

Extended Access Training Guides

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Appointment Book Management

As this is a shared service, it is important that users adhere to certain standards when configuring their appointment sessions. This ensures that other system users are not adversely impacted by changes. Appropriate configuration in the appointment book is critical for supporting our KPI reporting for contract monitoring purposes with the CCG.

Pre-requisite Configuration

If you are using the shared EMIS system then all pre-requisite configuration has already been carried out and you can bypass this section of the guide. For practices who are hosting appointments in their own systems, we request you adopt our configuration to support the contractual KPI reporting.

Session Categories

Go to Configuration->Appointment Book and click Appts Config on the toolbar.

In the Organisation Options section, click on Session Categories.

Please configure the following non-list session categories which will support the KPI reporting. These have been named to avoid conflicts with any of your existing session categories.

Session Category Name	Will be used for sessions by
MBPCC EAS GP	GP
MBPCC EAS PANP	Prescribing nurse practitioner
MBPCC EAS ANP	Non-prescribing nurse practitioner
MBPCC EAS PN	Practice nurse
MBPCC EAS HCA	Healthcare assistant or phlebotomist

Slot Types

In the shared EMIS system, slot types are used to identify different clinician types as part of the cross-organisation appointment search function. We appreciate that practices will already have established slot types in use and we are not mandating specific wording. However, we do need to be able to identify different modes of consultation for KPI purposes so we request you have slot types that identify the following appointment types and apply them as appropriate to your extended access appointments.

- Face to face consultation
- Telephone consultation
- Video consultation

Please notify us of the wording of the slot types you will be using so we can incorporate this into our automated report processing.

We will be able to identify the mode of consultation and clinician type using a combination of slot type and session category in the reporting. The majority of our reporting will be automated so please do not edit session categories or slot types without prior consultation; this ensures we can update the code that processes our reporting.

There are some slot type specifically reserved for Bay Medical Group, Ash Trees Surgery and Park View Surgery. We will engage with these three providers directly on how these slot types should be used.

Session Templates

If your rota will be consistent then we recommend the use of session templates. Again, this is a shared system so naming conventions are important to ensure other users do not inadvertently edit and use templates for other organisations.

The settings applied to any sessions is important to assist with our KPI reporting so please pay attention to the information below to ensure correct configuration. We can assist with setup if required.

Go to Configuration->Appointment Book and click Create Session on the toolbar.

Session name

Please start your session name with your organisation abbreviation. This ensures each organisation can identify their saved templates. The remainder of the session name should be something you will understand.

Provider	Abbreviation	Provider	Abbreviation
Abbey Road Surgery	ARS	Market Street Surgery	MSS
Ash Trees Surgery	ATS	Park View Surgery	PVS
Bay Medical Group	BMG	PDS Medical	PDS
Cartmel Surgery	CS	Queen Square Surgery	QSS
Dr Murray & Partners	DMP	Waterloo House Surgery	WHS
Lancaster Medical Practice	LMP		

If you are setting up templates then the Start Date is not relevant as long as there is a date in the box.

Slot Duration

We appreciate that some flexibility is required when it comes to length of appointments, especially with the ongoing situation with coronavirus. To try and maintain some consistency of approach, we have provided the following guidelines on how long an appointment should be for different professionals.

Clinician	Slot duration
GP	15-20 minutes
ANP	15-20 minutes
Nurse	15-30 minutes
HCA/Phlebotomist	10-20 minutes

The following screenshot shows an example of creating a template GP session for Ash Trees Surgery.

Session Details

Session Name

ATS GP Monday

Session Type

Timed appointments

Start Date

15-Sep-2020

from

18:30

to

19:30

Slot Duration

15

minutes

Session Category

MBPCC EAS GP

Hide from Patient Facing Services and Diary

☐

All slots Patient Facing Services bookable

Notes

Location

Ash Trees Surgery

Service

Recurrence

No recurrence

Define...

Session Preview

ATS GP Monday

Time	Description
18:30	15 mins
18:45	15 mins
19:00	15 mins
19:15	15 mins

Ensure you select the correct session category as this is used for reporting.

Ensure you select the correct location. This is displayed to practices when searching for appointments to book and is also used for reporting purposes.

Session Holders (click to edit)

Load from template...

Save as template...

Create

Cancel

Slot Properties

Session Preview

ATS GP Monday

Time	Description
18:30	15 mins
18:45	15 mins
19:00	15 mins
19:15	15 mins

Slot Properties...

Merge Slots

Delete

Once you have completed the Session Details, you will need to apply the correct slots types in the Session Preview pane. You can select multiple slots to apply at once or do each individually. Select the slots you want to edit then right click and choose Slot Properties from the menu.

Choose the required slot type from the drop-down list.

Slot Properties

General Info

Slot Type: Default

Embargo: ANP EAS face to face consultation, ANP EAS telephone consultation, ANP EAS video consultation, **Default**, GP EAS face to face consultation, GP EAS telephone consultation, GP EAS video consultation, HCA EAS appointment

Slot Notes:

Externally Bookable:

☐ Patient Facing Services Bookable

☐ Blocked

☐ Urgent

Apply and Close Cancel

Set the Externally Bookable drop-down to be Yes – Disallow unregistered patients. This is important as practices won't be able to see any appointment unless they are set to be externally bookable.

Slot Properties

General Info

Slot Type: GP EAS face to face consultation

Embargo: Yes - Disallow unregistered patients

Slot Notes:

Externally Bookable: Yes - Disallow unregistered patients

☐ Patient Facing Services Bookable

☐ Blocked

☐ Urgent

Apply and Close Cancel

When done, click Apply and Close to return to the main Create Session screen.

Nurse and HCA sessions

In order to facilitate courier collections, the last two appointments of any nurse and HCA sessions must have a slot type applied that says NO bloods. This is to ensure that all samples are ready for collection when the courier arrives and avoids both the provider and courier being kept at site unnecessarily.

There are three groups of slot types that are reserved for use by Bay Medical Group, Ash Trees Surgery and Park View Surgery. These are identified as they reference these practices by name. If you are not one of these practices, then please do not use these slot types.

Session Holders

When using remote consultation, the session holder must be a named person who is configured with a specific NHS Role Profile. The separate User Management guide contains information on setting up users correctly. In addition, we need to consider how reception staff can easily filter sessions within the appointment book. All sessions should therefore be set up as joint sessions with both a named clinician and a location as session holders.

Click the blue Session Holders (click to edit) bar towards the bottom. Click the Add button and search for the name of your clinician who will be holding the session. Ensure the name appears in the selected items section. Next click on the Locations tab and expand the Extended Access Sites folder. Double click the site where the session will be held so that it also appears in the selected items section. When finished click Add.

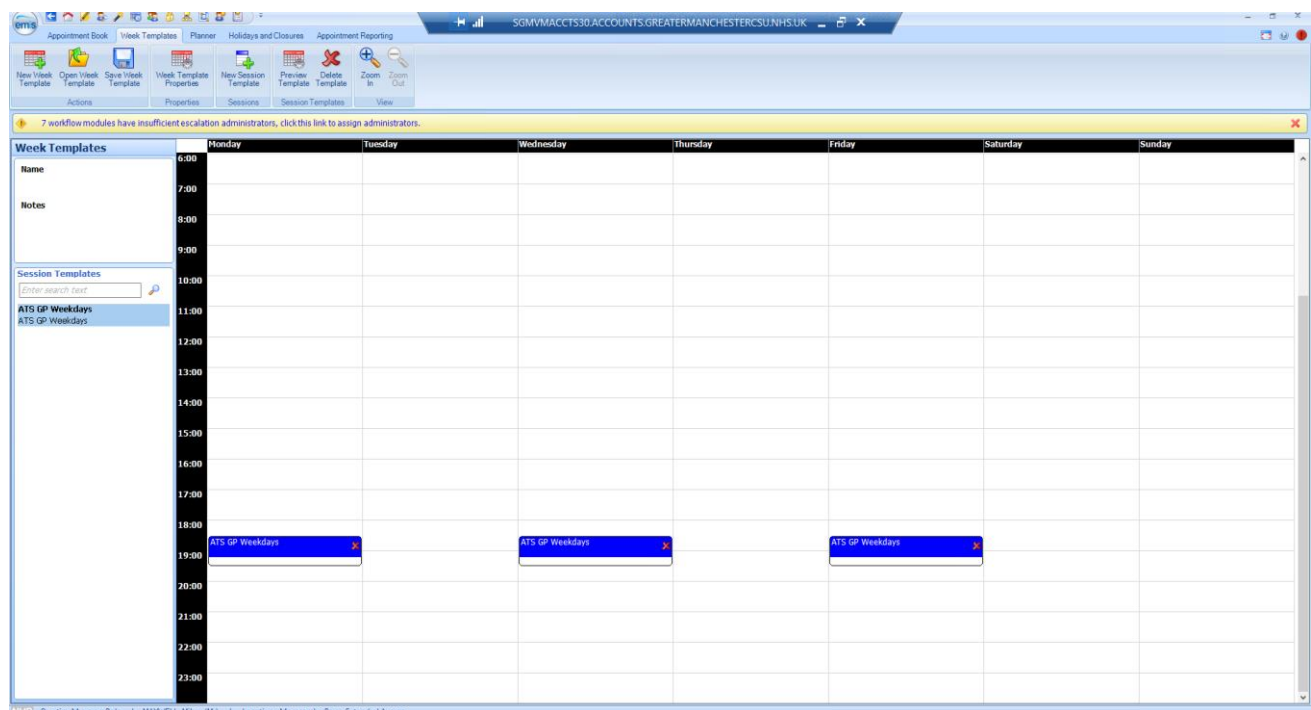
Saving template

Once you have completed all the above steps you can use the Save as template button to save your session for future use. If you have a number of similar templates to create, then you do not need to start again from the beginning. You can change details on the currently open session and then use the Save as template button to save the changed details as a new template.

Week templates

As well as saving individual session templates, you can also create a full week view for a given session holder that can then be added to the appointment book.

Got to Configuration->Appointments and move to the Week Template tab.
There should be a blank week template ready to be populated.



Drag the relevant session templates from the list on the left onto the week planner on the right. They will automatically move into the correct time based on the times configured in the session template.

Once you have placed all the session templates you require onto the week planner, click Save Week Template on the toolbar and give it a name. You can also enter any notes that may be helpful to you.

As with session templates, please start your week template name with your organisation abbreviation. This ensures each organisation can identify their saved templates. The remainder of the name should be something you will understand.

Provider	Abbreviation	Provider	Abbreviation
Abbey Road Surgery	ARS	Market Street Surgery	MSS
Ash Trees Surgery	ATS	Park View Surgery	PVS
Bay Medical Group	BMG	PDS Medical	PDS
Cartmel Surgery	CS	Queen Square Surgery	QSS
Dr Murray & Partners	DMP	Waterloo House Surgery	WHS
Lancaster Medical Practice	LMP		

You can only put a single user on each week template so you may need to save a number of different week templates to meet your rota needs.

Once you have finished you can click New Week Template on the toolbar to start a new template, or Open Week Template if you need to make any changes to an existing template.

Editing an existing week template will not change any historic sessions in the appointment book.

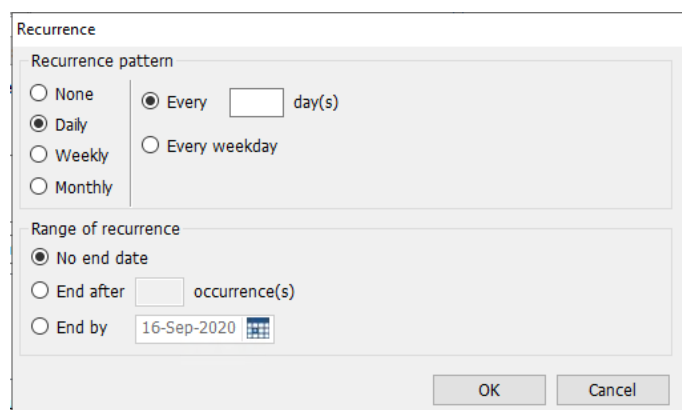
Adding sessions to the appointment book

There are a few ways that sessions can be added to the appointment book. The choice depends on what you want to add.

Ad-hoc and single recurring sessions

These are best done using the Create Session option with or without recurrence. Follow the session templates guide above to create your session. Instead of saving as a template you can click Create to enter the single session into the appointment book once you've set it all up.

For a recurring session, in the Create Session screen, click Define next to the Recurrence line.



Choose daily if you need to enter a session on every weekday, or on every second day for example. Beware that this option will include weekends.

Set the number of times you want the session to be entered or a date for it to end. Do not leave the default of no end date.

Recurrence

Recurrence pattern

☐ None
☐ Daily
☒ Weekly
☐ Monthly

Recur every week(s) on:

☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday
☐ Friday ☐ Saturday ☐ Sunday

Range of recurrence

☒ No end date
☐ End after occurrence(s)
☐ End by 16-Sep-2020

OK Cancel

Choose weekly if you want to enter a session on a combination of days in the week on a recurring week basis.

Set the number of times you want the session to be entered or a date for it to end. Do not leave the default of no end date.

Recurrence

Recurrence pattern

☐ None
☐ Daily
☐ Weekly
☒ Monthly

☒ The first day of every month(s)
☐ Day of every month(s)

Range of recurrence

☒ No end date
☐ End after occurrence(s)
☐ End by 16-Sep-2020

OK Cancel

Choose monthly if you want to enter a session on the same day of each month or on a recurring month basis.

Set the number of times you want the session to be entered or a date for it to end. Do not leave the default of no end date.

Single full week of sessions

These are best created using a week template. Go to the Planner tab of the appointment book.

Appointment Book Week Templates Planner Holidays and Closures Appointment Reporting

7 workflow modules have insufficient escalation administrators, click this link to assign administrators.

Planner

Week Templates

Enter search text

ATS Dr Test week template

Filters

MAXWELL, Mikey (Mr)

Quick Pick...

Abbey Road Surgery

Abbey Road Surgery

	w/c 14-Sep-2020	w/c 21-Sep-2020	w/c 28-Sep-2020	w/c 05-Oct-2020
Abbey Road Surgery	Select Week	Select Week	Select Week	Select Week

Practice Manager Role: MSc/SL, Mikey (Mr) Location: Morecambe Bay - Extended Access

All week templates will be shown in a list on the left so take care to only use those belonging to your organisation.

Do NOT use drag and drop within the planner as this will not add all joint session holders.

Please only use the Add Recurring Template button on the toolbar for adding all week templates.

Recurring Week Template

Week Template ATS Dr Test week template

Session Holders

COLDWELL, Christopher (Dr)
Ash Trees Surgery

Weekly Recurrence

Start Date 28-Sep-2020

Recur every 1 week(s)

☐ No end date

☒ End after 4 occurrence(s)

☐ End by 23-Sep-2020

Action to perform on conflicting sessions:

Create and keep existing sessions

Create Cancel

Use the search buttons to select the week template and session holder. Remember that the session holders must always be a person **and** a location.

Set the start date and recurrent pattern required.

Ensure you select Create and keep existing sessions for the Action to perform on conflicting sessions.

Once you click Create the process is automatic so any mistakes in here could have disastrous results in the appointment book!