

# National Slot Categorisation Quick Reference Guide

**National Slot Categorisation** is an NHS England requirement aimed at standardising the types of slots used in appointments across all systems in England. The National Categories are issued and maintained centrally, for you to assign to your existing slot types.



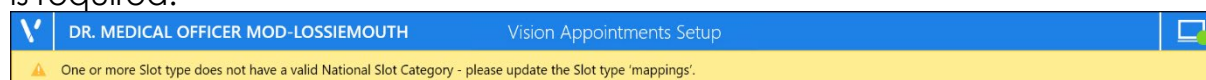
**Note - National Slot Categorisation** is only available if you have upgraded to **Appointments Setup** for the maintenance of your appointment books.

This quick reference guide details initial allocation of slot categorisation, usage and the maintenance requirement.

## What do I need to do?

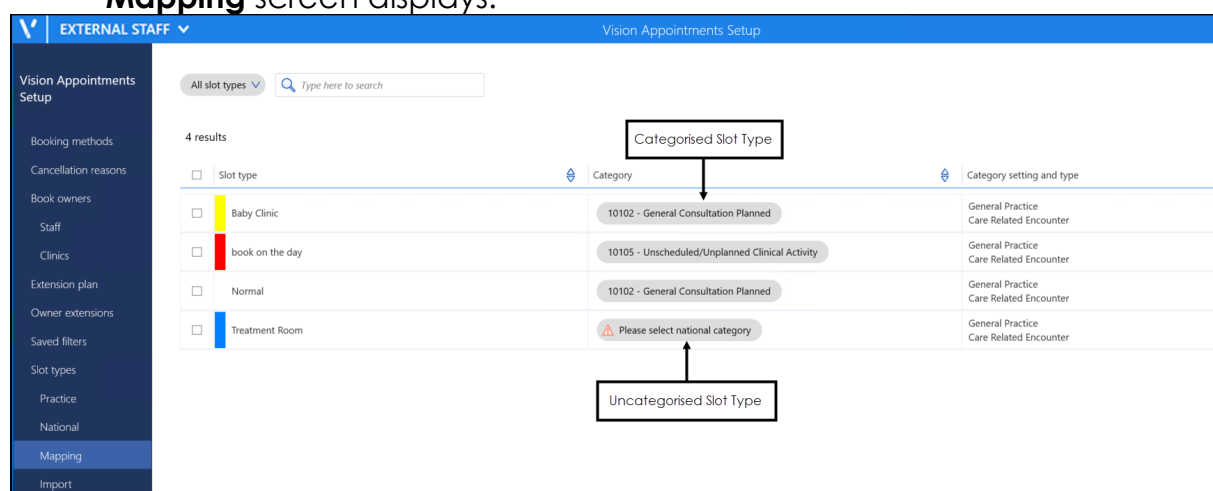
Once you have received **Appointments Setup** release 3.1, as soon as possible you should review your existing **Slot Types** and map them to a **National Slot Category**.

Until you map your **Slot Types** to valid **National Slot Categories** the following message displays "One or more Slot type does not have a valid National Slot Category - Please update the Slot type 'mappings'." when category mapping is required:

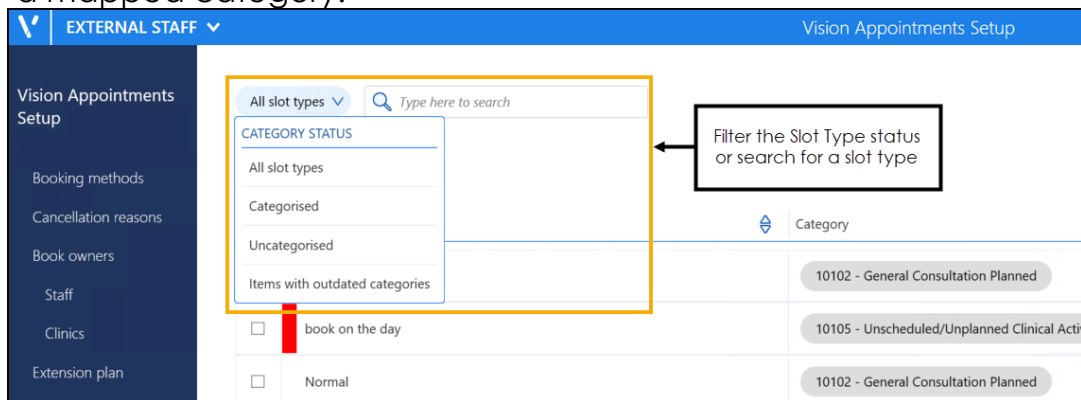


To set a **National Slot Category** for multiple slot types:

1. From the **Appointments Setup** menu, select **Slot Types - Mapping**, the **Mapping** screen displays:

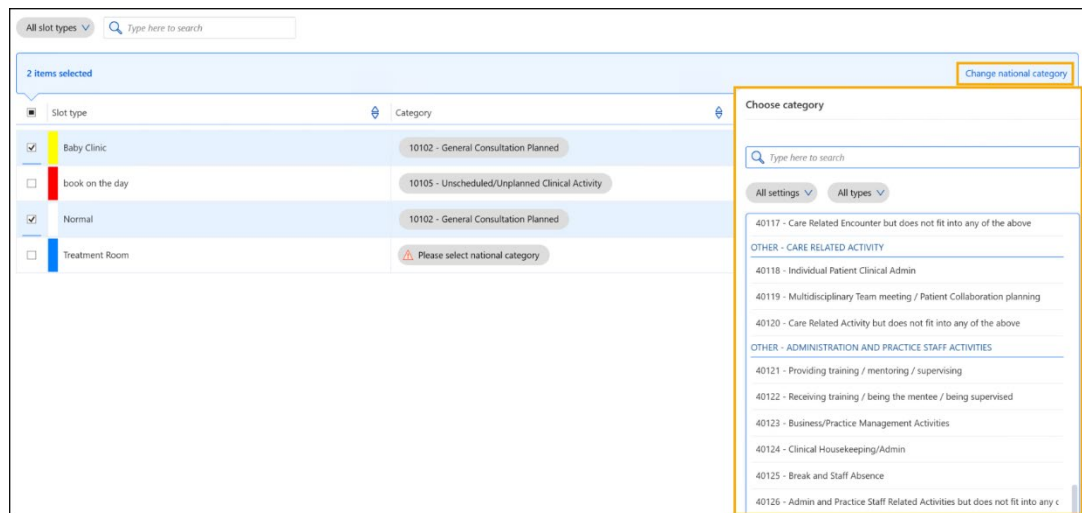


2. Select **Uncategorised** from the filter, to view **Slot Types** that do not have a mapped category:



The screenshot shows the 'Vision Appointments Setup' interface. On the left is a navigation menu with options like 'Booking methods', 'Cancellation reasons', 'Book owners', 'Staff', 'Clinics', and 'Extension plan'. The main area displays a table of slot types. A dropdown menu is open for 'All slot types', showing options: 'All slot types', 'Categorised', 'Uncategorised', and 'Items with outdated categories'. A red vertical bar highlights the 'Uncategorised' option. A callout box with an arrow points to the dropdown menu, containing the text: 'Filter the Slot Type status or search for a slot type'. Below the dropdown, a table shows columns for 'Slot type' and 'Category'. The 'Slot type' column has checkboxes for 'book on the day' and 'Normal'. The 'Category' column shows '10102 - General Consultation Planned' for the 'Normal' slot type.

3. Tick the similar slot types to map them to the same relevant category.
4. Select **Change national category**.
5. A list of the national slot categories displays:



The screenshot shows the 'Change national category' dialog box. The main table has columns for 'Slot type' and 'Category'. Two items are selected: 'Baby Clinic' (category: 10102 - General Consultation Planned) and 'Normal' (category: 10102 - General Consultation Planned). The 'Treatment Room' slot type has a warning icon and the text 'Please select national category'. The 'Change national category' dialog is open, showing a search bar and a list of categories. The categories are grouped into 'OTHER - CARE RELATED ACTIVITY' and 'OTHER - ADMINISTRATION AND PRACTICE STAFF ACTIVITIES'. The 'Change national category' button is highlighted in the top right corner of the dialog.

6. Use the filters to find and select the required category:

Choose category

Type here to search

All settings ▾ All types ▾ ← Filter categories

40117 - Care Related Encounter but does not fit into any of the above

**OTHER - CARE RELATED ACTIVITY**

40118 - Individual Patient Clinical Admin

40119 - Multidisciplinary Team meeting / Patient Collaboration planning

40120 - Care Related Activity but does not fit into any of the above

**OTHER - ADMINISTRATION AND PRACTICE STAFF ACTIVITIES**

40121 - Providing training / mentoring / supervising

40122 - Receiving training / being the mentee / being supervised

40123 - Business/Practice Management Activities

40124 - Clinical Housekeeping/Admin

40125 - Break and Staff Absence

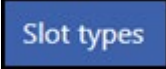

40126 - Admin and Practice Staff Related Activities but does not fit into any c

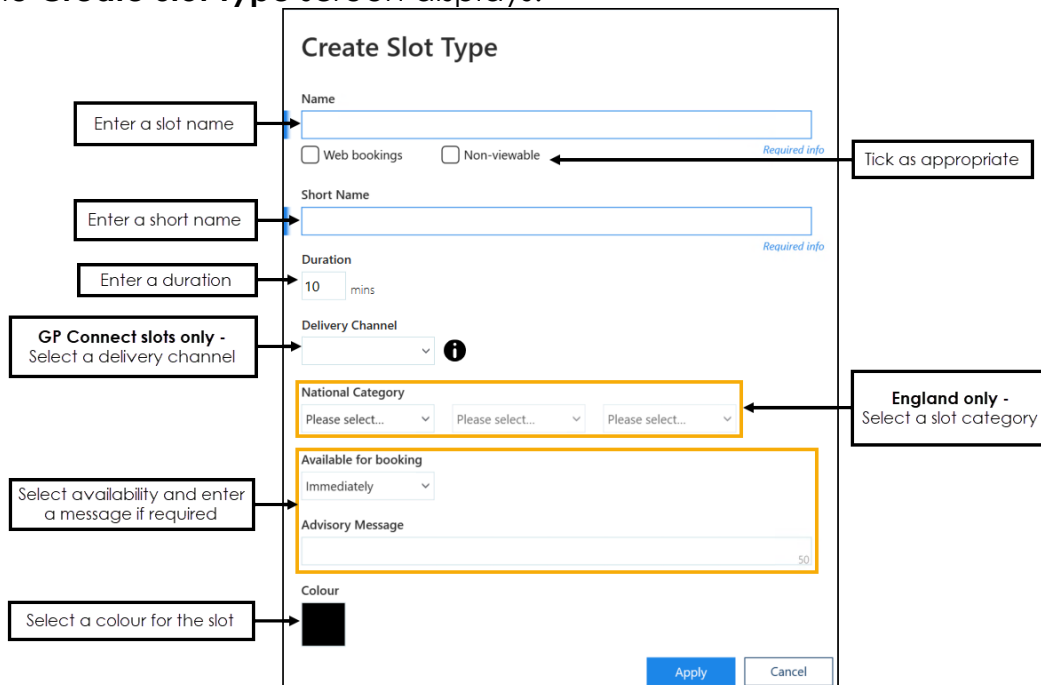
7. Select **Save** to save your changes or **Reset** to cancel any changes:

Save Reset

## Creating New Slot Types

When you create a new **Slot Type** you need to assign it to a **National Slot Category**:

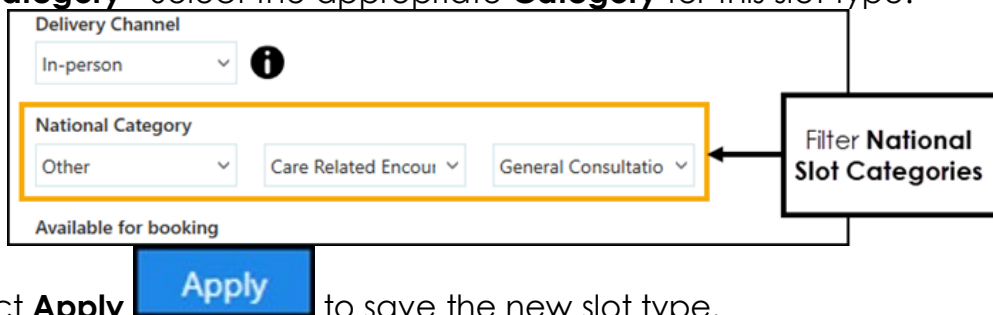
1. From **Appointments Setup**, select **Slot types**  from the **Appointments Setup** menu.
2. The existing slot types display, select **Add slot type** .
3. The **Create Slot Type** screen displays:



The screenshot shows the 'Create Slot Type' form with the following fields and annotations:

- Name:** Text input field. Annotation: "Enter a slot name".
- Short Name:** Text input field. Annotation: "Enter a short name".
- Duration:** Input field showing "10 mins". Annotation: "Enter a duration".
- Delivery Channel:** Dropdown menu. Annotation: "GP Connect slots only - Select a delivery channel".
- National Category:** Three dropdown menus. Annotation: "England only - Select a slot category".
- Available for booking:** Dropdown menu set to "Immediately". Annotation: "Select availability and enter a message if required".
- Advisory Message:** Text area with a 50-character limit.
- Colour:** Color selection box. Annotation: "Select a colour for the slot".
- Web bookings / Non-viewable:** Checkboxes. Annotation: "Tick as appropriate".

4. Fill in the **Create Slot Type** screen as normal.
5. From **National Category** options, select the category that fits the selected **Slot Type** from:
  - **Setting** - Select where appointments, booked with this slot type, should take place.
  - **Type** - Select the type of appointment this slot type is used for.
  - **Category** - Select the appropriate **Category** for this slot type.



This close-up shows the 'National Category' section of the form. The 'Delivery Channel' is set to 'In-person'. The 'National Category' dropdowns are highlighted with a yellow box and labeled 'Filter National Slot Categories'. The 'Available for booking' dropdown is also visible.

6. Select **Apply**  to save the new slot type.

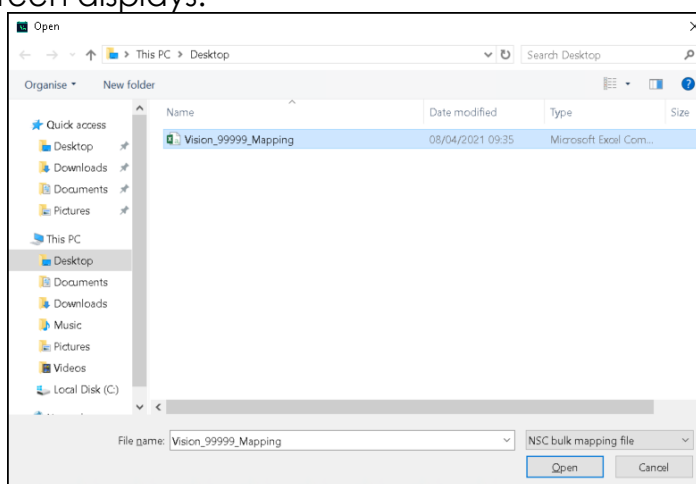
## Receiving and Importing Updates

When **National Slot Categories** are added, updated or inactivated you receive a file to upload, detailing all the changes. This file must be imported using the Slot Types - Import facility.

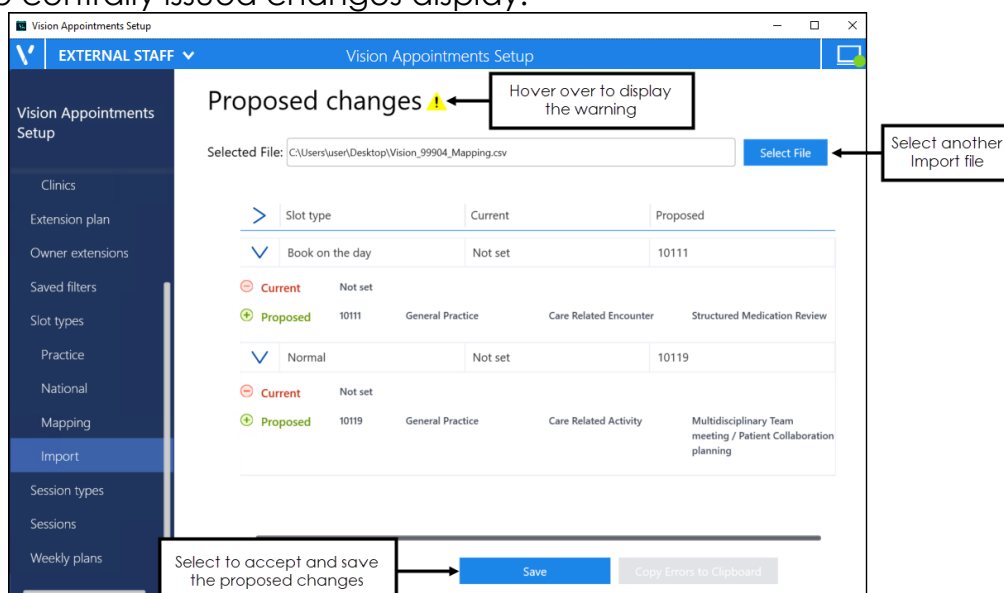
**i Important** - You should review, and if necessary, update items with outdated categories in the **Slot Types - Mapping** screen.

To import and view the proposed changes:

1. Save the file provided to you by the NHS to your computer.
2. Open **Appointments Setup** and log in if required.
3. From the **Appointments Setup menu** select **Slot Types - Import**.
4. The **Open** screen displays:



5. Locate and highlight the file you saved and select **Open**.
6. The centrally issued changes display:



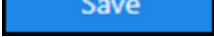

**Proposed changes** ⚠️

Selected File: C:\Users\user\Desktop\Vision\_99904\_Mapping.csv **Select File**

Slot type	Current	Proposed
Book on the day	Not set	10111
<b>Current</b> Not set		
<b>Proposed</b> 10111	General Practice	Care Related Encounter Structured Medication Review
Normal	Not set	10119
<b>Current</b> Not set		
<b>Proposed</b> 10119	General Practice	Care Related Activity Multidisciplinary Team meeting / Patient Collaboration planning

**Select to accept and save the proposed changes** **Save** Copy Errors to Clipboard



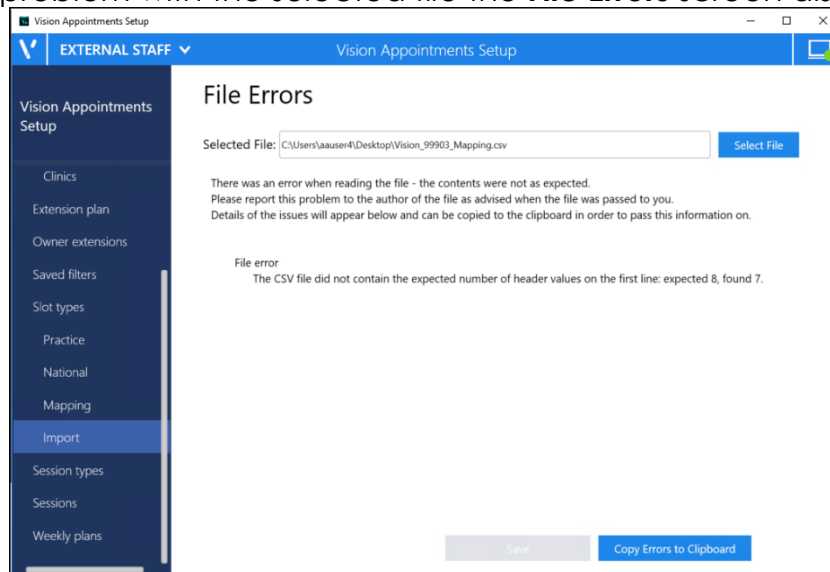
7. Select **Save**  to accept and save the changes.
8. If required, select **Select File**  to find and process another file.
9. You can navigate away from the **Proposed changes** screen without saving the changes if required.
10. Your **National Slot Categorisation** mapping should now be reviewed, see [Slot Types – Mapping](#) to review any additional or outdated categories.





## File Error

If there is a problem with the selected file the **File Errors** screen displays:



Select either:

- **Select File** **Select File** to find and process a different file.
- **Copy Errors to Clipboard** **Copy Errors to Clipboard** to copy to the Windows clipboard and paste into a document to action as required.

