



SystmOne Appointment Booking URLs

To begin configuring the SystmOne Appointment Booking URL functionality you will need to be the Group Owner of an Organisation Group. This will enable you to add new appointment invitation type options to Configured Lists.

Note: If you do not have a GP Practice Organisation group you will need to create one.

Create an organisation group

- Setup> Users& Policy>Organisation groups
- Click New group



The New Organisation Group window will appear. Complete the fields as shown below.

🍸 New Organisation Gro	up ×				
Group name	J81234 The Very Good Practice				
Parent organisation group	Bath And North East Somerset Pct (Trust Group)				
Function / speciality	General Practice				
General description	Organisation group (configured lists)				
Membership terms	Other organisations can freely join this group				
	Membership must be approved by your organisation				
	Allow reporting across entire group - makes patient identifiable data viewable				
	Restrict group-wide reporting to group owner				
	Strategic reporting group				
	Only group owner can publish templates, reports etc. to group				
	Copy share preferences between units				
	Enable rota sharing across group and share QOF alerts				
	Always share all patient data between group members				
	Maternity group				
Copy configured list options					
	Qk Cancel				

Group name – add your Practice code and Practice name

Parent organisation group e.g. Gloucestershire, Wiltshire, BaNES, or Swindon PCT (Trust Group)

Function / specialty – add General Practice

General description – add free text description

Membership terms - Membership must be approved by your organisation

Click OK

NB: No Patient Identifiable Data is included in this document. Any visible patient data is from a training system or the identifying features have been redacted.

The Organisation Group Invitation window will appear.

You will not be required to Invite other organisations to join your Organisation group so click **Cancel**.

Organisation Group Invita	tion	×
The selected organisations	will receive tasks asking them to join this organisation gro	up.
Organisation 🔍 🗙		
rganisation Name		
	No organisations selected	
	<u>O</u> k <u>C</u> ancel	

In **Setup>Users& Policy>Configured Lists** your GP Practice Organisation group will now appear in the list of available groups.

Configure Appointment Invitation Types

To set up a new Appointment Invitation Type:

- Select Setup>Users & Policy>Configured lists
- > Expand Organisation Groups folder
- Expand Practice code folder, L81....

Note: if there are no subfolders under the Practice code L81..., right click the Practice code folder and select **Create all options for this group**.



You will now see the subfolder configuration appear as in the image below.

Only show lists that contain permitted options			
∧ I Organisation Groups			
🗸 🔤 Central Cheltenham Network			
∧ 📑 L84041			
V A&E / MIU			
🗸 🔤 Admin			
🗸 🔤 Admission			
🗸 🔤 Appointments			
🗸 🔤 Care Plans			
Consultation / Contact			

- Uncheck Only show lists that contain permitted options
- > Expand the **Appointments** folder
- > Appointment Invitation Type will now be displayed
- Select Appointment Invitation Type



> On the Configure List toolbar select New Option



Note: Decide which appointment types you want to make available for booking via URL.

- Enter the Appointment Invitation Type **Option text**, e.g. Blood Test, Flu vaccination, Smear test, Asthma review etc.
- Select an Icon
- > Tick Include in default configuration
- > Click OK

The Appointment Invitation Type created will now appear in the Configured list Permitted Options. In this example we have created "Blood test".

National codes extract type	All	•	
Permitted Options (Cu	istom Configuration)		
ight Blood test			
Other Options			
COVID-19 Vaccination	1st Dose		
COVID-19 Vaccination	2nd Dose		

Allocating Appointment Invitation Type to a Rota Type

To allow patients to book appointments via a URL, you will need to decide which rotas and/or slots you wish to make available. You should name your rota and slot types in a manner that is easy for patients to identify. This will help patients to navigate to the correct appointment type. For example, a Doctor's rota could include 'Face-to-Face Appointment' or 'Telephone Appointment'; and a Nurse rota could include 'Travel Vaccination' and 'Cervical Smear'.

After you have arranged your rota and slot types, you will now need to set up which rota types to link to each of the Invitation Types that were set up as configured list options.

- > Select Setup>Users & Policy>Organisation Preferences
- Within Appointments expand the Letter/Label Printing node
- > Select Patient Appointment Invitation



The following window will open:

Note: You can set a limit on how far in the future to permit appointment booking, which can be between 1 and 60 days in advance. **Permit patients to book appointments in the next # days.**

Enter text to search Search Clear	Permit patients to book appointments in the next 14 🗧 days		
Booking Days & Times DNAs External Appointment Booking Ease	Allow booking in to all slot types Specify bookable and types Allow booking in to all rota types Allow booking in to all rota types Specify bookable rota types Specify bookable rota types		
Fagas IGP Connect Forvider Consumer Consumer Consumer Macolamoous Patient Appointment Invitation Selent Appointment Invitation Of Patient Check-in Of Patient Check-in Remote Booking Rida Reminders	Rota Type Flu over 65 Healthcare Assistant Improved Access - ANP Location Medical Review Clinic Midwife MMR Clinic NHS 111 NHS 6 Clinic On call Slots OP Emergency Surgery Overlon Covid-19 Vaccination Clinic	Buowdeat	
 Staff Ordering 	Philotomist		
 Video Consultations Waiting Time Colours 	Session Smear Clinic Social Prescriber		

- Select Specify bookable slot types
- Search for the slot type associated with this type of appointment, e.g. Phlebotomist blood test
- Select Specify bookable rota types
- Search for the appropriate rota type, e.g. Phlebotomist
- In the Rota Type list at the bottom of the screen, locate the rota type and link the Patient Invitation type by ticking the box. Note: This will link the rota type Phlebotomist with the Patient Invitation Type, Blood test.
- Click OK

Continue to create Patient Appointment Invitation types for each of the appointment types you wish to enable. Link the appointment type to the Specific slot type and Rota type.

In this example, we have created a patient appointment invitation type for Cervical Screening and linked it to the Cervical Smear slot type and Nurse Clinic rota type.

Enter text to search Search Clear	Permit patients to book appointments in the r	with a unique UFL for each patient ext 14 +	
External Appointment Booking Flags GP Connect Provider	Allow booking in to all stort types Allow booking in to all stort types Allow booking in to all rota types Specify bookable rota types Specify bookable rota types X	Phiebotomist Cenical Smear Nurse clinic Phiebotomist	
Consumer Electric /Label Printing Miscellaneous		cial Screening	
Patient Appointment Invitation Second Seco	Rota Type Coniti 2020 Contris 1-5 Extended Hours Extended Hours Peripheral Clinic ELLICLINIC		
Rota Reminders Slot Types	Friday late emergency HCA clinic		
 Staff Ordering Video Consultations 	Medicals Mental Health Clinic		
Waiting Time Colours Bookmarked URLs	Nurse clinic Nurse clinic Nurse Practitioner		
* CDA	Phiebotomist Routine AM		

Sending an Appointment invitation URL to the patient

Patient appointment invitation URLs can be sent in bulk from a clinical report or waiting list. They can also be sent to an individual patient by clicking the Patient Appointment Invitation button on the toolbar in the patient record. *Note*: *you will need to add the button to your toolbar*.

In a clinical report or waiting list, highlight the patients you want to send the URL to, right click and select the Send Patient Appointment Invitation action button or click

on the bulk actions toolbar. *Note*: the mobile telephone icon is used for other actions in clinical reporting so ensure that you hover and select the correct one.



Choose the invitation type from the configured list created earlier, e.g. blood test and click OK.



The Communications Annexe screen opens showing the Contact Details for the patient.



> Choose whether to send the URL message link via SMS or Email.

Note: each time you send a link to a patient, a new unique link is generated. If you send one link via SMS and one via Email, the patient will end up have two active invitations.

- > Type the message text.
- Copy and paste the message in Organisation or User Presets for future use if appropriate.
- Preview the message before it is sent if necessary. There's a 99-character limit for SMS messages including the URL.
- Click Send.
- This will send the patients either an SMS or email message with a unique link to SystmOne's appointment booking website.

Note: the link is active for 7 days. If the patient fails to book during this time, another link will need to be sent.

Sending an Appointment invitation URL from the Patient Record

There is also an option to send an appointment invitation from within the patient record. To do this you will need to add the **'Send a unique appointment URL to the patient'** button to your practice toolbar.

Patien	d a unique appointment URL to the patient

Patient books appointment

When the patient receives the link and clicks on it, they will need to enter their date of birth to confirm their identity. *Note:* the patient does not need to have access to SystmOnline to book an appointment in this way.





The patient will then be presented with a list of available appointments and information about location, clinician and start/end time.



Once they have chosen an appropriate session, the patient will have a choice of available slots and can pick the date and time of their appointment.

Booked Appointments will appear in the Appointment Ledger in SystmOne as normal. An appointment flag will indicate that the appointment was booked online.

To amend or cancel the appointment the patient will need to contact the GP Practice.

Testing the configuration

- Create the Appointment Invitation Type and link to an appropriate rota.
- > Add your mobile number (temporarily) to a test patient record.
- > Click the 'Send a unique appointment URL to the patient' button on the toolbar.
- Select the appointment invitation type
- Select send via SMS or Email
- Follow the onscreen prompts

- > The appointment invitation should now be received via SMS or Email
- Click the URL and book an appointment
- > The appointment will now appear in the appropriate rota

Tracking appointment invitations

You can track the status of your appointment invitations on the Patient Appointment Invitations screen. You can access this screen by going to **"Audit" > "Appointments" > "Patient Appointment Invitations"**.

Once a patient has been sent an invitation, they will appear on the screen shown below. This can be filtered to display a date or range of dates on which the invitations were sent. Once you have selected the dates, click the refresh button to see your list of invites. You can see the details of who the invite was sent to, along with the invitation type and details of the subsequent appointments that have been booked.

It is also possible to delete invitations (right click option) providing the invitation has not been linked to an appointment. If the invitation is deleted the URL will be revoked and the patient will be shown an error if they try to book an appointment using the URL.

Refresh										
Invitation sent	v	and	•	Invitation type	9		Include delete	d invitations		
Appointment date	v	and	•	Appointment status		•	~			
First Name	Surname		NHS N	umber	Invi	ritation Type	Invitation Sent V	Invitation Sent By	Appointment Date	Appointment Status

Note: if a patient has DNA'd or cancelled an appointment and you want to send them a new Invitation link, this can be done by right clicking the patient and selecting Send Patient Appointment Invitation.

Patient Record

Appointment Invitations can also be viewed within the Patient Record. Select the Appointments Visits & Tasks node to access this.



Manual Appointment Booking

There will be occasions where you still need to manually book appointments for patients. In these cases, SystmOne will attempt to link the appointment back to the invitation (if one

was sent) or create an invitation at the point of booking the appointment. This is so that that these appointments can be tracked alongside the patients that booked online.

When the appointment is being booked, 1 of 2 prompts will appear depending on whether the patient has been sent an invitation or not. The option the Receptionists select following the prompt will determine whether the patient is added to the Patient Appointment Invitation Report or not.

The advantage of linking appointments to invitations is so that you can see them on the Patient Appointment Invitations screen and have the option to use this to schedule future vaccinations.

Note: please read the notes below and decide which option should be selected from the SystmOne Question prompts.

Notes for Receptionists and Practice Managers

Appointment Invitation Link has been sent

In this example, the patient has been sent a link so therefore has a current invitation. Confirm with the patient that they have received a URL link and select **Yes** to this message. This will link the appointment invitation to the booked appointment and the patient will appear in the Patient Appointment Invitation report.



Appointment invitation link has not been sent

If the patient did not receive an appointment invitation link and your Practice do not want them to be added to the Patient Invitation report then click **No** to this message. However if they do want the patient to be added to the Patient Invitation Report select **Yes**. *Note:* please confirm which option you should select with your Practice Manager.

Question		×
?	This rota is linked to an appointment invitation type.	
\sim	Would you like to create an invitation and mark it as booked?	
	<u>Y</u> es <u>N</u> o	

Appointment cancellations

If the patient wishes to cancel an appointment, **Cancel** the appointment in the Appointment Ledger in the usual way. If the following Question prompt appears and the patient would like to rebook the appointment with you now select **No** to this message and book the appointment manually as normal.

If the patient would like to be sent an invitation link so they can rebook the appointment online themselves later, select **Yes**.

Question		×
?	The appointment(s) cancelled were linked to invitation(s).	
\sim	Would you like to resend the invitations?	
	<u>Y</u> es <u>N</u> o	

The Appointment Invitation Type options window appears. Ask the patient what type of appointment they need to rebook and select from the **Type** dropdown list, e.g. Blood Test, Cervical Smear etc. This will send a link to the patient and they can book the appointment online themselves.

7 Appointment Invitation Type			
Type 🔍 🧪 Blood test			
	<u>O</u> k <u>C</u> ancel		

VERSION CONTROL

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CHANGE CONTROL

Document Title	Version	Date		Change	Purpose	Approved
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Appointment				disclaimer		
Booking URLs				to footer		

