This release introduces the ability to audit slots enabling you to view any changes made, this includes alterations to the slot type, duration or, which patients have been booked in or cancelled. Each change is tracked by date and time and who was logged in when the change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

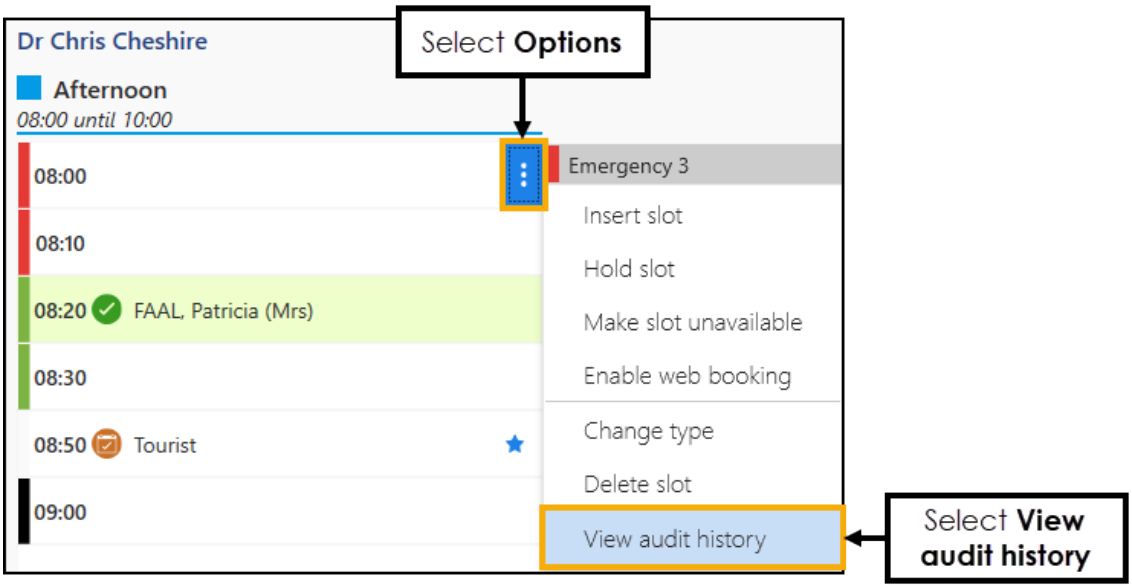
Each change is tracked by date and time and who was logged in when the change was made.

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

To view the audit trail:

- **From the Reception and Weekly Views**

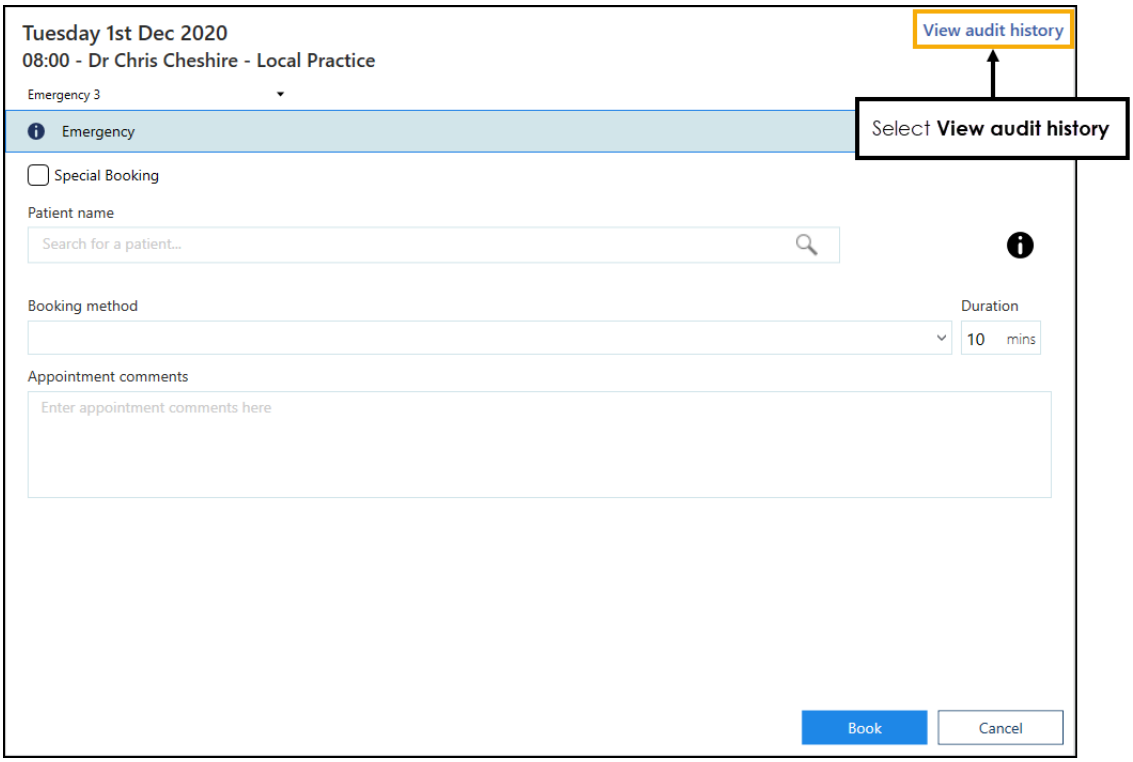
  From the **Reception** and the **Weekly** views, hover over the right of the patient's name, select **Options** and then **View audit history**:



  The **Slot Audit History** screen displays.

- **From the Booking Form**

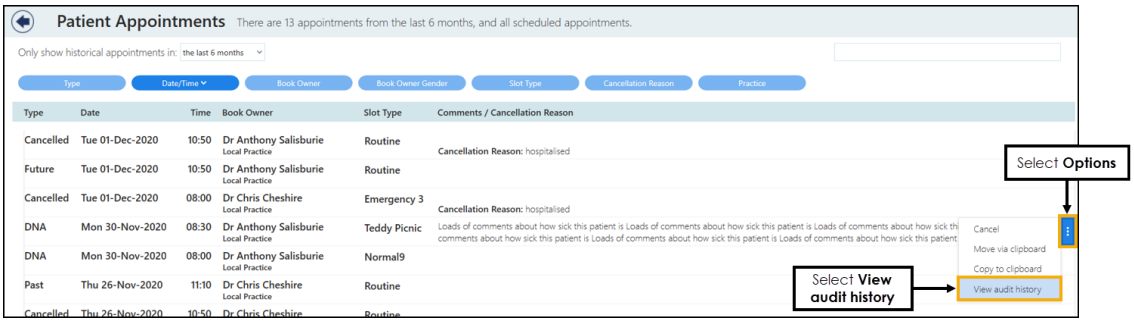
  From the appointment booking form select **View audit history**:



  The **Slot Audit History** screen displays.

- **From Patient Appointments**

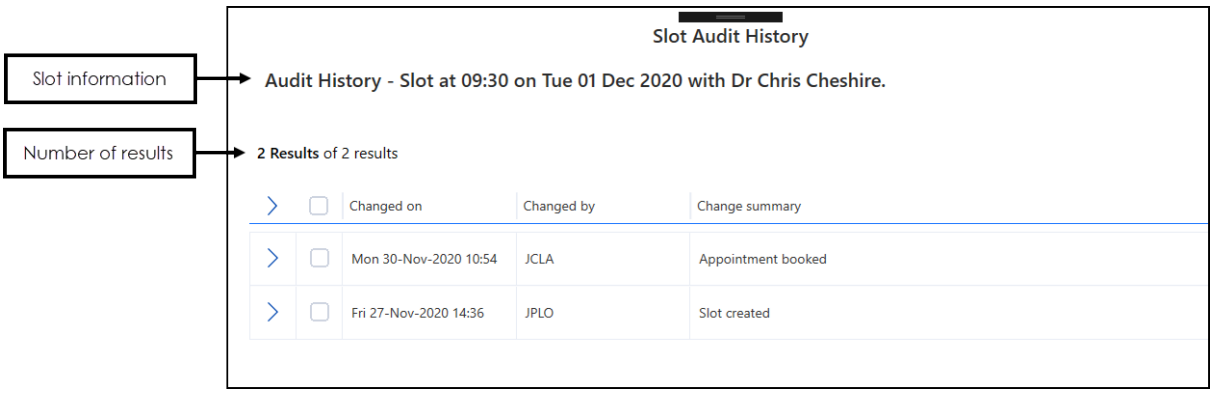
  From a patient's appointment record, hover over the right of the appointment, select **Options** and then **View audit history**:



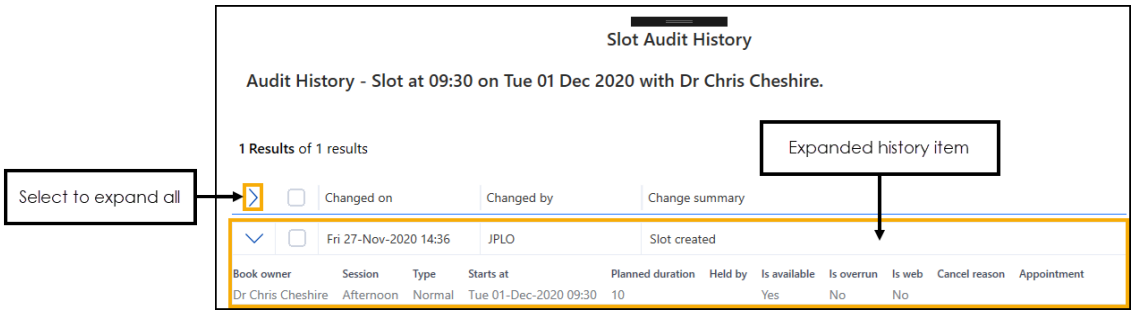
  The **Slot Audit History** screen displays.

Slot Audit History Summary

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



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



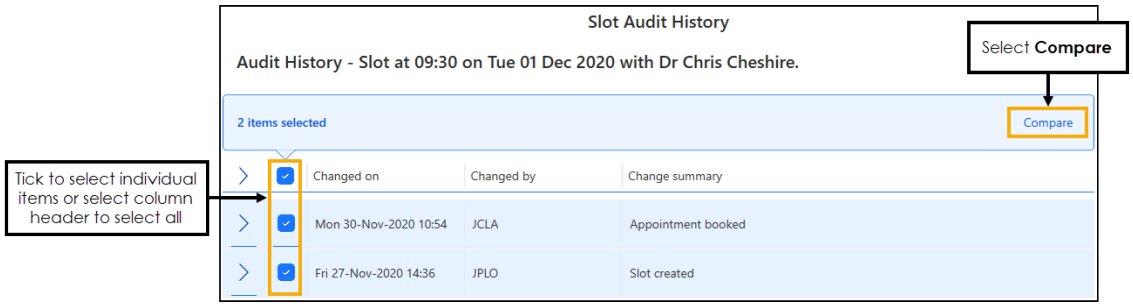
Training Tip - The latest change displays at the top of the list.

Comparing History Records

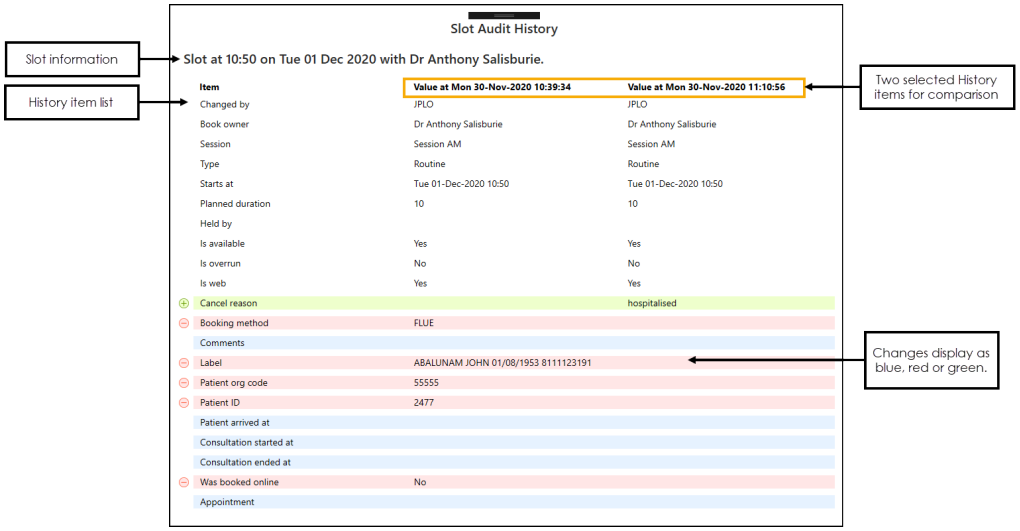
You can use the **Slot Audit History** screen to compare two of the specific slot updates side by side.

To compare two updates:

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



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



3. Changes are shown as below:
   - **New item** ⊕ Cancel reason - Displays in green with a **+**.
   - **Changed item** Comments - Displays in blue.
   - **Removed item** ⊖ Booking method - Displays in red with a **-**.
4. Select **Back to list** 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 09:00 on Monday 7th December with BABY CLINIC at Test Surgery	Your appointment at 10:00 on Monday 7th December with BABY CLINIC has been cancelled	Your appointment at 09:50 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.

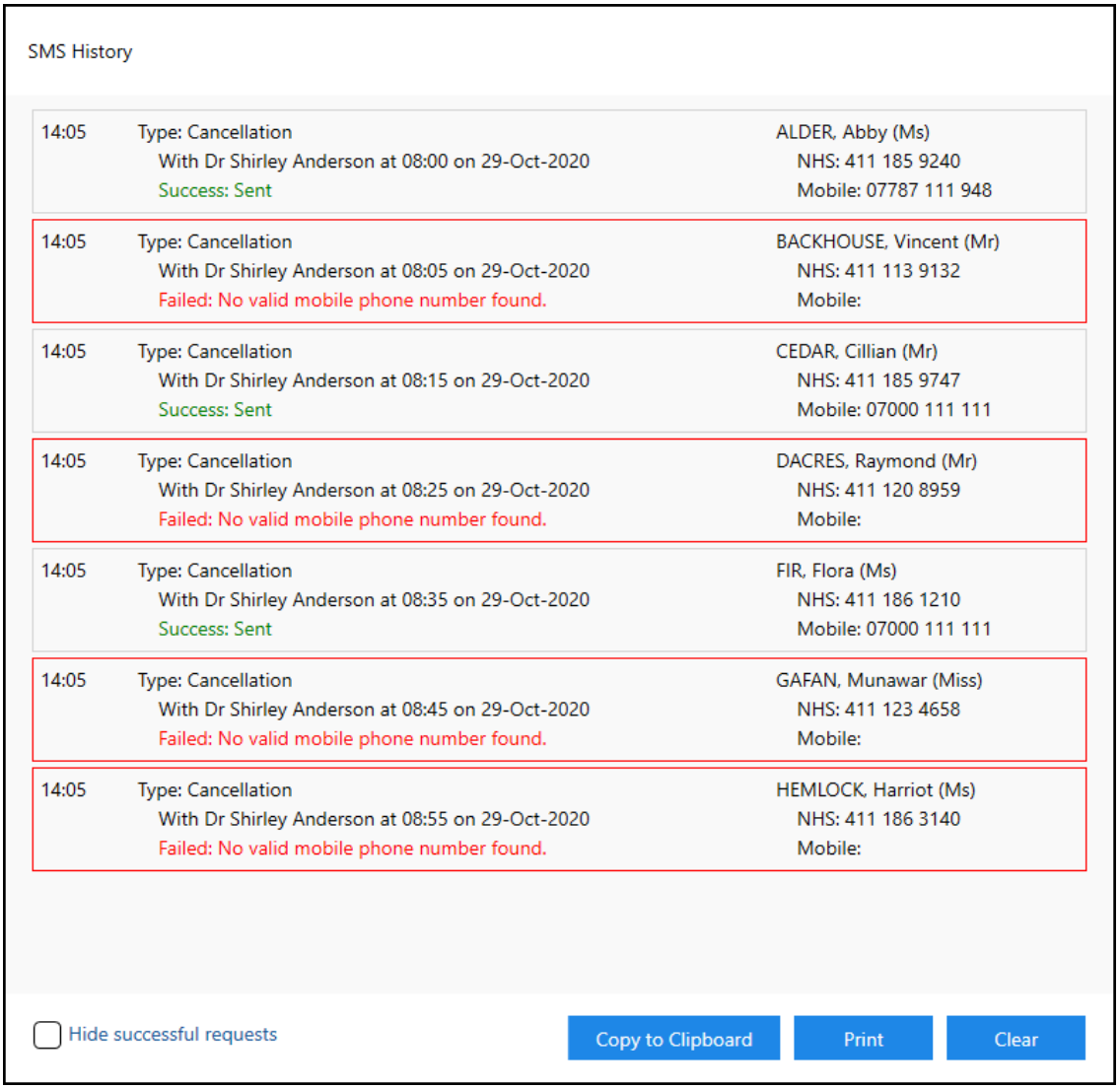
Important - The **SMS Counter** clears to zero when you log out of **Appointments**.

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:



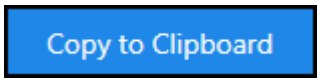
Each entry displays the message type, message details and patient details.

- **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**

- Tick to hide successful requests, with successful messages hidden, you can clearly see which messages failed and might need action taken.
- **Copy to Clipboard** 

- To copy to the Windows clipboard and paste into a document to action as required.
- **Print**

- To print the history list.

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

- **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.