

## HOW2 VIDEO TRANSCRIPT

### EMIS Web Appointment – Day to Day Usage for Session Holders

This video is aimed at Appointment Session Holders and describes the EMIS Web appointment book and how to use it on a day-to-day basis in your Consulting Room.

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

If you wish to look at your appointments on other days, you can use the calendar to navigate, or if you wish to see appointments for other clinicians or groups you can use any of the available filters to the left, or use the 'Quick Pick' filter to select a one-off filter.

'Quick Pick' takes you to the 'Find Session Holder' dialog box where you can select one or more session holders, or use the 'Locations' tab to select a location, or the 'Lists' tab to filter on Appointment List types.

There's also an option at the top to filter on 'Session Categories'.

Every practice uses Appointments differently, so what's available to you here will vary greatly. You need to become familiar with how, or if, your practice uses Locations, List types and Session Categories, in order to get the most out of this 'Quick Pick' filter.

Location and Session Holder filters will have been created at Organisation level and you can select which Session Holders appear for you by accessing 'Appointments Config' on the Ribbon, and going into 'Your Session Holder Filters'. Here you can choose which of the preconfigured Session Holder Filters you want to have available to you.

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 on the bottom left.

Although you can filter in other session holders, in general you may want to stick with just displaying your own appointments list for the day and the extra space freed up on the screen is automatically used to display the information that's most useful to you for each appointment slot.

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, some practices might use that for branch surgeries.

Indeed there are a lot of configuration options for appointment 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 at the end of each hour 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 and 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 'Finding, booking and cancelling appointments'.

### **Patient facing services**

And finally, this 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.

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 it is.

The information that is shown for each patient booked into a slot will also depend to a certain extent on how you configure your User Options for Appointments.

You can see here that we've got Reason and Booking Notes displayed for these appointments.

The Reason can be added by the appointment booker either in free text or from a picking list of common reasons that the practice might have created.

Booking Notes are any other free text notes that are added to the appointment at the time of booking, or at a later point.

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 that we've just looked at.

If we access Appointments Config, we can see that there is a section for User Options. We'll return to this section a few times during this video but for now we'll just be looking at this section: Your Slot Settings.

At the top of this section you have the option to configure which columns are displayed in your appointment sessions. We have seen that Reason and Booking Notes are displayed already, but there are other columns that you could choose to display as shown on the left – to select or deselect, just click on the item and use the green arrows in the middle to move from the Available to Included, or vice versa.

‘Slot notes’ are notes that relate to the slot itself, NOT to the patient, so are different from Booking Notes which relate to the patient. If you add Slot Notes to a slot, these will remain with that slot regardless of which patient is booked into it, whereas Booking Notes follow the patient.

‘Clinician’ is useful for Lists and Joint Sessions where multiple clinicians will be working with the patients on the appointment list.

‘Last Appointment’ might be useful for Long Term Condition Annual Review clinics for example.

And ‘Date of Birth’ might be useful for Vaccination clinics.

Remember that whatever you select here will remain as that configuration for all your appointment sessions, but you can come into Appointments Config at any time and switch them on and off – so if you would like Date Of Birth showing for one clinic only, you can configure it at the beginning of the clinic and then switch it back again at the end.

Other options in this section allow you to:

- 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.
- 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 for each slot 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.

### **View Medical Record**

You can view a patient’s Medical Record from their appointment slot.

If you right-click on the slot, and select M – you’ll be taken to that patient’s Care Record Summary page where you can browse their records.

To return to the Appointments Book, you can use the Quick Access Toolbar ‘Previous Page’, or ‘Appointment Book’ icons for example.

Notice that while you're in a Care Record you can also use tune function key F10 which will firstly bring up a quick view of your appointment session with some of the basic user options available, and then select 'Appointment Book' to go back to the full appointment book.

That's useful to keep an eye on the situation with your daily appointments whilst elsewhere in the system, for example if you have some spare moments when waiting for your next patient to arrive and decide to check some items in Work Flow Manager.

Other useful options on right-click are:

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.

You can also view the 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.

### **So what happens when a patient arrives for their appointment?**

If you have Patient Arrival technology at your Practice the patient will 'arrive' themselves, or the team on reception will mark them as arrived. This places an 'A' next to their name on the Appointment List.

### **Send In or Start Call**

When you are ready to see the patient, highlight the slot and type 'S'. Or you can right-click on the slot and select 'Change Slot Status' and then select 'Send In'.

Now depending on whether you have Patient Call technology in place in your Practice, the patient may be called in from the Waiting Room by announcement boards or screens there. It might be that you need to, or choose to, call the patient in person.

Having selected 'S' to Send In, if you have configured your system to do so, a Consultation will be launched automatically.

To configure this to happen, go into Appointments Config on the Ribbon, and in User Options scroll down to the 'New Consultation' section. Ensure that next to the entry that reads 'On a registered patient send in' the option 'Start new Consultation' is displayed. You can select this by just clicking on the option in blue here to toggle between settings.

This will now launch a new Consultation whenever you select 'S' to 'Send in' or, for telephone consultations, 'S' to 'Start call'.

You then use the Consultation Mode to record the details of that contact, and once you file the consultation you'll be returned to the Appointment Book.

Anyone looking at the Appointment page will be able to see the status for each appointment change, so Reception, for example, will be able to see when you're busy with a patient, or when a patient has left.

### **Telephone Consultations**

For Telephone consultation slot types the options are different. For these you have the option to 'Start the call' or to mark the slot as 'Telephoned but no answer'.

If you 'Start' the call, and you have configured your system to do this, as described earlier, a Consultation will be launched automatically for you to record the contact with the patient.

Once you have 'Started' the call, the options change to let you either cancel the status if you marked it incorrectly, or to 'Complete' the telephone conversation.

As patients are marked as 'Left' their names are crossed off the list, but their Care Record is still accessible through the slot.

### **Quiet Send In**

There is also an option to perform a 'Quiet Send In'.

This would be used if you feel it inappropriate for the patient's name details to be broadcast on the Patient Call screens in the waiting rooms.

Selecting 'Q' to send the patient in instead of 'S' will achieve this, and you can bring the patient in in whatever alternative fashion you choose.

### **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 will be used to indicate that a patient 'Walked Out' having previously been marked as 'Arrived'.

### **Slot Comments**

As well as the status notifications, look out for Comments that are added to appointment slots, which show as pale yellow bars immediately below the slot. These might be messages from the reception desk to you about that patient for example.

It's also possible to add your own comments to slots, which you do by right-clicking the slot and choosing 'Add comment after this slot'.

These comments can be edited or deleted on right-click too. Once you've added a Comment, everybody else looking at the Appointment Page will be able to see it.

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

Looking at some of the Ribbon options, we have:

- a) Different ways to view your appointment book.
  - a. The default option at present for me is set on 'Day View'. If I select 'Week View' here I'll be able to see an overview of all appointment sessions for the week.
  - b. I can choose 'Week View' as my default view by going into Appointments Config and selecting 'Week' next to 'Initial view when you enter Appointments'
- b) While we're 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 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. 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.

### **AM/PM/All Day views**

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 the patient or anyone else present might see the screen.

### **Confidentiality Policies**

Relating to patient privacy you may also find that some patients have Confidentiality Policies applied to their records, and this means that when you try to access their records through the appointment slot, 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.

### **Refresh**

The 'Refresh' option will refresh the screen to make sure that Comments, Externally Booked appointments, etc are up to date. It's a useful habit to get into: clicking on 'Refresh' regularly – as there are various circumstances, mainly relating to local network issues, where the appointment list isn't updated regularly or it takes a while to be refreshed. This manual refresh will check for updates and refresh the screen appropriately.

It's sensible to always do a refresh at the end of your session to check that all appointments have been actioned and nothing's been missed. Also, make sure you use it regularly if you're consulting from home, for example.

### **Change Slot Properties**

If you wish to change the properties of a slot type during a Session, for example to add a 'Break' slot or Block a slot, you can edit the Slot Properties.

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'. Note that blocked slots cannot be booked into by anyone, whereas other slot types can be overwritten if a slot is urgently required.

### **F10**

One very useful function, if you've navigated away from the Appointment Book for any reason, is the F10 Function key, which will firstly bring up a quick view of your appointment session with some of the basic user functions available, and also let you select 'Appointment Book' to take you back to the full Appointment Book. That's really useful to keep an eye on the situation with your daily appointments whilst elsewhere in the system, so, for example, if you've got some spare moments while waiting for your next patient to arrive, and you decide to check some items in Work Flow Manager.

### **Display Appointments on the Home Page**

Finally, a reminder that it is possible to display your Appointments session for the day on your EMIS Home Page.

To do this, go to the Home Page and select 'Configure Home Page' here.

Select 'Show Appointments on homepage' and pick yourself as the Session Holder.

Your days appointments are then displayed on the left and you can use most of the key functionality required for day-to-day usage of the Appointments book as a Session Holder, for example seeing the patient and slot information and properties, seeing the slot status – who's arrived, DNA'd, etc.

You can use 'S' to 'Send In' or 'Start Call' and you can Refresh the list to ensure it's up to date.

The Appointments Config options are not available here – you would need to access the full Appointments Module for those.

That completes our round up of the key features of the Appointments module if you're using it as a Session Holder on a day-to-day basis.