Rota and Appointments Configuration

Closed Days and Staff Leave

Add Closed Days	Closed days can be recorded so that rota sessions are not automatically set up
	
	Select **EMIS Button > Appointments > Holidays and Closures**
	• Existing full closed days are displayed in red and part days in orange
	  ◦ **Select date** or ***consecutive* dates** on the calender (hold SHIFT)
	  ◦ Click **Book**
	  ◦ If **All day** is ticked the times cannot be altered
	  ◦ Enter **notes** to indicate reason for closure.
	  ◦ Click **Book**
	  ◦ If there are **conflicts** with existing rotas you will need to confirm whether to **keep** or **delete** the rotas or **cancel** the closure booking
	• Closed days show in Appointment Book if Show Holidays is active (only when date is clicked on and staff / session selected in picker)

Add Staff Leave	Leave or non-working days can be recorded for any staff but is primarily used for those who hold rotas.
	
	Select **EMIS Button > Appointments > Holidays and Closures**
	  ◦ Click **Holder Unavailability** (optionally click **Overlay Closures** to view both when session holder selected)
	  ◦ Choose the **session holder** from the drop down (or search)
	  ◦ **Existing leave** full days are displayed in **green** and half days in **light green**
	  ◦ **Select date** or ***consecutive* dates** on the calender (hold SHIFT)
	  ◦ Click **Book**
	  ◦ If **All day** is ticked the times cannot be altered
	  ◦ Enter **notes** to indicate reason for closure.
	  ◦ Click **Book**
	• Leave shows in Appointment Book if Show Holidays is active (only when date is clicked on and session holder filter contains staff with leave booked)

Cancel Leave / Closures	Select **EMIS Button > Appointments > Holidays and Closures** • Click **Holder Unavailability** and click **Overlay Closures** to view both • **Highlight** date and click **Cancel** • Type **reason** • Click **Confirm**

Template Background Setup

Create Embargo Types	Locally defined embargoes can be created
	
	Select **EMIS Button > Appointments > Appts Config Wheel**
	
	• **Organisation Options**
	    • Select **Embargo Types**
	    • **Click Add (or Edit existing)**
	    • **Day(s) before –** Number of days before the appointment that you want it to be bookable e.g. 0 days for on the day
	    • **Specific Time –** Set time > Embargo always expires at set time
	    • **Relative time** - To set the embargo to end at a time ***relative*** to the appointment time (e.g. two hours before the appointment time). Type the required number of minutes / hours
	    • Use *either*
	        • **slot colour** when embargoed
	        • **specific colour** when embargoed (and choose foreground (text) and background colours as required)

Create Slot Types	Locally defined slots can be created
	
	Select **EMIS Button > Appointments > Appts Config**
	
	    • Select **Slot Types**
	    • **Click Add (or Edit existing)**
	    • **Name –** Short name of slot – displayed when setting up the rota
	    • **Bookable –** Tick if slot is to be used for booking patients
	    • Choose **Status Type** from **Appointments**, **Telephone** or **Visits**
	    • **Embargo Type** – Choose from list configured in Embargo Types in section above (or leave blank)
	    • **Set colours >** choose foreground (text) and background colours as required
	    • **Slot alert** text. **Note**: Slot alerts are displayed in the Additional Information section of the Book Slot screen (with patient warnings)
	    • **Allow Auto DNA –** tick if appropriate for slot type
	    • **Send SMS –** tick if appropriate for slot type
	    • **Icon –** choose an appropriate icon or leave blank

Session Categories	The Session Categories section enables you to create pre-defined patient list and non-clinical session types, which you can select when you create an appointment session. Select **EMIS Button > Appointments > Appts Config** • Select **Session Categories** • **Click Add (or Edit existing)** • Name – Add an appropriate name e.g. GP Surgery AM

	• **Associate** with
	  • **List** – List sessions that *do not have* a fixed start or end time, and untimed appointment slots can be allocated to different session holders
	  • **Non List** –
	    • **Timed** - sessions divided into several appointment slots with a defined duration.
	    • **Untimed** - sessions that start and end at particular times, but the appointment slots are not timed and the patients are allocated sequentially. Untimed sessions can display numbered slots on the Appointment Book.
	    • **Non-clinical sessions** - sessions that start and end at particular times, but are not divided into appointment slots.

Rota Template Session Setup

EMIS uses session templates which can be combined to create a 'week template'. Week templates can then be applied using the planner screen The order to set these up is Session templates first, then a week template from several session templates	

Create a New Session Template	**Note –** A clinician needs the **Appointment Session Holder** option set to Yes in **Edit User** to have a rota assigned to them.
	
	Select **EMIS Button > Appointments > Week Templates**
	
	• Click **New Session Template**
	• **Session Name** – The name of the session – can be generic if applicable to multiple staff e.g. GP AM or can be specific if applied to individual
	• **Session Type** :
	  • **Timed** - sessions divided into several appointment slots with a defined duration. *Regular rota*
	  • **Untimed** - sessions which start and end at particular times, but the appointment slots are not timed and the patients are allocated sequentially. Untimed sessions can display numbered slots on the Appointment Book. *Sit and wait session*
	  • **List** – List sessions that *do not have* a fixed start or end time, and untimed appointment slots can be allocated to different session holders *Triage list*
	  • **Non-clinical sessions** - sessions that start and end at particular times, but are not divided into appointment slots. *Meeting*
	• **Start Date** – enter a **date** to begin the rota from and the **times** of the rota (list rotas can have **all day** set to not specify times)
	• **Slot Duration** (for Timed sessions only) Choose the default **slot time**

	• **Slot Count** (for Untimed and List sessions only) Choose the **number** of slots and if to display **slot numbers** of not
	• **Session Category** (will alter dependent on type chosen above) – Choose a category e.g. GP AM
	• **Default Slot Type** – Use for List sessions only – Creates the rota based on the slot type here and number of slots
	• **Hide from Patient Access >** Tick to not allow the rota to be seen for online booking
	• **All Slots Patient Access Bookable –** click to quickly allow all slots to be booked online
	• **Notes –** Shows in the rota header
	• **Location –** Set the location for the rota (if using branch)
	• **Service** – Add the service if appropriate (not for GP)
	• **Recurrence pattern** –
	    • **None –** A one of off rota
	    • **Daily –** Set the daily recurrence for example every weekday or every 2nd day
	    • **Weekly* -** Set the days of the week the rota is applicable to and the weekly recurrence e.g. every week or fortnight
	    • **Monthly –** Set the monthly recurrence (useful for monthly non clinical rotas)
	• **Range of recurrence**
	    • **No End Date –** Continue to apply indefinitely up to 52 weeks
	    • **End after –** Set number of occurrences
	    • **End by –** Choose a date in the future e.g. when a registrar leaves
	• **Action on conflicting session** – If a session has recurrence set and no end date it may conflict with items already created e.g. holidays. Set what action the rota should take
	    • **Do not create**
	    • **Create and keep existing sessions** (may create double bookings)
	    • **Create and delete existing** sessions (if no appts booked)
	
	• **Session Holders – Advise to leave blank if creating a generic template**
	    • **Click** the **double drop** down arrow to view / add / remove session holders
	    • **Click Add**
	    • **Search** for the session holder / s and double click to add (note that multiple holders can be quick added by double clicking a folder e.g. GP folder)
	
	• **Edit the slots** (optional)
	    • If the rota has been completed as above you will now see some slots in the right pane (session preview) – these can be edited individually or in bulk
	    • **Highlight** the slot / s to be edited
	    • Right click and :

	• **Merge** to join slots together
	• **Delete** to remove from rota (may leave gaps)
	• **Slot Properties:**
	  ◦ **Slot type –** alter type of slot e.g. add telephone slots
	  ◦ **Embargo –** Add or remove embargoes
	  ◦ **Notes** – Add slot notes (shows on hover for booking info)
	  ◦ **Patient Access Bookable**
	  ◦ **Blocked** – make slot blocked
	  ◦ **Urgent** - make slot urgent
	
	Click **Save as Template – enter a name for the template e.g. GP generic AM**
	
	Click Close

Edit a session	• Click **New Session Template** • Click **Load From Template** • Choose **template** • Make **amendments** • Click **Save Template** (**Note:** *save as* to create copy)
Preview and Delete Session	• Highlight a session in the session templates area (bottom left) • Click **Preview** to view the rota in full • Click **Delete** to remove it from the session library

Apply Sessions (in Appointment Book)

Apply Sessions	If week templates are not to be used sessions can be applied directly from the appointment book and will continue to apply if recurrence is set. Select EMIS Button > Appointments • Click **Create Session** • Click **Load from Template** • Choose **session to apply** • Make any required amendments e.g. **Slots / Name / Recurrence** • Add a session holder (if not setup in rota header) • Click **Create** to apply the rotas

Week Template setup

Create a New Week Template	A week template can be quickly applied to a clinician in the planner

	Select **EMIS Button > Appointments > Week Templates**
	
	• A grid shows with day columns and time rows- the grid is shaded darker grey to show closed times (set in Appointment config)
	• Week Templates will display the name of the template you are currently viewing and any notes
	• **Open Week Template** to view and edit a different one
	• From the session templates section **drag and drop** the rotas sessions to the grid on the days required – the session will automatically move to the correct place based on time set when session setup
	• The **session** will change colour (whilst you drag over the grid) to indicate the following
	    • **Red** – Trying to drag a template over the top of an existing session on the grid
	    • **Green** – Free session (nothing in grid) Ok to apply
	    • **Orange** – You are trying to apply to a closed day (can still apply)
	• Use the **red X** on each session to **remove** from template
	• Continue to drag rotas until the pattern for the week is complete
	• Click **Save Week Template**
	• Give a descriptive **name** e.g. Dr Smith Week 2 and **notes** to aid in planning
	
	To **edit** a template
	
	• Click **Open Week Template**
	• **Choose** the template to be edited
	• Continue as above to make changes
	• Click **Save Week Template** (EMIS will prompt if you attempt to move away wthout saving)
	
	NOTE – the **New Week Template** option is now active to start another template from scratch

Planner

View and navigate the planner	A week template can be used in the planner screen to quickly populate clinicians rotas into the future Select **EMIS Button** > **Appointments** > **Planner** • A **grid** shows with **week** columns and **clinician** rows – the clinician rows are determined by the staff filters chosen (quick picks) • Past weeks show in grey and future in white • **Existing sessions** will show in blue if clinician has already applied rotas • Double click to view and cancel existing session (only those with no appts booked) also different session templates can be added • Use the **green arrows** to navigate forward or backward a week at a time
Add a week template	• Make sure that the **clinician** the rota is to be applied to is **visible** (staff filter) • **Drag and drop** the required week template to the planner (use the red x to remove) • To **preview** the template highlight it and click Preview (not preview template) • **Continue** to add the templates as required to all **clinicians** • (Note the option to copy week forward to quick add the same template to the same clinician with one click)
Edit a week template	• Once a week template has been added it can be edited for that instance only (i.e. the week template remains as is) • **Highlight** the template in the planner (turns green) • Click the **Edit** icon (pencil) • **Edit** as per creating a week template in **lesson 4** • Click **Apply** to put the rotas into the book or click Ok to save changes and apply later

Apply templates	• Templates added to the planner will not appear in the Appointment Book until applied
	• The **rotas** to be applied need to be **selected** on the **planner** screen
	• Rotas can be selected :
	    • **Individually** – click the rota (will turn green)
	    • **Multiple** – use CTRL to multi select while clicking
	    • **Week** – Use the blue select week link on the column header for all rotas for all clinicians for a week
	    • **All** – Use the select all option in the ribbon
	
	Note the option to deselect all too

	• Click **Apply** and deal with any conflicts
Add Recurring Templates	• If a week template remains consistent EMIS can auto apply it up to 52 weeks in the future • Click **Add Recurring Template** • Choose **week template** to apply (one at a time) • Choose **session holder/s** for session to be applied to • Add **date** to begin applying from • Add **Recurring weeks** (weekly , fortnightly) • Choose **when to end** recurrence (no end date for 52 weeks) • Select action for conflicts • Click **Create**
Manage Recurring Session Templates	Session templates are recurring templates added directly from the appointment book • Click **Manage Recurring Templates** • Click the **Session Templates** tab • **Find** the recurring **template** to remove Click **Cancel**

Cancelling Applied Rotas

Cancel a rota *with no* booked appointments	• Select **EMIS Button** > **Appointments**
	    • Find the **rota** to be **cancelled**
	    • Right click header and choose **Cancel / Reassign** session
	    • **Confirm** cancellation
	    • If the rota was applied as part of a *recurring pattern* EMIS will prompt to delete future sessions – tick if these are to be deleted
	    • Set the **date** up to which the rotas are to be deleted *if you don't wish to delete all rotas*

Cancel a rota *with* booked appointments	• Select **EMIS Button** > **Appointments**
	• Find the **rota** to be **cancelled**
	• Right click header and choose **Cancel / Reassign** session
	• A window appears showing a **list of patients** booked into the rota
	• Choose either
	    • **Assign another session holder** – choose session holder using search or drop list
	    • **Cancel session and move patients to reallocation list**
	    • **Cancel and lose booked appointments**

	• If the rota was applied as part of a *recurring pattern* EMIS will prompt to delete future sessions – tick if these are to be deleted • Set the **date** up to which the rotas are to be deleted *if you don't wish to delete all rotas*

Amending Applied Rotas

Amend a rota	• Select **EMIS Button** > **Appointments**
	• Find the rota to be **amended**
	• **Right click** and select **session properties** and optionally amend
	    • **Session Name**
	    • **Location** (if multiple locations exist)
	    • **Add** a service
	    • **Add / Amend Notes** (might be useful to mark ON CALL)
	    • **Session Category**
	    • **LED Alias (**see LED Alias setup) (useful if rota has moved room)
	    • **Hide from Patient Access and Diary** (not sure what diary is)
	    • **Update Session Times - either**
	        • **Move Session earlier by xx minutes / hours / days**
	        • **Custom – add start and end times and date**
	    • **Change session holder / s**
	        • **Use the red x to delete current holder**
	        • **Use magnifier to add new holder / s**
	If any **appointments** exist within the rota they will *remain* at the same time regardless of the rota being moved time wise. If the amendments would move the appointment outside the rota time this will not be allowed.
	
	NOTE: The history tab will show detail of rota creation and amendment

Organisation Appointment Setup

Appointment Settings
Organisation options
	• Select **EMIS Button** > **Appointments**
	    • Click **Appts Config**
	
	• **General**
	    • **Maximum slots to create Use for list and untimed sessions – Untimed / List sessions only -** maximum number that can be added when creating (0 is unlimited)

- **Minutes to calculate default slot height –** Used for setting how merged slots displayed. (unlikely to alter)

- **DNA Management**
  - **Enable automatic DNA** (uses default DNA reason – remember slots can be opted out of auto dna)
    - Set the amount of **time** *after* the appointment that the rota should mark as DNA in minutes
    - **Patient alerts** -set how many times must DNA within a given day / week / month / year before they get an alert
    - **DNA Reasons** – Add or amend the reasons available if manually marking as DNA
      - **Set default on the option you wish to use on auto DNA**
- **Reasons**
  - **Booking Reasons** (use to create a list of free text appointment types and duration e.g. Asthma Review for 30 minutes)
    - **Add / Edit or Delete** Booking Reasons as required
  - **Cancellation Reasons** (use to create a list of free text cancellation types

- **Session Holder Filters**
  - **Two** types of filter can be created either **a staff filter** or a session **type filter**
  - These filters will become available to users to add to their filter options

- **Opening Times**
  - Choose to specify opening times or not by ticking
  - **Amend** opening times per day – use the **+** to add multiple times to a day e.g. Morning 9:00 – 12:00 and PM 15:00 to 19:00
  - **Tick** to close a day off completely

- **LED Screens – Adding New** (should be done by techie but we will need to know how to add messages etc.)
  - Click **Add** to add a new screen
    - **Description** – name of the LED screen (e.g. Main reception)
    - **Service Identifier (techie)** The PC the LED screen is attached to has a service running to create a service identifier – this needs to be entered here.
    - **Hang Time –** Time messages are displayed for
    - **Queue Time –** Time that patient is displayed for ????
    - **Beep –** Choose whether the screen beeps or not when patient is called

	• **Computers using this LED screen**
	  • Click **Add**
	  • **Description** (e.g. Dr Brown)
	  • **Computer Name –** PC Name **(windows name??)**
	
	• **Adding / Amending Messages**
	  • **Messages of the Day tab**
	  • **Add Description** (e.g. prescription message)
	  • **Choose one** line or **two** line **message**
	  • Add **Message** text as appropriate (30 characters including spaces per line only)
	  • **Status** – Active or Inactive
	  • **Message Display** – choose how the messages appear and speed of transition
	** Use **send settings to LED screen** to update changes **
	
	• **Session Holder LED Alias** – allows an alternative name (alias) to be sent to the LED board so e.g. Dr John Smith could be Dr Smith – might be useful for clinicians with very long names
	• ***This is overwritten if using Location Alias in Terminal Options***
	
	• **Organisation Templates –** Use to set letter options that can be sent for booking and cancellations
	  • **Booking Template –** used drop list or search for appropriate booking letter
	  • **Cancellation Template –** used drop list or search for appropriate cancellation letter
	
	• **Session Location Filters –** Create filters to use on Appointment Book > Location Filters dropdown
	
	• **Session Header Colours -** Headers can be coloured by location (for branch sites)or session type (as above Timed, untimed etc.)
	  • ***Set colour by Location***
	  • Check the radio dot is in Location
	  • Click Add (or Edit existing)
	  • Choose the location to colour from the drop list
	  • Choose foreground (text) and background colours as required
	  • ***Set colour by Session Type***
	  • Check the radio dot is in Session Type
	  • Choose type to edit
	  • Click Edit
	  • Choose foreground (text) and background colours as required

	NOTE option to restore to EMIS defaults

Terminal PC Settings

Terminal Settings
 	
Specific to the PC and do not follow the user
	• Select **EMIS Button** > **Appointments**
	• Click **Appts Config**
	• **Location LED Alias**
	    • **Do not use Location Alias** – will use either i or *session holder LED alias* if configured
	    • **Use Location Alias** – Enter alias e.g. Dr Smith Room 6 or Room 6
	• **Send in Notifications –** Use to **notify** that ***terminal*** *(not user**)*** that a clinician has pressed **send in patient**.
	    • Can appear as **green alert bar** or **pop up message box**. Generally used if no LED available – contains Patient and Clinician name