

HOW2 VIDEO TRANSCRIPT

EMIS Web Appointments – Daily Use Guide for Receptionists

This video is aimed at Receptionists using EMIS Web Appointments. The focus is on using the Appointment Book to manage the day's appointments, and this video is accompanied by another one which looks at Finding and Booking Appointments.

It does NOT look at the configuration and management of the Appointment Book which is covered in a separate video.

As a Receptionist your default view of the Appointment Book will be the appointment sessions for that day.

The sessions for each Session Holder on duty will be displayed in separate columns across the screen and you will often need to scroll left to right to view all appointments lists.

The session holders will be displayed according to the Session Holder Filter that you have selected in the bottom left corner. As you can see there is a range of Filters available, which are all created at Organisation Level. To select which Session Filters appear for you, go to 'Appointments Config' on the Ribbon, and then into 'Your Session Holder Filters'. Here you can choose which of the preconfigured Session Holder Filters you want to have available to you. As a receptionist, it's likely that you will need access to most appointment lists.

As we go back to the Appointment Book you can see the two filters that I selected now appear as options in my Session Holder Filters list in the bottom left here.

By default, Session Headers are in blue, like this, but there is an option for Practices to have different coloured Session Header bars for different locations, for example for branch surgeries, so in some practices these may be different colours.

Indeed there are a lot of configuration options for appointments slots too which enable the practice to use coloured backgrounds, coloured text and different icons in the Appointments Book so you will need to become familiar with how these are used at your Practice.

Here are some examples.

You can see in this sample session that the appointment slots are mostly default appointment slots with no extra labels or colours, but with:

- Blocked slots to allow for catching up.
- And with the last 4 slots being marked a 'Telephone consultation' slots, which have a pale yellow background and a telephone icon to the left of them.

In this sample session we have examples of slots reserved for Baby Immunisations, Travel Vaccinations and Diabetes Clinics as well as a block of time marked out for MDT meetings.

Embargoes

Some slots might have an embargo placed on them meaning they can only be booked within a certain time period before the appointment date or time – so you may see text like this in some slots, indicating that an embargo is in place and displaying when that lifts so the slots can be used.

Remote Consultations

Another symbol you may see in the status column is this red arrow – this is used to indicate that the appointment has been booked as a 'Remote Consultation' appointment. This means that it has been booked by another Organisation, for example by another practice, for one of their patients. The slot will behave differently if this is the case, and we cover these slots in a separate video called 'EMIS Remote Consultations – Finding, Booking and Cancelling Appointments'.

Patient facing services

And finally, this 'Patient facing services' icon here is used to mark appointment slots that are available for patients to book online.

When configuring these slot types practices have a wide range of colours and icons to choose from so your Practice slot types could look very different from these.

To view your Practice slot types you can go to 'Appointments Config' in the Ribbon, and select 'Organisation Options' and 'Slot Types' for the full list.

A different list type is also displayed on this page – the Home Visit list.

This list doesn't have times associated with each slot and enables patients to be added to the list in the order in which they are assigned as requiring a Home Visit. This type of list could also be used for open appointment sessions where patients can turn up at any time between the start and finish time of the session. They can be added to this list in the order in which they arrive for that session.

So...as patients are booked into the sessions, we can see that the patient details overwrites the text that was in the slot, but the icon to the left of the slot time remains, so you can still see the type of slot.

If you hover over the patient's name you will see more information about the patient and the booked slot:

- Name and EMIS number
- Calling Name – if they have one recorded
- Date of Birth
- The reason, again
- Details of the slot itself – the type of slot and its time and duration
- And any Booking Notes

Now let's take a look at how you can configure some of the elements of the Appointment Book, by revisiting the Appointment Config option in the Ribbon.

- a. Have the patient's EMIS number displayed next to their name on the appointment list
- b. Show an alert symbol if a patient has not arrived by the time their appointment is due.
- c. Configure the display of the different slot colours to either colour the whole row apart from the Status and Time sections – which is how we have it set at the moment, or change to having only the status and time sections displaying the colour. I'll change to that option so we can see how that looks.
- d. We can see that my user options already show the waiting time for patients – remember that the waiting time here is calculated from the time that the patient arrived, no matter how early they were, NOT from the time that their appointment is booked for.
- e. Displaying the 'Patient Facing Services' icon lets you know which appointments were booked by the patients themselves online.
- f. **And lastly in this section, you can opt to display the patient's calling name in the appointment slot instead of their 'First Name' as shown in Registration.**

So – if we leave Appointment Config for now and return to our session we can see that:

- the colour markings have now changed as we selected, and only the Time and Status sections are coloured.
- There is now a red alert icon indicating patients who have yet to arrive but the start time of their appointment has passed
- And the Calling Name is now displayed.

If you right-click on an Appointment Slot you can view, amongst some other options that we will return to:

Slot Properties – which gives you two tabs with information about the slot itself, and the booking of that slot. So we can see here, for example, who booked the slot and when.

And **Slot History** which gives you a full breakdown of every action that has been performed on that slot going right back to the creation of the slot, including any changes to the slot's properties and details of when it was booked for example. This would also include information about cancellation for example.

So what happens when a patient arrives for their appointment?

Let's move to an Appointment Book with some patients booked in.

If you have Patient Arrival technology at your Practice the patient may 'arrive' themselves, or they may still come to reception.

To manually record that the patient has arrived, you highlight their appointment slot and either press 'A' on the keyboard, or right-click on the slot, select 'Change Slot Status' and then select 'A' for Arrived.

These options place an 'A' next to the patient's name on the Appointment List, and the Session Holder can now see on their screen in the Consulting Room that the patient has arrived.

The waiting time clock starts when the patient is arrived.

Send In or Start Call

When the Session Holder is ready to see the patient, they will select 'S' for 'Send In' [or you can right-click on the slot and select 'Change Slot Status' and then select 'Send In'.] This places an 'S' in the status column.

Patient Leaves

When the patient leaves the Consultation the Session Holder will record that by selecting 'L' for 'Left'.

On Reception you will be able to see these statuses changing, and could use these statuses to know whether a Session Holder has a patient in with them at the time, for example, their last patient has left, but their next one has not arrived, or has not been 'Sent In'.

As patients are marked as 'Left' their names are crossed off the list.

DNAs

If a patient does not attend for their appointment then they can be marked as having DNA'd manually, using the right-click 'Change Slot Status' option, but many practice will have configured their Appointments Book to automatically DNA patients after a certain time period has passed since their appointment was due to start. So you will notice the letter 'D' appearing in the status column for these patients.

Walked Out

The last option to mention in the 'Status' column is the letter 'W', which you will need to use to indicate that a patient 'Walked Out' having previously been marked as 'Arrived', but NOT having been called in to see the Session Holder yet.

Any slot status can be cancelled by highlighting the slot and typing 'C', or by right-clicking on the slot and opting to 'Cancel slot status' under the 'Change Slot Status' option.

If you need to inform the Session Holder of anything either relating to a patient, or not, you can use 'Comments'.

These show as pale yellow bars immediately below the slot to which they were added.

You add a Comment by right-clicking the slot and choosing 'Add comment after this slot'.

These comments can be edited or deleted on right-click.

Before we finish, let's run through some of the other features that you will come across during normal day-to-day usage as a Receptionist.

In Appointments Config, you can see that there are options to define when you want your 'Afternoon' to start, and also to give a time limit in minutes for when you want morning sessions to close down. I'll leave these as 1pm and zero minutes, and if we go back to the appointment book we can see these settings demonstrated here where the morning appointment sessions have closed and are now just represented with the blue header.

If I want to view those appointments, I still can – I just need to open them by clicking on the double-arrow icon to the right on the header.

Likewise, I can close any sessions I don't want by clicking on that icon on an open session.

Force Reason to be entered when booking or cancelling appointments

It is also possible for you force a Reason to be entered whenever you book an appointment, and also whenever you Cancel an appointment.

Back to the Ribbon options and you can select to look only at morning or afternoon, with 'All Day' being the default.

Privacy

The 'Privacy' option removes patient identifiable information from the screen, replacing it with EMIS number, and should be used whenever there is a chance that a patient or anyone else present who should not be viewing patient information might see the screen.

Confidentiality Policies

Also relating to patient privacy: If you are required, for any reason, to access the patient's record from their Appointment Slot, you may find that some patients have Confidentiality Policies applied to their records, and this means that when you try to access their records you may be presented with a Consent Box to confirm that you have consent to access those patients' records. Responses to these consent questions are recorded and added to the Audit Trail, so be sure you have the patient's consent to access their records before you confirm this.

If in doubt about accessing records protected by Confidentiality Policies, check with your Practice Manager for local protocols.

Refresh

Incidentally, if you find that appointment information is not being updated on your screen quickly enough, for example changes made by Session Holders are not reflected yet on your screen in the Reception area, use the 'Refresh' button here.

Changing Slot Properties

You may be asked to change the properties of an Appointment Slot during a Session, for example, if a Session Holder asks for their usual 'Break' slot to be moved to a later time, or if you wish to Block out a slot.

To do this, right-click on the slot in question and select Slot Properties.

You can then select a different option from the Slot Type drop down list, or tick 'Blocked'. Blocked slots cannot be booked into by anyone, whereas other slot types can be overwritten if a slot is urgently required.

Patient Appointments

If a patient needs to check the date of their appointment, you can use the 'Patient Appointments' option in the Ribbon. Identify the patient in the Patient Find dialog and you will be presented with a list of all that patient's future, past and cancelled appointments.

Search

You can also use the 'Search Book' option in the Ribbon to quickly find a patient by name – particularly useful if you have a large, busy appointment book.

Print the Appointment Book

If your role includes printing out Appointment lists for business continuity or for visits for example, there are two useful options.

You can use the 'Print' option on the Ribbon which will give you the options to:

- Select a date or date range, and times – so the Print option is not just limited to Today's Appointments
- Specify which Session Holders to include – this defaults to all but you can select individual Session Holders using the Spy Glass
- Include Patient details on the list
Note that you can define at User level what patient information should be included in these Printouts. To do this, go into Appointments Config and at the bottom of the User Options, General section you can select which data elements to include.
- Print Assigned lists – which relates to a separate function called 'Scheduled Appointments' which we are not covering in this video.

Or, to print out an individual Session list you can right-click on the Session Header and choose 'Print Session', which gives you the option to include Patient Details or not.

The printout is a simple table which includes the slot time, patient's name, Reason and any Booking Notes. If you opt to include Patient details you will get the date of birth and contact numbers for the patient as well for each patient.

Finally, if you need to Cancel a session, you have various options to choose from.

Right-clicking on the Session header gives you the option to 'Cancel or Reassign'.

As there are patients booked into the session this dialog box appears displaying the booked patients and giving you these options:

- Assign another session holder for the session – which you can use if the session has not already gone past its start time.
- Cancel the session and moved the booked patients to the reallocation list
- Or
- Cancel the session and cancel the booked appointments

Opting to move the patients to a reallocation list creates a special list of these patients which can then be viewed by selecting the 'Reallocation List' option from the Ribbon. Here you will see all the patients who were on the cancelled session list. You'll notice that that cancelled session has disappeared from the appointment book now.

You can view information about the original appointment and the activity for the reallocation slot by right-clicking and viewing Slot Properties and Slot History.

And it's possible to remove the patient from the slot without booking them a new appointment by selecting 'Delete' from this menu.

To reallocate the patient from this list to a new appointment slot, right-click and select 'Cut'.

Then find the appointment you want to book them into – on this page or any other appointment page, and right-click on that slot and select either 'Paste' or 'Paste and Print'. You would use 'Paste and Print' if you want to print a standard appointment slip or letter at the time.

It does sometimes take a while for the patient's name to appear in the new slot so you may need to be patient here.

That patient has now been removed from the Reallocation list.

Returning to the options for Cancellation and Reallocation, you can see that there is also an option to print letters for all patients here, for example if you are cancelling all the appointments and wish to send a letter out to all patients.

Below this, there is a notifications box which is ticked by default if one or more of the patients on the list have opted for SMS appointment notifications (as recorded in their Patient Registration Details).

You can view the default cancellation message here, and edit it if you wish before sending it to all patients with SMS notifications turned on. You will need to remember to check that patients without SMS notifications are sent a letter.