HOW2 VIDEO TRANSCRIPT

Finding and Booking Appointments on EMIS Web

This video focusses on finding and booking appointments at your own practice.

A separate video called 'EMIS Web Remote Consultations – Finding, booking and cancelling appointments', looks at booking cross-organisation appointments, although the basics for booking appointments described here are the same for both these methods.

Appointment book calendar

To look for appointments in EMIS Web you can simply browse through the appointment lists using the calendar.

Remember that the **'Today'** option here will always return you to today's date.

You can scroll across to look at the different sessions available and up and down to view the available times.

Day vs Week View

You can change between Day View, as displayed here, to 'Week View' which gives an overview of all appointment sessions that week so you can see availability. Hovering over a session with available slots gives you more information and you can then drill down into the actual session with a double-click.

AM/PM filter

There are also options in the ribbon to filter the view by AM or PM only

Locations filter

And the locations filter could be used to specify locations such as branch surgeries.

Find Slot

Alternatively you can use the 'Find Slot' function to search for appointments using specific criteria.

For example, our patient, Ann, needs an appointment with a NURSE next week.

It's ideal if you find your patient first, so they're your active patient, then click on Find Slot in the Ribbon.

Depending on whether you have the ability to book your patients into other practices or services, for example for Extended Access, or into a PCN-level team like Social Prescribing or Clinical Pharmacists, you will have the option here to 'Find slot' or 'Find cross-organisation slot'. The system I'm using here doesn't have GP Connect active, but on some systems you'll also have a 'Find GP Connect Appointments' option like this.

To understand the use of the 'Find cross-organisation slot' option, see the video 'EMIS Web Remote Consultations – Finding, booking and cancelling appointments'.

To look for a slot only at your own practice, select 'Find slot' from this list.

The 'Find appointments' dialog box is displayed and you can begin to filter the list displayed in the bottom section by changing the criteria in the top section.

The information displayed here gives you the Date and Time of each appointment, along with its duration.

If icons are used to identify your practice's appointment slot types, these will also be displayed.

The name of the Session holder is shown here and the Slot Type and Session Name can both help you narrow down suitable appointments.

Finally the location is shown on the right.

Select Starting Date for appointment search

We're looking for an appointment for next week for Ann, so I'll select Monday's date to start searching from.

Note here that you can also use the standard EMIS shortcuts for going to dates by typing in, for example, +2w for 2 weeks from now. Or minus 2d to go back 2 days.

You can see as you do this, the list at the bottom is adjusting to display appointments according to the amended criteria.

It's not mandatory to use these filters at the top, and as soon as you can see the appropriate information you can offer that appointment to the patient, but you may need to add further filters at the top, for example:

Include/exclude Urgent appointments

Exclude urgent appointments…

…or look for Urgent only.

Specify time of day for appointment search

Select a specific time of day if the patient has expressed a preference, for example 'afternoons'.

Notice here you can also choose 'Any time before', 'Any time after' or 'Between' two times and enter the appropriate times.

Filter on Slot Type

Use the 'Slot Type' field to filter further on slot types, so I'll select 'Treatment Room'.

Filter on Session Holders

On the right you can select either to filter on a specific session holder, or group of session holders – the default here is to include all, but you can browse through your sessions holders using the spyglass.

Alternatively, apply a Filter, and select from the Session Holders on your personal Session Holder Filter List.

Filter on Languages spoken by session holders

Other filter options include being able to filter on Languages – this relates to the languages assigned to each of your session holders, which are configured in User Management. This may or may not be used in your practice.

Clear appointment search criteria

Remember that at any time you can clear all the filters you've just applied by selecting 'Clear Appointment Criteria' at the bottom here.

There are also some 'Advanced Criteria'.

Advanced Criteria

Exclude selected days of the week

Here you can select days to exclude, for example if the patient can't attend on Mondays and Thursdays.

Specify a minimum slot time if you know the appointment will require this.

Search for Consecutive slots if you need to book more than one slot for a longer appointment.

Filter on Session Category with this drop down list

And **specify the gender of the session holder** if the patient has expressed a preference.

Let's clear our criteria and go back to a simple search for appointments next week………………………….

And select 'Treatment Room' as the Slot Type.

Notice also at the bottom of the list, there are options to look for **Later or Earlier appointments** which let you browse more easily through what's available.

Your practice might use your appointment system differently from this, so your preference might be to search for individual users, or use the filters. You'll need to experiment as you get to know how your practice works.

We can see a set of Treatment Room appointments here for next week, so from this list you're able to offer the patient a choice.

Select the desired appointment and click on '**Book appointment'**.

This brings up the 'Book Slot' dialog box, into which you will need to add further information about the booked appointment. Each practice may have different requirements for what must be completed in this box.

Before we look at the data fields, you can see that the patient name is displayed and the details of the appointment are shown across the top.

At the bottom of this dialog box you can see the patient's past appointments which will include a list of any DNAs. Your practice may have a policy of mentioning DNAs at this point if it's clear that the patient regularly misses appointments.

You have the option to **record a Reason for the appointment**. This can be selected from a drop down list of pre-configured Reasons, or can be added in free text. Some practices prefer for free text NOT to be used, so check your practice requirements for this.

Booking notes give you the opportunity to record any further information that will then be available for the session holder. As an example, we'll note here that the patient's Carer will be attending with them.

If the patient has a mobile number or an email address, these will be displayed here.

You have the opportunity to check with the patient that the numbers are up to date.

If there are no numbers displayed, and your practice likes to ensure that contact details are updated here, then you may be expected to check this with the patient while booking the appointment.

Note, that any mobile or email information added here **will** be added onto the patient's Registration Record automatically – as an 'unverified' entry.

Check with the patient that they are happy with the date and time of the appointment, and when confirmed, select **'Book'**.

Depending on your practice configuration, and whether or not the patient is set up to receive text messages, they will now receive the appropriate reminders for their appointment by text.

It's also possible to print appointment slips or letters.

So let's run through another few examples.

Our next patient wants an appointment as soon as possible with a female GP.

Leave the default earliest date on today.

Check the Filter her is on Doctors.

And go into 'Advanced Criteria' and select 'Female'.

Our next patient needs a double appointment next week with a Nurse for a smear but she can't do Mondays or Fridays.

Firstly, there is the option to select 'Smear' in the Slot Type list, if your practice uses slot types in this way.

We can also select 'Nurses' in the Filter' and go into Advanced Criteria again, and filter for 2 consecutive slots.

We'll also select Monday and Friday to filter those out.

Right-click slot to book new or current patient

If you're viewing the appointment book and want to book a slot that you can see is available, you can also just right-click on the slot and select 'book new patient' or 'book current patient' depending on whether the patient you wish to book into the slot is your Active patient at the time.

Book for an unregistered patient

And there is also the option to book in an unregistered patient.

Obviously you can't Find the patient if they're not registered so you just select the slot, right click and pick 'Book unregistered patient'.

A simplified Book Slot dialog box appears and you need to complete the patient's name, reason and booking notes.

Include the patient's contact details in the booking notes as this will be the only way you can contact them if you need to.

Change the slot type if appropriate.

Unregistered patients are displayed differently from registered patients with just their name as text and no other information. Your practice might ask you to put 'Unregistered' after the name to make these stand out a little more, like this for example.

Other options when you right-click on an appointment slot enable you to add or make changes to the slots in the session if you need to make more slots available. These include:

Splitting the slot in half, or by a defined time. If you select 'by time' you can define how many minutes each new slot should be, for example if we select a 15 minute slot it will start by splitting the slot into 8 and 7 minute slots, but you can use the slider to adjust this – for example to 5 minutes and 10 minutes.

If you need to you can also **'Squeeze in' an appointment** between two slots that are already booked.

Obviously Blocked slots are blocked for a reason, but if you have permission to do this it is possible to **unblock the slot** and book a patient in. This would obviously normally only be done in consultation with the session holder. To remove the block, right-click the slot, select 'Slot Properties' and untick the 'Blocked' option.

In the same 'Slot Properties' box you are able to make other changes such as **changing the Slot Type**. Ensure you're aware of how your practice wishes these options to be used.

And remember – all changes to slots are recorded in the **'Slot History'** which can also be viewed on right click – showing what was done to the slot, when and by whom.

You can also **add slots to either the start or the end of the session** or **insert a new slot** immediately after the one you're highlighting.

Just a few more small things to know:

If you want to book a double-appointment you can highlight both the empty slots you want to use and then right-click and book the appointment, this will join those two slots into one.

And – if you need to move an appointment you can cut and paste it from one slot to another.

You'll also notice a **'Book' option in the Ribbon** which contains shortcuts for some of the actions:

With a slot selected, you can use these options to:

Book the slot for the current patient (if you have an Active patient)

Swap the patient and book the slot for the patient you are about to select

Or

Book an unregistered patient

The 'Outside Session' and 'Schedule' options relate to Scheduled Appointments which are not covered in this video.

That's the basics for finding and booking appointments on your local Practice system.