2025

Appointment Setup & Configuration

USER GUIDE

PRIMARY CARE SYSTEMS TRAINING TEAM

North West London

Contents

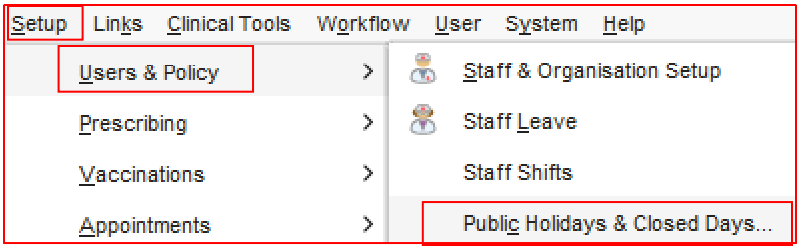
Introduction

This user guide is aimed at providing staff with clear instructions on setting up and configuring appointments in SystmOne.
Staff will still require specific role-based training and this is highly recommended.

Before creating and updating rota templates, certain configurations must be completed. This includes adding closed days and recording staff leave to ensure that rotas are applied correctly and do not conflict with staff availability or scheduled time off.

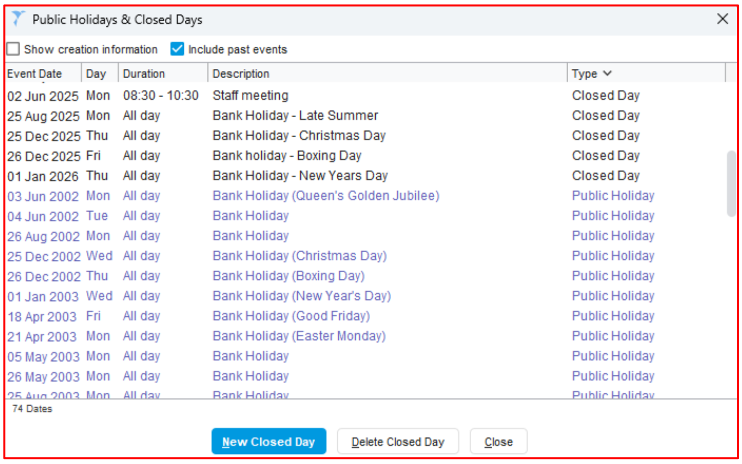
Closed Days

To view Public Holidays and Closed Days, select **Setup** menu – **Users & Policy** – **Public Holidays and Closed Days** from the Main Menu.

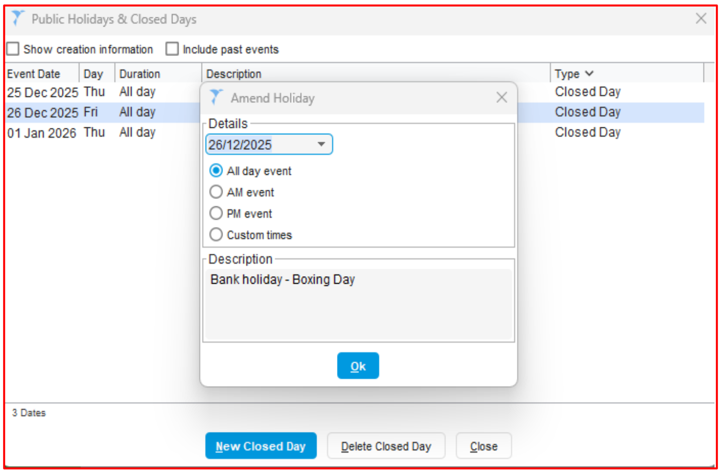


It is important to enter promptly any days that your organisation will not be open for appointments (closed days) to ensure that no appointments can be inadvertently booked on those days. Public holidays are already recorded for you.

Public holidays are listed in **blue** text and closed days are listed in **black** text.



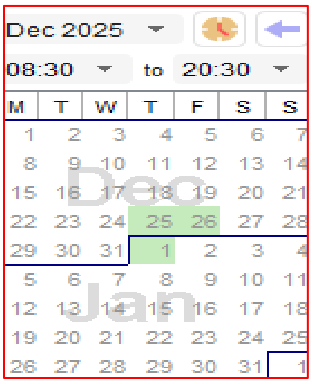
To amend a closed day, right click on the entry you want to amend and select **Amend**.



The following options are available in the Public Holidays and Closed Days dialog:

<u>**Option**</u>	<u>**Description**</u>
Show creation information	Select this tick box to see when a public holiday or closed day entry was added and who added the entry.
Include past events	Select this tick box to view all public holidays and closed days entered, including those in the past.
New Closed Days	Enter the details for a closed day.
Delete Closed Day	Delete the selected closed day.
Close	Close the Public Holidays and Closed Days dialog.

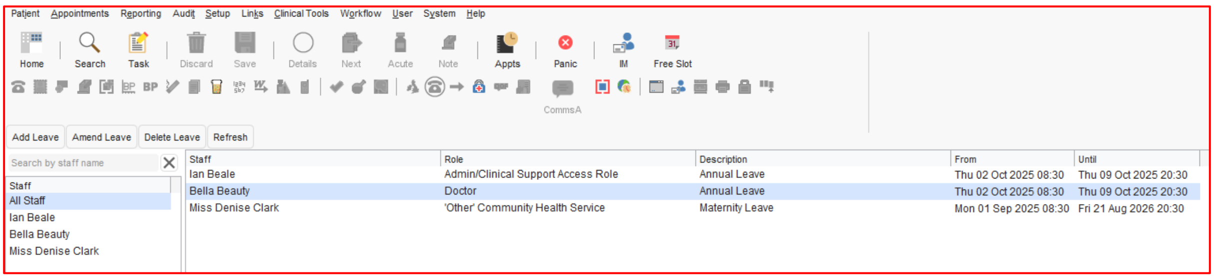
Grids for appointments (within the Appointment Ledger screen) and visits are coloured **pale green** on public holidays and closed days, and the system will alert you if you try to add rotas, book appointments or record visit requests for these days.



Using the Staff Leave Screen

To view the Staff Leave screen select **Setup** – **Users & Policy** – **Staff Leave** from the Main Menu.

The Staff Leave screen allows you to manage leave for members of staff at your organisation.

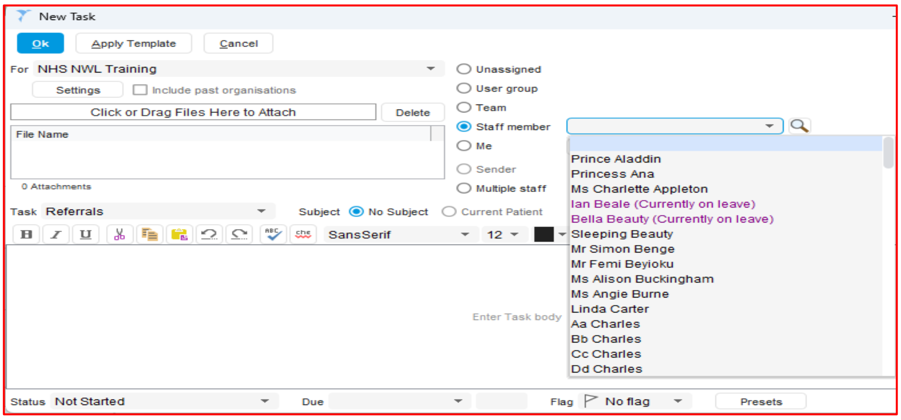


The following options are available on the Staff Leave screen:

Option	Description
Add Leave	Record details of leave for a member of staff
Amend Leave	Amend the leave details for the selected entry
Delete Leave	Delete the leave details of the selected entry

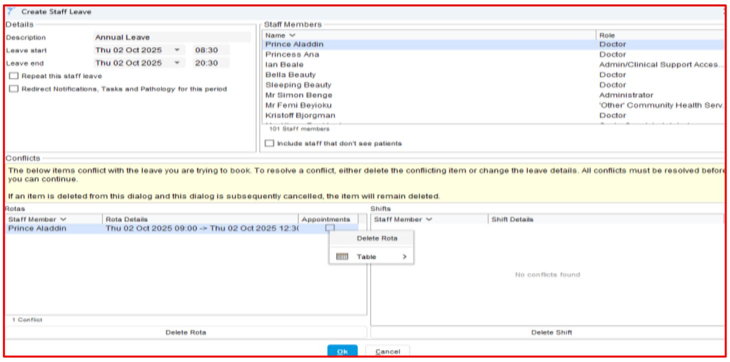
Staff on leave are highlighted in the following ways on SystmOne:

- In purple text when selected from the New Task and New Notifications dialogs.
- Cells relating to staff on leave are shaded bright purple in the grid on the Visits screen.
- A purple rota blocks out the appropriate column on the Appointments Overview/ Appointment Ledger for staff on leave.



Recording Leave

1. To record details of leave for a member of staff, select **Setup** – **Users & Policy** – **Staff Leave** from the Main Menu.
2. Select **Add Leave** from the options on the top left hand side.
3. Type the description of the type of leave, e.g. annual leave, maternity leave.
4. Specify the leave start and end date and time.
5. Select **Repeat this staff leave** and specify the frequency and end fate, if you are recording recurring leave.
6. Select **Redirect Notifications, Tasks and Pathology for this period**, if required, and complete the Redirect Notifications, Tasks & Pathology dialog.
7. Select the staff member from the list displayed. To record leave for staff who do not appear on the Appointments Ledger, select **Include staff that do not see patients** first.
8. Check the "Conflicts" section to see whether the relevant staff member has any rotas that fall within the specified leave period. If the tick box under "Appointments" is not selected for the rota(s) displayed, select each rota in turn and click Delete Rota. When all rotas have been deleted click OK.
9. If the tick box under "Appointments" is selected, it means that the rota contains booked appointments and you cannot proceed to record the staff leave. You must first delete the rota(s) from the Appointments grid and store the appointments for rebooking before you restart the process to book staff leave.
10. Click **OK**.



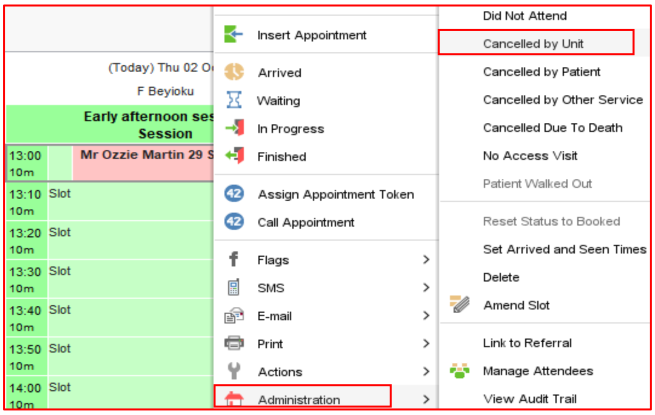
Deleting a Rota in Order to Book Staff Leave

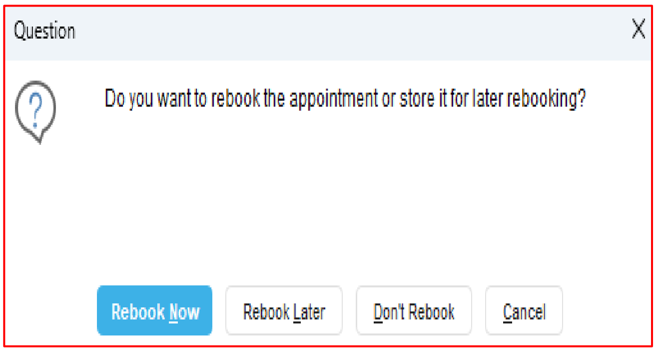
If you need to book leave for a member of staff on a day that contains booked appointments for that person, you will need to delete that instance of the rota before the system will allow you to record the leave.

- Navigate to the relevant day in the Appointments Ledger.

If there are appointments already booked, cancel each appointment that is booked into the chosen rota:

- Right click on the slot and select **Administration** – **Cancelled by Unit**.
- This then given the option to **Rebook Now** or **Rebook Later**.





If you are able to contact the patient before deleting the rota:

- Select **Rebook Now** and a small **Rebooking Appointment** window will open.
- Go to the appointment slot that you wish to rebook the patient into, right click Rebook Appointment, and click OK.

If you have not been able to contact the patient:

- Select **Rebook Later**.
- The **Rebook Later** option stores the appointment for rebooking.
- Appointments stored for rebooking are listed here – **Appointments** Menu – **Appointments for Rebooking**.

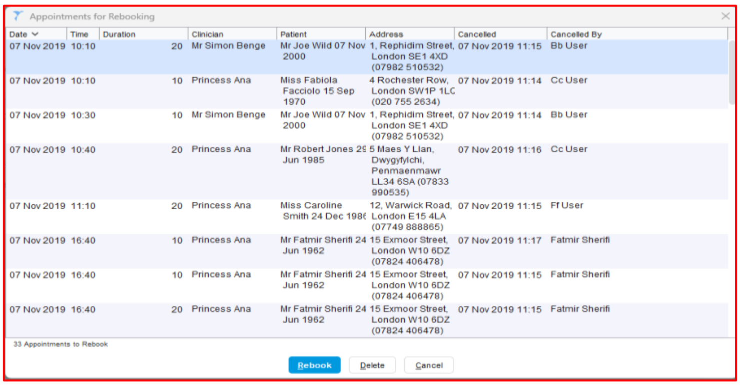
Once all booked appointments have been managed:

- Right click on the rota and select **Delete**.
- Click **Yes** to confirm that you want to delete the rota.

The rota is removed from the Appointments Ledger screen.

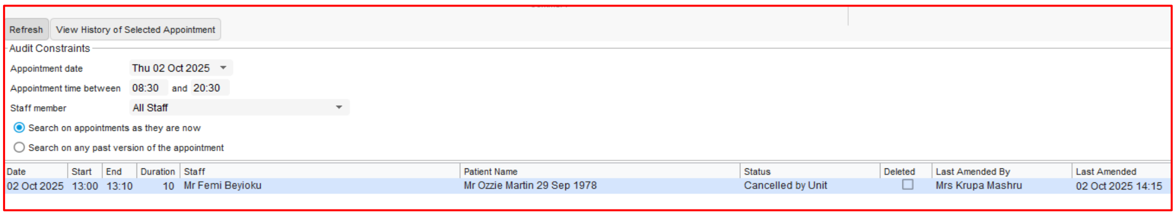
It is now possible to book leave on that day for the relevant member of staff.

You must rebook any stored appointments from the **Appointments** Menu – **Appointments for Rebooking**. You need to highlight the appointment and click Rebook at the bottom of the window and proceed as previously shown.



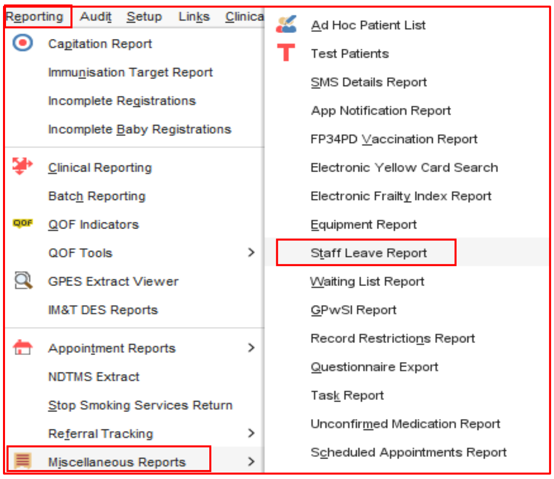
If you have accidently deleted a patient from a rota:

- Select **Audit** menu – **Appointments** – **Appointment Changes**.
- Add the date that the rota was deleted and run. Patients will have to be manually booked into the new rota.



Reporting on Staff Leave

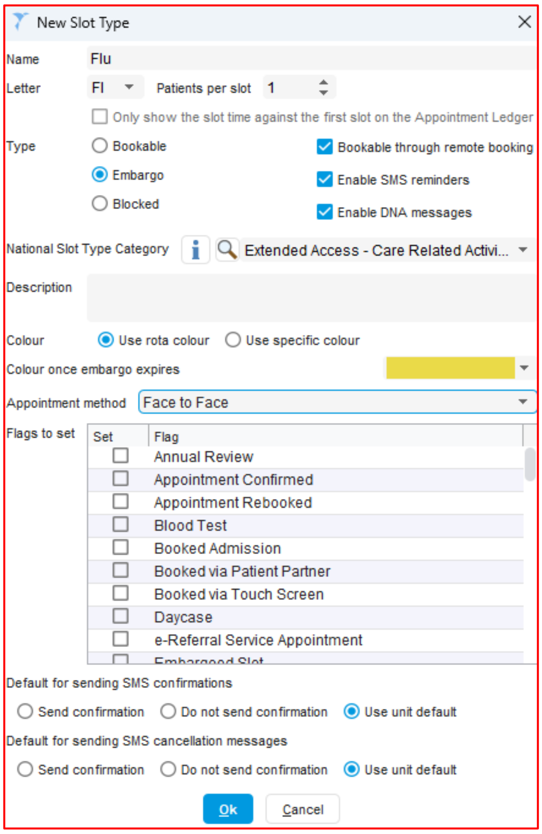
To create a report on staff leave at your organisation, select the **Reporting** menu – **Miscellaneous Reports** – **Staff Leave Report**.



Creating Slot Types

Creating slot type is important because they help organise and manage appointment scheduling efficiently. Each individual appointment can be setup as a specific slot type.

Select **Setup** – **Appointments** – **Slot Types** from the Main Menu.



1. Select **New Slot Type**.
2. Type a **name** for your slot type.
3. Select an entry from the **Letter** drop down list to represent the slot type (those that have already been used are not available for you to select).
4. Specify the number of patients that can been booked into the slot type, via **Patients per slot** drop down option.
5. Deselect **Bookable through remote booking** if you do not want this slot type to be available through remote booking.
6. Deselect **Enable SMS reminders** and/or **Enable DNA messages** if you do not want automatic text messages to be sent to patients booked into this slot type.
7. Select one of the standard slot **Types** to identify the type of slot you are creating, e.g. Embargo which will be available on the day and cannot be booked until a certain time.
8. Select the appropriate **National Slot Type Category**.
9. Type a **Description** for the new slot type.
10. Select a **Colour** for your slot type or specify that you want to use the same colour as the rota in which the slot type is being used (if the slot type is "Embargo", select the colour the slot will become when embargo has expired).
11. Select any **Flags to set** that are relevant to your slot type.
12. Select the appropriate option from the "Default for sending SMS confirmations section:
    - Send confirmation – the send SMS confirmation option will be preselected on the Book New Appointment dialog for this type of slot.

- Do not send confirmation – the send SMS confirmation now option will not be preselected.
- Use unit default – the SMS setting in Organisation Preferences is used. To check, select **Organisation Settings** – **Email & SMS** – **SMS & Appointments** in the **Appointments Settings** tree and see whether **Automatically send appointment confirmations** is selected.

Using the Rota Type Dialog

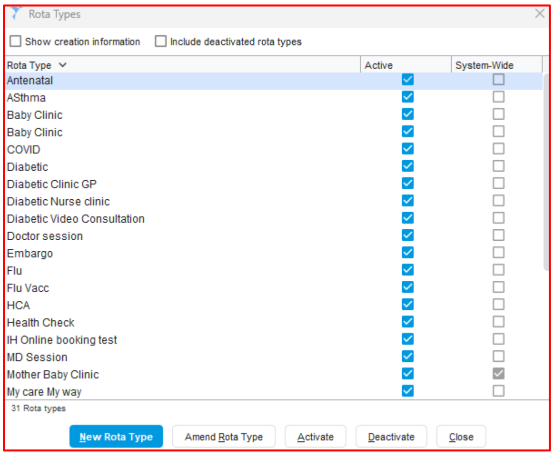
The Rota Type dialog is used to define and manage different types of staff rotas, it helps ensure that rota templates are applied correctly and that appointments align with how your practice operates.

To view the Rota Type dialog, select **Setup** – **Appointments** – **Rota Types** from The Main Menu.

Note: Only System Administrators can create and manage rota types.
Rota types allow you to categorise the rotas you create so that they are arranged in meaningful groups, e.g. Asthma, Diabetes, Antenatal.

When you view the list of rota templates, they are grouped by rota type making it easier for you to find the rota template you want.

The Rota Types dialog allows you to create new rota types and manage existing ones. **Tip:** It is possible to deactivate rota types that are not used in your organisation, which means that only the rota types that you want to be used are available.

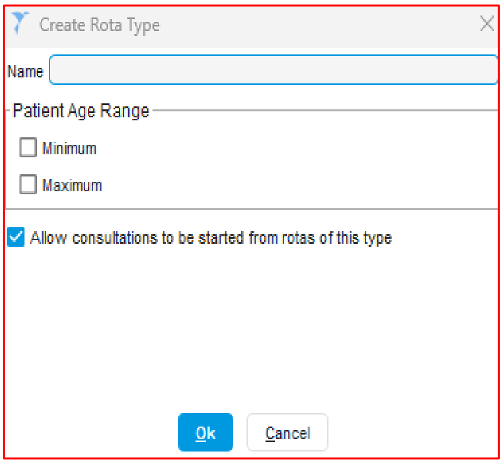


The following options are available on the Rota Types dialog:

Option	Description
Show creation information	View creation information for the rota types displayed
Include deactivated rota types	View rota types that are no longer active
New Rota Type	Create a new rota type
Amend Rota Type	Amend the patient's age ranges specified on the selected rota type
Activate	Make the selected rota type active
Deactivate	Make the selected rota type inactive
Close	Close the Rota Types dialog

Creating Rota Types

To create a new rota type:



- Select **Setup** – **Appointments** – **Rota Types** from the Main Menu and click **New Rota Type**.
- Type the name of the rota type.
- Specify the age range the rota type applies to (optional). If an age range has been specified for a rota type and you try to book a patient who falls outside the specified age range into a rota of that type, the system will check that you want to continue.
- Deselect the option if you do not want to **allow consultations to be started from rotas of this type.**
- Click **OK**.

Overview of Rota Templates

Rota templates are used to create appointment rotas for booking patients into. By using a template, it is easy to ensure that you are providing the same number and type of appointments on each day, especially when used in conjunction with the ability to auto-apply a template.

To view a list of rota templates that have been created in your organisation, select **Setup** – **Appointments** – **Rota Templates** from the Main Menu.

A list of rotas created is displayed in the Rota Templates screen.

Left Hand Side – the tree breaks down the list of templates by:

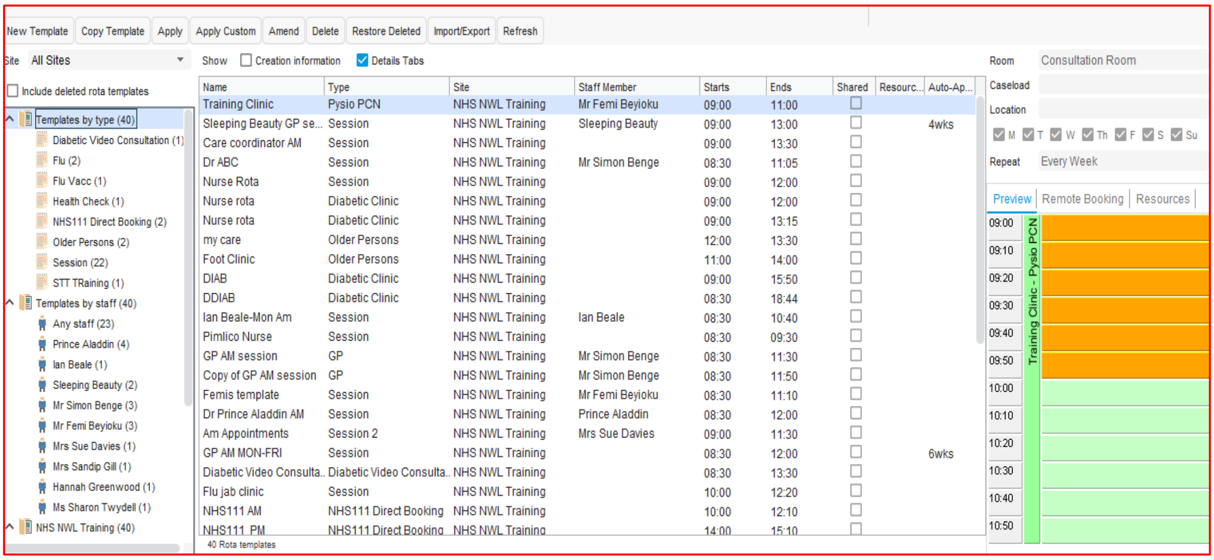
- Rota type
- Staff member
- Site/branch broken down by appointment room

Middle Pane – a list of the rota templates that have created are shown here.

Right Hand Side – Three tabs are there (provided the **Delete Tabs** option has been selected):

- **Preview** – shows a preview of the selected rota, including booked slots. Hover the mouse over both booked and empty slots to view details.
- **Remote Bookings** – if the selected rota is shared to other organisations for the purposes of remote booking, this tab will show a list of organisations the rota id shared to.
- **Resources** – shows the resources required for the selected rota, including the number of rooms, staff members, items of equipment or a dispensary stock line.

Rotas can be created for each staff member and then apply them for as many days, weeks or months as required.



Creating Rota Templates

Select **Setup** – **Appointments** – **Rota Templates** from the Main Menu.

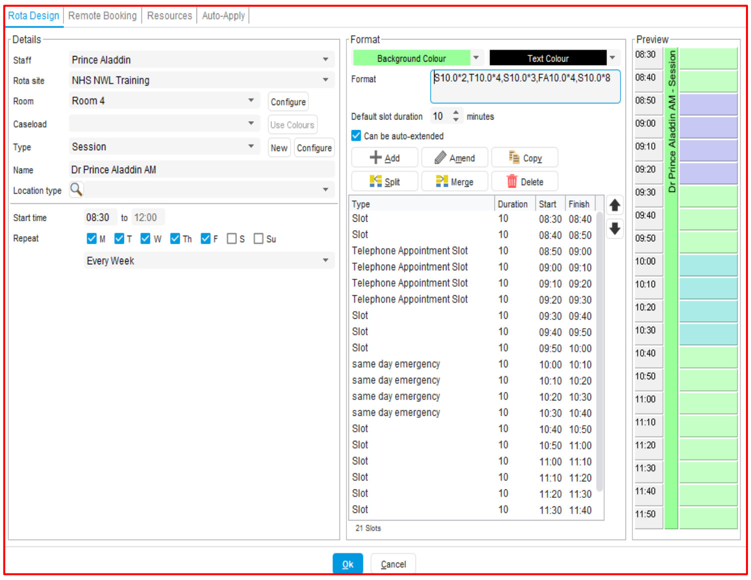
Select **New Template** - the Rota Design of the Create Rota Template dialog is displayed.
The Create Rota **Template** dialog has the following tabs:

- **Rota Design** – allows you to configure the rota template details and set up the number of slots, days of the week, frequency, etc.
- **Remote Booking** – this allows you to share a rota template with other organisations for the purposes of remote appointment boking.
- **Resources** – link the rota template to one or more rooms, staff members, items of equipment or to a dispensary stock line.
- **Auto-Apply** – configure the rota to re-apply itself automatically. If a rota template has been set up to automatically apply, it means that instead of administration staff having to manually apply the rota every few weeks, the rota will re-apply itself according to the settings you have chosen.
  - For regularly run clinics, it is often best to set a template to auto-apply, so that you do not have to manually apply it every time you want it to run. To do this, use the auto-apply tab and follow the options.
  - Note that clinics will not be created on bank holidays or days when the clinician has been listed as being on leave. You will be informed of the application of the rotas via an automatic task, which is sent each week.

Within the **Rota Design** tab:

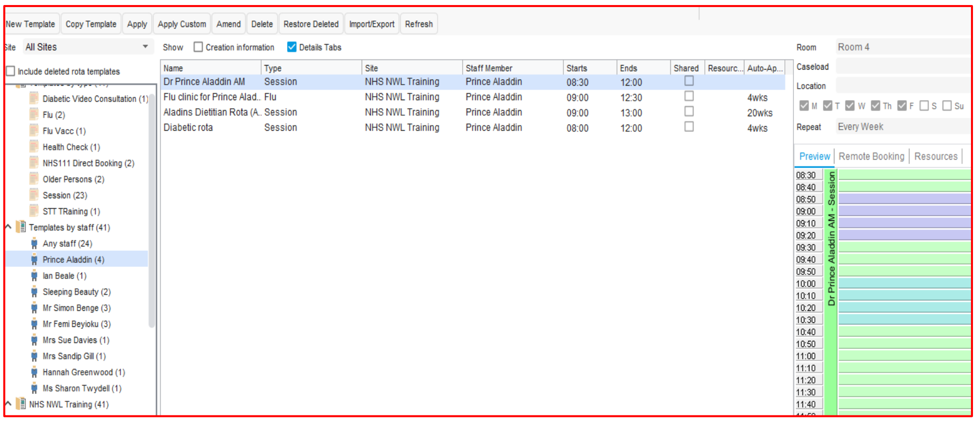
1. Select either a particular member of staff or “All Staff” from the **Staff** field.
2. Select the rota site and room from the drop-down lists, if applicable. To view or manage the list of existing rooms, click **Configure**.
3. Select the appropriate entry from the **Caseload** drop-down list if you want to link the rota template to a particular caseload.
4. Select the appropriate rota type. IF the rota type you want is not available from the **Type** drop-down list, click **New** next to this field to create your own rota type. To view or manage the list of existing rota types, click **Configure**.
5. Type a **Name** for the rota, for example “Asthma clinic (Friday AM)” and select the **Location Type** from the drop-down list. If the location type you want is not displayed, choose ‘Select Another Option’ from the foot of the drop-down list.

6. Type in the rota **Start time** (the end time is calculated automatically by SystmOne, depending on the number of appointment slots you add to the rota).
7. Select the days of the week when you want to use the rota and select the rota frequency from the drop-down list.
8. Select the **Can be auto-extended** tick box if you want the flexibility of being able to add appointments to the start or end of the rota when necessary.
9. Click the **Add** toolbar button to specify the appointment slots this rota contains. The New Slot(s) dialog is displayed.
10. Select the type of slot you want to add to your rota.
11. Type in the quantity of slots you want to add and specify their duration, if you do not want to use the default duration value.
12. Click **OK** to return to the Create Rota Template dialog.



A preview of your rota is displayed down the right-hand side of the Create Rota Template dialog. If you hover the mouse over the following areas, a tooltip is displayed:

- **Rota spine** – rota details are displayed.
- **Appointment slots** – details of the slot type are displayed, for example telephone, embargoed, blocked.



Copying a Template

To copy a template select **Setup** – **Appointments** – **Rota Templates** from the Main Menu.

1. In the **Rota Templates** screen, you will see a list of existing templates.
2. Select the rota template you wish to copy.
3. Right click on the template and select **Copy Template** (or use the Template menu at the top to select **Copy Template**).
4. The **Create Rota Template** dialog box will appear.
5. **Amend details** as required e.g. Staff, Room, Type, Name, etc.
6. Click **OK**.

Amending Rota Templates

To amend a template select **Setup** – **Appointments** – **Rota Templates** from the Main Menu.

1. In the **Rota Templates** screen, you will see a list of existing templates.
2. Select the template you wish to amend.
3. Right click on the template and select **Amend** (or use the Template menu at the top to select **Amend**).
4. The **Create Rota Template** dialog box will appear.
5. Amend details as required, e.g. merge, split, add, delete slots and change slot types or changing a consultation room.
6. Click **OK**.

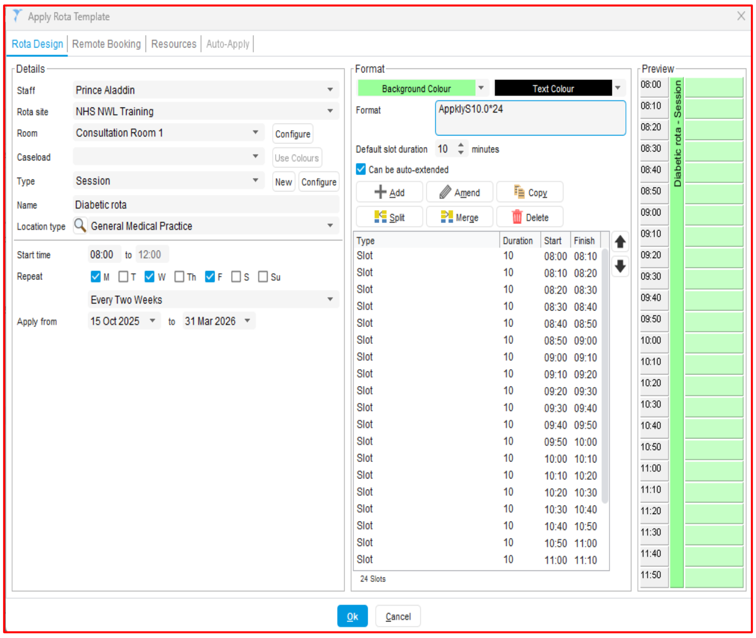
Deleting Rota Templates

To delete a template select **Setup** – **Appointments** – **Rota Templates** from the Main Menu.

1. In the **Rota Templates** screen, you will see a list of existing templates.
2. Select the template you wish to delete.
3. Right click on the template and select **Delete** (or use the Template menu at the top to select **Delete**).
4. The **Question** dialog box will appear, asking “Are you sure you want to delete this rota template?”
5. Select **Yes** and the template will be deleted.

Applying Rotas

To apply a rota select **Setup** – **Appointments** – **Rota Templates** from the Main Menu.



1. In the **Rota Templates** screen, you will see a list of existing templates.
2. Select the template you wish to apply.
3. Right click on the template and select **Apply** (or use the Template menu at the top to select **Apply**).
4. The **Apply Rota Template** dialog box will appear.
5. Check/amend the details shown in the upper half of the Apply Rota Template dialog.
6. Check/amend the start time.

7. Select the tick boxes to specify the number of days of the week when the template will apply and select the appropriate option from the **Repeat** drop down list to specify how often the template will apply (for example Every Week, 1st Week in Every Month).
8. Specify a start and end date. **Note:** You can only apply a rota for up to a year.
9. Click **OK**.

If your rota has not been applied successfully or it is affected by any public holidays or closed days, a message is displayed to alert you.
If your rota conflicts with an existing rota, read the message carefully and click one of the following:

- **Continue application** – the rota will be applied to all dates except dates with a conflicting rota.
- **Cancel application** – the rota application is cancelled.

If you try to apply a rota on closed days or public holidays, read the warning message to see which dates are affected and click one of the following:

- **Create on holidays** – the rota is applied to all the selected dates, including closed days and public days.
- **Skip holidays** – the rota is applied to all dates except close days and public holidays.
- **Cancel application** – the rota application is cancelled.

Creating Waiting Lists

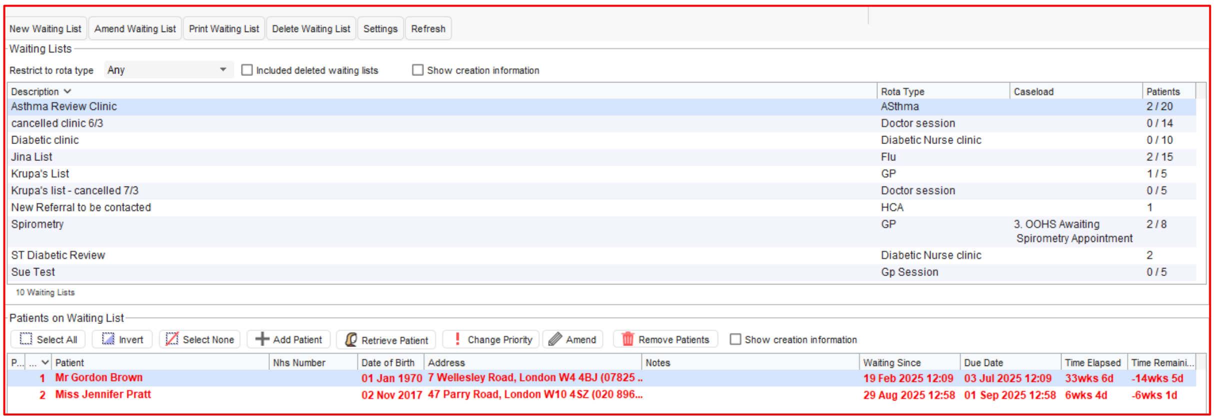
You can maintain as many different patient waiting lists as you need and you can use them to book appointments either locally or using remote bookings.

To go to the Waiting List screen, select **Appointments** – **Waiting Lists** from the Main Menu.

Using the Waiting Lists Screen

The Waiting List screen is split horizontally into two panes:

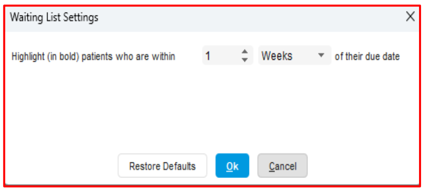
- **Top Pane** – displays the available waiting lists and shows the rota type associated with each list, the number of patients currently in each list and the maximum number of patients allowed (if applicable).
- **Lower Pane** – displays a list of patients in the selected waiting list. The list is ordered in terms of priority and each patient is numbered to show their current position on the list. **Note:** If patients have the same priority and have been waiting the same length of time, they will share the same position, e.g. joint third.



The patients in the upper pane are sorted by description and the patients in the lower pane are sorted by position. To sort the waiting lists in a different way, click on the appropriate column heading.

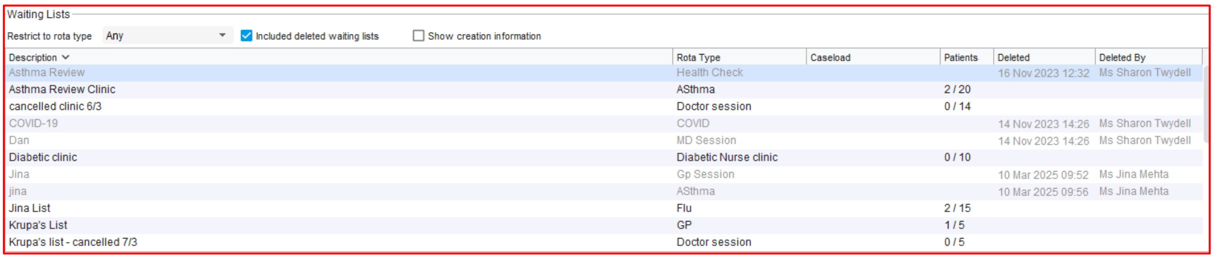
The following colour coding is used on the Waiting Lists screen:

- **Bold** – due date approaching. Click **Settings** at the top of the Waiting Lists screen to specify when a due date will be highlighted in bold type.



- **Red** – due date has passed.
- **Grey** – deleted waiting list.

To include deleted waiting lists, select Include deleted waiting lists. Deleted lists are displayed in **grey** type with the date they were deleted and the name of the user who deleted them.



Description	Rota Type	Caseload	Patients	Deleted	Deleted By
Asthma Review	Health Check			16 Nov 2023 12:32	Ms Sharon Twydell
Asthma Review Clinic	ASthma		2 / 20		
cancelled clinic 6/3	Doctor session		0 / 14		
COVID-19	COVID			14 Nov 2023 14:26	Ms Sharon Twydell
Dan	MD Session			14 Nov 2023 14:26	Ms Sharon Twydell
Diabetic clinic	Diabetic Nurse clinic		0 / 10		
Jina	Gp Session			10 Mar 2025 09:52	Ms Jina Mehta
jina	ASthma			10 Mar 2025 09:56	Ms Jina Mehta
Jina List	Flu		2 / 15		
Krupa's List	GP		1 / 5		
Krupa's list - cancelled 7/3	Doctor session		0 / 5		

The following options are available from the Upper Pane of the Waiting Lists screen:

Option	Description
New Waiting List	Create a new list.
Amend Waiting List	Amend the currently selected waiting list.
Print Waiting List	Print the currently selected waiting list.
Delete Waiting List	Delete the currently selected waiting list.
Settings	Specify when an entry nearing its due date will be shown in bold type on the Waiting List screen.
Refresh	Update the Waiting List screen with the latest changes. **Note:** If you have clicked on a column heading to sort the information displayed, the table will revert to its default order when you click **Refresh**.
Restrict to rota type	Filter the list displayed by rota type (each waiting list is associated with a rota type when created).
Include deleted waiting lists	Include deleted entries in the list displayed. Deleted waiting lists are displayed in **grey** text.
Show creation information	Show when each waiting list was created and who created it.

The following options are available from the Lower Pane of the Waiting Lists screen:

Option	Description
Select All	Select all of the patients displayed.
Invert	Deselect all selected patients and vice-versa.
Select None	Deselect all patients.
Add Patient	Add a patient to the waiting list that is selected from the Upper Pane.
Retrieve Patient	Retrieve the patient record of the currently selected patient.
Change Priority	Change the priority status of the currently selected patient.
Amend	Select from the following options: Amend Notes

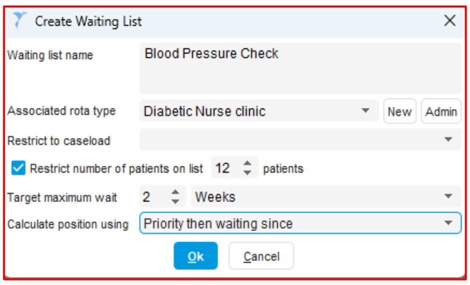
	Amend Waiting Since Amend Due Date Amend Everything Move to Waiting List Copy to Waiting List
Remove Patients	Remove the currently selected patient(s) from the waiting list. When asked if you want to mark this wait as completed or simply delete this patient from the waiting list, click one of the following: • **Completed** – manually mark the wait as "Completed" (normally waits are completed when an appointment is booked for the patient). • **Deleted** – remove patient from the waiting list. • **Cancel** – leave the patient on the waiting list.
Show creation information	Show when each patient was added to the waiting list and who made the addition.

Create a Waiting List

Select **Appointments** – **Waiting Lists** from the Main Menu.

1. Click New Waiting List from the toolbar at the top of the Waiting Lists screen.
2. A Create Waiting List dialog box opens.
3. Type a name for the waiting list and select an associated rota type from the drop down list. If the rota type you want is not available, click **New** to create a new one.
4. Select the appropriate caseload from the drop-down list, if you only want patient from a particular caseload to be added to the waiting list, otherwise leave blank.
5. Click **Restrict number of patients on list** if you want to limit the number of patients the list can hold.
6. Type a value in the **Target maximum** wait field to select **Hours**, **Days** or **Weeks** from the drop down list as appropriate.
   - When a patient is added to the waiting list, the "Due Date" for the patient will be automatically calculated using the target maximum wait you have specified. When adding a patient to the list, however you can change the due date if required.
7. Select the appropriate option from the **Calculate position using** drop-down list to specify how you want a patient's position in the waiting list to be calculated:
   - **Priority then waiting since** (default) – sort according to priority (high, normal, low), then by waiting since date.
   - **Waiting since** – sort by the waiting since date.
   - **Due date** – sort according to the due date.
   - **Date added** – sort according to when they were added to the waiting list.
8. Click **OK**.

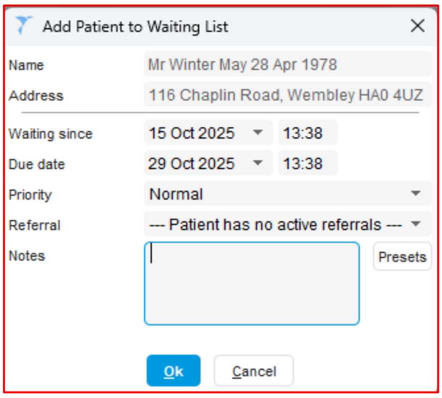
The Waiting List description is shown in the top half of the Waiting Lists screen.



Adding a Patient to a Waiting List

1. Click **Add Patient** above the lower pane.
2. Search for the patient you want to add using the Waiting List Patient List Search dialog box and click **OK**.
3. The **Add Patient to Waiting List** dialog is displayed.
4. Check/amend the dates/times shown in the Waiting since and Due date fields.
5. Specify the patient's priority status and any notes if required.
6. Click OK.

The patient is displayed in the lower part of the Waiting Lists screen.



Appointment Settings

To access the Appointment Settings, select **Appointments** – **Appointment Settings** from the Main Menu.

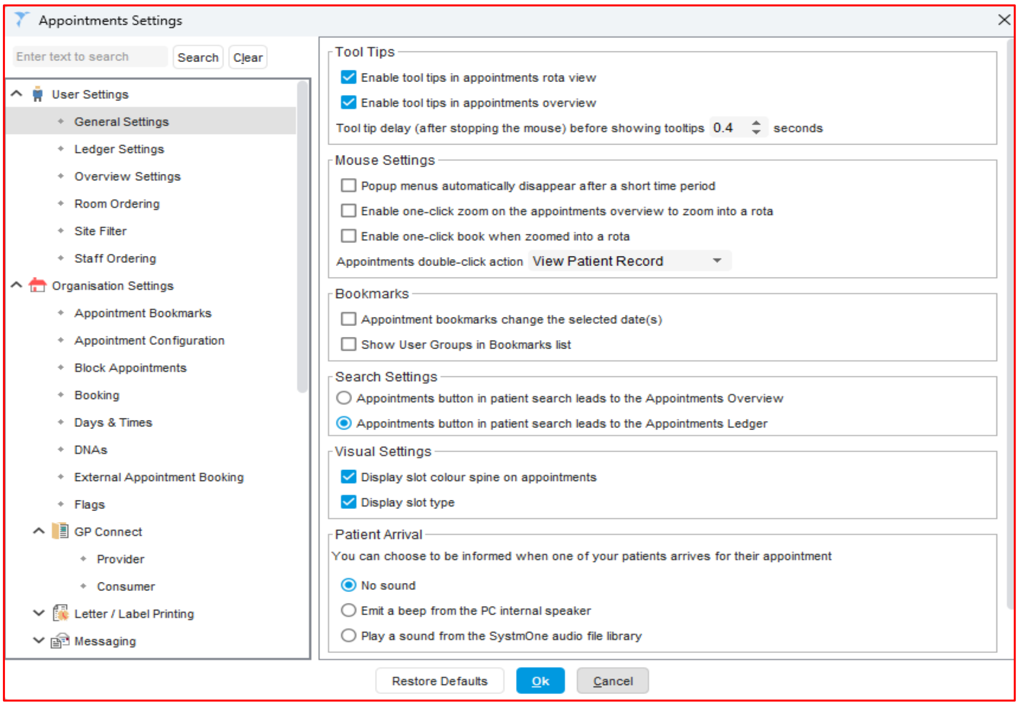
The following nodes may be available from the User Preferences tree:

- **Tooltips** – whether or not tooltips are displayed on the Appointments Overview and/or Appointments Rota View ("Zoomed in" view) and how long you want to wait before the tooltip is shown (after you stop moving your mouse).
- **Mouse Settings** – whether you want pop-up menus to disappear within a short period; when you want to use one click instead of double click; what do you want to happen when you double-click on a booked appointment.
- **Bookmarks** – if you select the Appointment bookmarks change the selected date(s) option, it means when you click a bookmark, the staff, site and date in the calendar that were selected when the bookmark was set are displayed. If you do not select this option, only the staff and site that were selected at the time the bookmark was set are displayed and you are not taken to the associated date in the calendar.
- **Search Settings** – whether you want to go to the Appointments Overview or the Appointments Ledger when you click **Appointment** on the Quick Patient Search dialog or the Patient Locator.
- **Visual Settings** - whether you want to be able to see the colour of the underlying slots when viewing a rota that contains booked appointments and/or whether you want the slot type name to be displayed on empty slots on the Rota View/Appointment Ledger.

You can also specify your sound settings for patient arrival:

- **No sound** – default setting.
- **Emit a beep from the PC internal speaker** – if it does not seem to work, ensure that the system volume has not been muted in Windows.

- **Play a sound from the SystmOne audio library** – to play a sound file, a PC needs a sound card and speakers.



Appointment Templates

If you often need to make the same selections from the **Book New Appointment** dialog, as you are booking the same type of appointment for multiple patients, you can set up an appointment template to make the booking process quicker.

Note: Only users with the "Appointments Administrator" access rights can create, amend, delete, import or export appointment templates.

To create an appointment template, select **Setup** – **Appointments** – **Appointment Templates** from the Main Menu.

1. Click **New Template** from the toolbar the top of the Appointment Templates screen.
2. Type a **Template name** and select an appropriate **Icon** from the drop down list.
3. Select a **Category** for the template from the drop down list, if the category is not there, you can click **New** to create a new category.
4. Specify the **appointment duration**, if required.
5. Type any appropriate **text** in the Details field.
6. Select any appropriate **Flags**.
7. Type any appropriate text in the **Staff reminder** field, e.g. "Inform patient that they should not drive after their appointment" (this text is displayed in the form of a pop-up message when you apply the template.
8. Take the following action if you want the patient to be offered an information leaflet at the time of booking:
    - Open the web browser, e.g. Google Chrome.
    - Go to the website that offered the relevant information leaflet and navigate to the leaflet you require.
    - Copy the URL from the **Address** field on your browser and paste into the **Patient leaflet URL** field.

- Click Test to check that the URL displays the correct information.

9. Click **OK** to save the template.