SystmOne Appointment Booking URLs

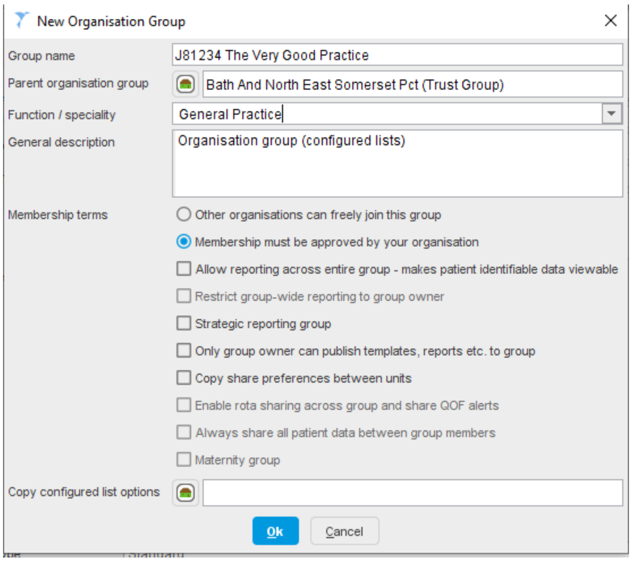
To begin configuring the SystmOne Appointment Booking URL functionality you will need to be the Group Owner of an Organisation Group. This will enable you to add new appointment invitation type options to Configured Lists.

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.



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

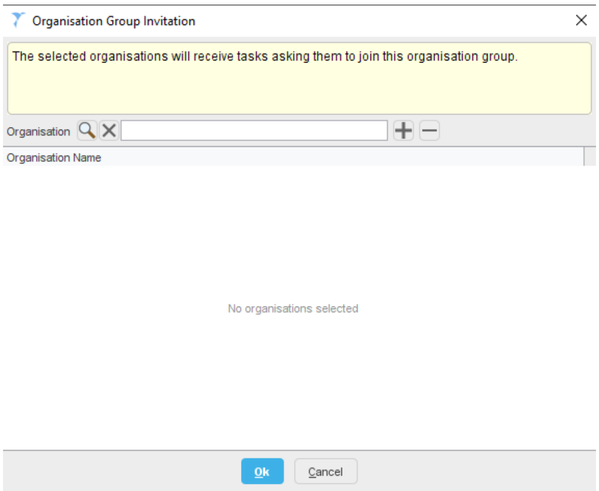
Membership terms - Membership must be approved by your organisation

- 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**.



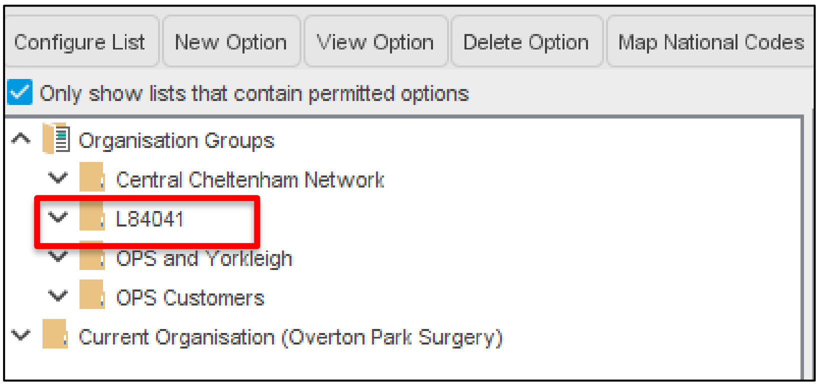
In **Setup>Users& Policy>Configured Lists** your GP Practice Organisation group will now appear in the list of available groups.

Configure Appointment Invitation Types

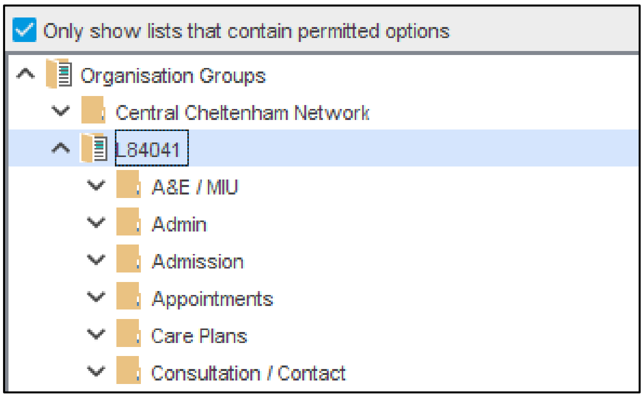
To set up a new Appointment Invitation Type:

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

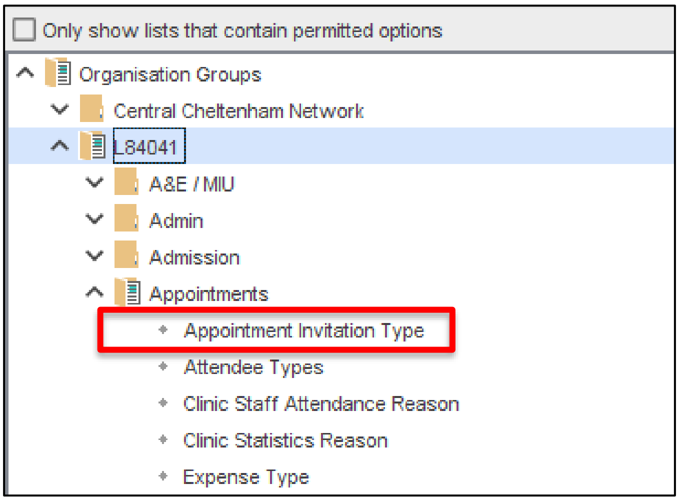
  ***Note**: if there are no subfolders under the Practice code L81…, right click the Practice code folder and select **Create all options for this group**.*



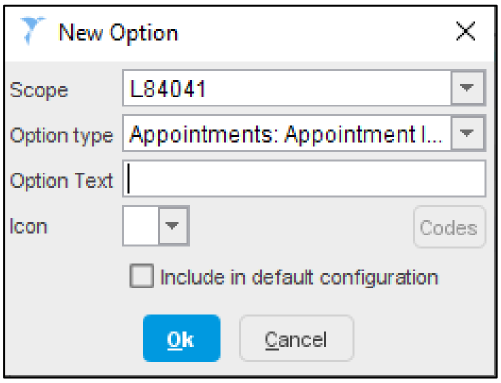
You will now see the subfolder configuration appear as in the image below.



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



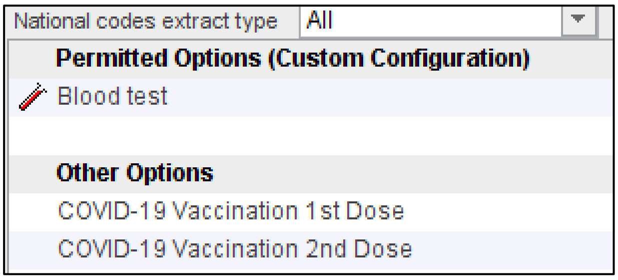
- On the Configure List toolbar select **New Option**



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”.



Allocating Appointment Invitation Type to a Rota Type

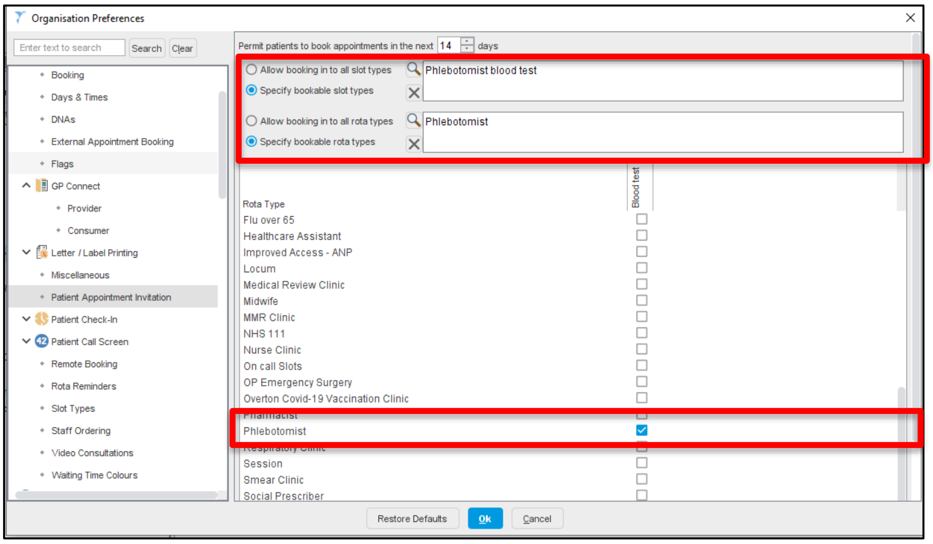
To allow patients to book appointments via a URL, you will need to decide which rotas and/or slots you wish to make available. You should name your rota and slot types in a manner that is easy for patients to identify. This will help patients to navigate to the correct appointment type. For example, 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:

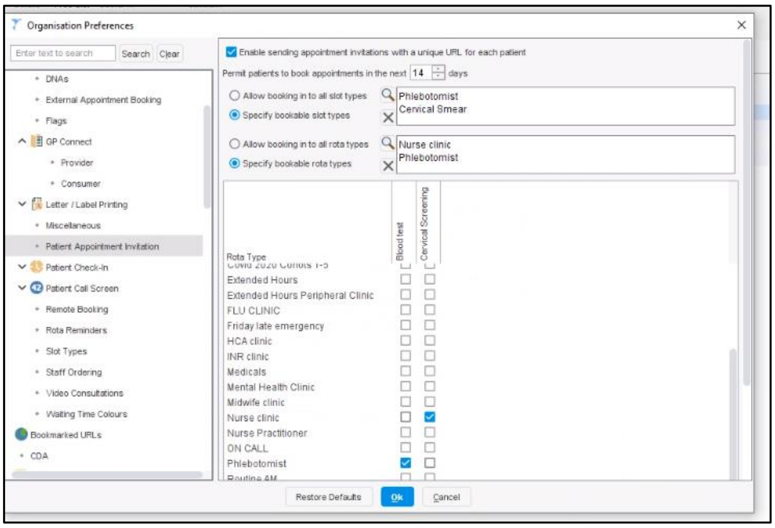
Note*: You can set a limit on how far in the future to permit appointment booking, which can be between 1 and 60 days in advance.* ***Permit patients to book appointments in the next # days.***



- 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.

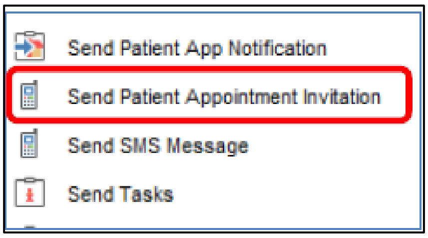
In this example, we have created a patient appointment invitation type for Cervical Screening and linked it to the Cervical Smear slot type and Nurse Clinic rota type.



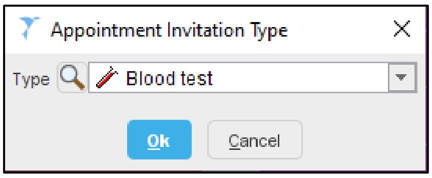
Sending an Appointment invitation URL to the patient

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.*

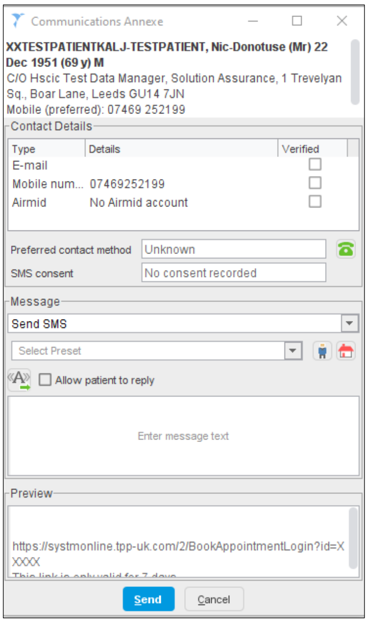
- In a clinical report or waiting list, highlight the patients you want to send the URL to, right click and select the **Send Patient Appointment Invitation** action button or click  on the bulk actions toolbar. ***Note****: the mobile telephone icon is used for other actions in clinical reporting so 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.

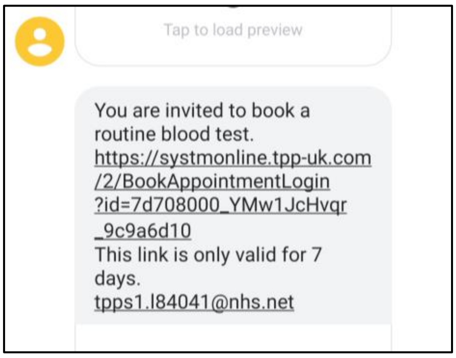
__Note__: the link is active for 7 days. If the patient fails to book during this time, another link will need to be sent.

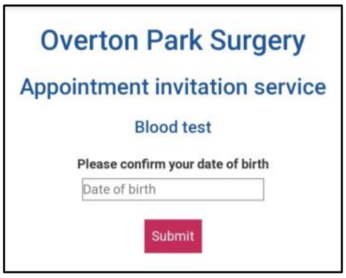
Sending an Appointment invitation URL from the Patient Record

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.

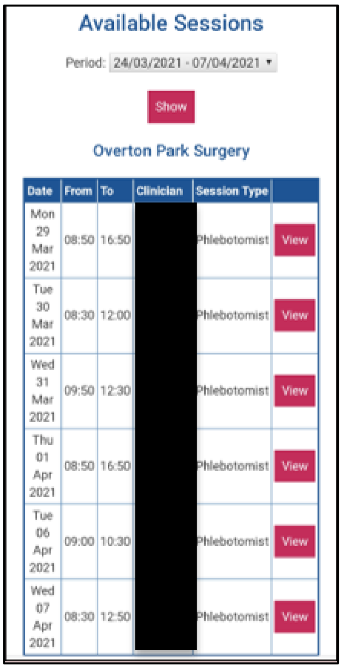
Patient books appointment

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

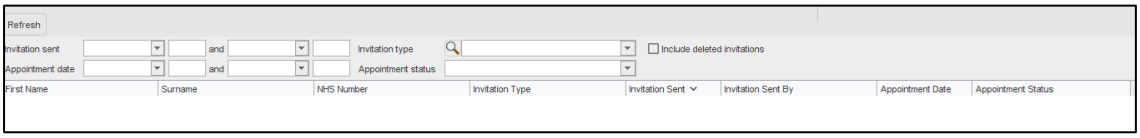
- Create the Appointment Invitation Type and link to an appropriate rota.
- Add your mobile number (temporarily) to a test patient record.
- Click the ‘Send a unique appointment URL to the patient’ button on the toolbar.
- Select the appointment invitation type
- Select send via SMS or Email
- Follow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

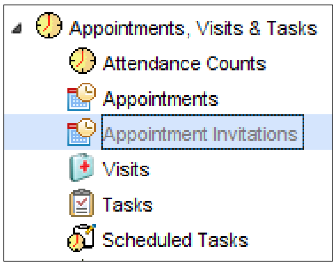
Once a patient has been sent an invitation, they will appear on the screen shown below. This can be filtered to display a date or range of dates on which the invitations were sent. Once you have selected the dates, click the refresh button to see your list of invites. You can see the details of who the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



***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.

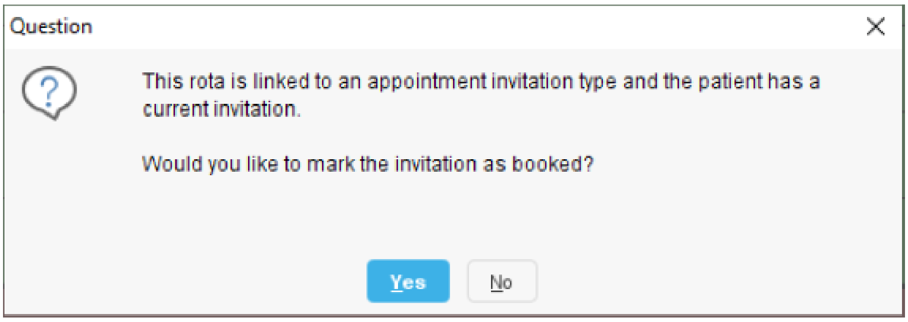
When the appointment is being booked, 1 of 2 prompts will appear depending on whether the patient has been sent an invitation or not. The option the Receptionists select following the prompt will determine whether the patient is added to the Patient Appointment Invitation Report or not.

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.

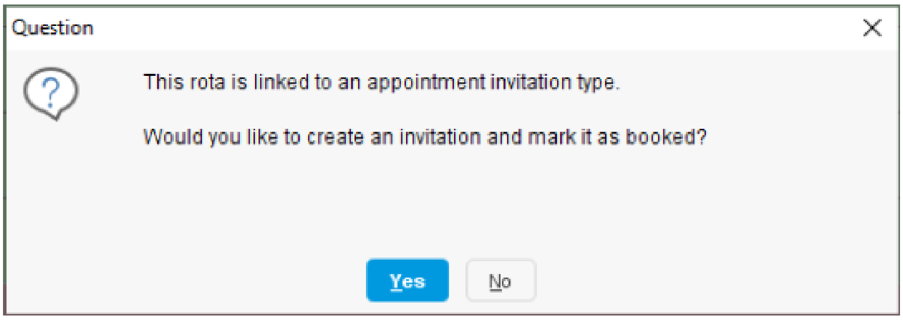
***Note**: please read the notes below and decide which option should be selected from the SystmOne Question prompts.*

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.



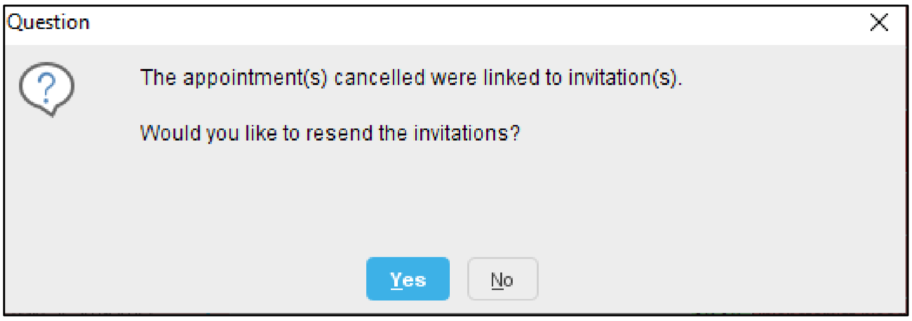
Appointment invitation link has not been sent
If the patient did not receive an appointment invitation link and your Practice do not want them to be added to the Patient Invitation report then click **No** to this message. However if they do want the patient to be added to the Patient Invitation Report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



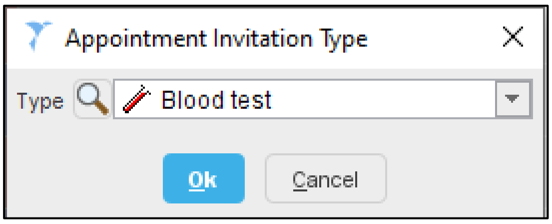
Appointment cancellations

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**.



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.



VERSION CONTROL

Document Title	Document Type	Version	Date	Source
SystmOne Appointment Booking URLs	Crib Sheet	1.0	1/4/21	SCW CSU

CHANGE CONTROL

Document Title	Version	Date	Author	Change	Purpose	Approved
SystmOne Appointment Booking URLs	1.1	21.6.21	JLB	Added disclaimer to footer	Update	JLB