

# Bulk Registration and Appointment Booking URLs – User Guide

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## Document History

Version	Date	Description
0.1	08/02/2021	Draft Created
1.0	19/02/2021	Document Finalised
1.01	24/02/2021	New screenshots of website layout on mobile phone
1.02	25/02/2021	Added FAQ Section
1.03	25/02/2021	General Improvements

## Introduction

This document will describe two SystemOne capabilities:

- Bulk patient registration from a csv file
- Sending URLs to patient to book appointments through a website

During the COVID-19 pandemic, there has emerged a need to establish new ways of working that will speed up delivery of vaccinations across a large proportion of the population. SystemOne is a well-established system and has provided functionality to support vaccination clinics for many years. However, the scale of the COVID-19 vaccination roll out presented opportunities to make improvements to our existing capabilities. This document outlines new functionality that will allow users to speed up the scheduling and delivery of vaccinations to large population cohorts.

## Patient Cohorts and Bulk Registration

### *Bulk registration of patients*

You can bulk register patients by importing a .csv file containing the details of the patients that you wish to register. This means that you can much more easily register many patients who require a vaccination in a single action, negating the need to register thousands of patients individually.

You will need to communicate with whoever is responsible for generating your patient cohorts (e.g. the GP practices in your area) and ask them to generate a .csv file containing the following information (First name, Surname, NHS Number, Date of Birth, Telephone number, Email Address).

Note - Patients only need to have either a phone number or an email address to import correctly, as long as the column headers are correct.

	A	B	C	D	E	F
1	First Name	Surname	DOB	NHS Number	Phone Number	Email Address
2	Michael	Smith	24/10/1976	9001359329	07884441254	<a href="mailto:michaelsmith@testmail.com">michaelsmith@testmail.com</a>
3	Daniella	Griffiths	25/09/1986	9664449997	07445124558	
4	Kevin	Jones	08/12/1958	9001359310		<a href="mailto:Kevin.Jones@testmail.com">Kevin.Jones@testmail.com</a>

Fig 1. Example showing the appropriate format of a .csv file

Once you have your list(s) of patients, you are ready to import them into SystemOne.

Navigate to **Setup > Bulk Operations > Bulk Import Patients** (Note that currently access to this screen is controlled by TPP, you will need to contact the helpdesk if you are running a vaccination clinic and need access to this feature.)

Only staff members who have both of the following access rights can perform these actions:

These instructions are correct at the date of writing. For further assistance, consult the SystemOne Online Help.

- Register Patients
- System Administrator

Press the “Import from CSV” button at the top of the screen and select your file. SystemOne will read the data on the file, and then display a preview of the patient list.

If you are struggling to import the list, some things to try are:

- Make sure the text in the column headers is identical to the screenshot below. This includes capitalisation, as the column headers are case sensitive.
- The DOB format is the same as the example below (i.e. DD/MM/YYYY)
- Check saving the spreadsheet as a csv file has not altered any of the data.

Note that you can only import a maximum of 1000 patients on this screen. If your list is longer than this, you will need to split it into multiple csv files before it can be imported.

First Name	Surname	DOB	NHS Number	Phone Number	Email Address
Daniella	Griffiths	25/09/1986	9664449997	07445124558	
Kevin	Jones	08/12/1958	9001359310		Kevin.Jones@testmail.com
Michael	Smith	24/10/1976	9001359329	07884441254	michaelsmith@testmail.com

Fig 2. Preview of patient list imported from the csv file

Additionally, the system will display a report of the rows that failed to import from the spreadsheet along with a reason why they failed. You can use the row number to identify and fix the problems.

**The following rows will not be imported:**  
Row 2: Invalid NHS number  
Row 3: No first name  
Row 4: First name too long  
Row 5: No surname  
Row 6: Surname too long  
Row 7: No date of birth  
Row 8: Invalid date of birth

Fig 3. Patients that cannot import from the spreadsheet

Once you have corrected any errors, you can re-import the spreadsheet and then register the patients. If any rows still fail to import, you can choose to register just the patients in the rows that been successful, and then take steps to manually register or contact the remaining patients to book them an appointment.

Click on the “Bulk Register Patient” button to register all the patients. At the end of the process, you are presented with the details of what happened with each patient.

These instructions are correct at the date of writing. For further assistance, consult the SystemOne Online Help.

First Name	Surname	DOB	NHS Number	Phone Number	Email Address	Outcome
Daniella	Griffiths	25/09/1986	9664449997	07445124558		Patient registered successfully
Kevin	Jones	08/12/1958	9001359310		Kevin.Jones@testmail.com	Patient registered successfully
Michael	Smith	24/10/1976	9001359329	07884441254	michaelsmith@testmail.com	Patient registered successfully

Fig 4. List of registered patients

Registering patients using this tool will generate a new type of temporary registration. This will last for 6 months, after which the registration will end and the patient will be deducted automatically.

## Scheduling bulk appointments

### Setting up appointment invitation types

In order to publish appointments to the appointment booking website and send invitations to patients, you will need to configure a list of available Appointment Invitation Types that you wish to use.

The invitation type will allow you to determine which patients can book into which appointment slots. For example, you may wish to run different rotas for your COVID-19 1<sup>st</sup> vaccinations and your COVID-19 2<sup>nd</sup> vaccinations, which you can do by setting up two different invites.

Appointment Invitation Types are configured list options. For full details on how to set up and use configured lists, you should refer to the appropriate section of the SystemOne Online Help by pressing the F1 key while in SystemOne.

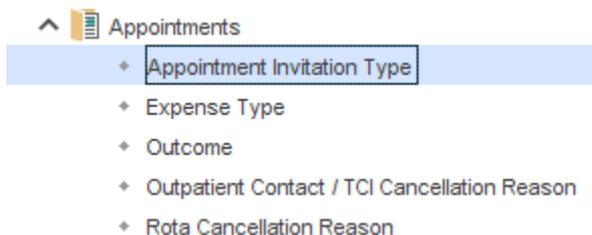


Fig 5. The Appointment Invitation Type configured list

On the configured list screen, navigate to “Appointments” > “Appointment Invitation Type” and press the New Option button to create appropriate configured list options that you wish to use.

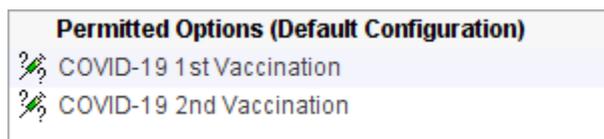


Fig 6. Example Invitation Types

Note that the above invitation types are just examples, and you should consider how you want to configure your appointments and invitations to suit the services you are providing.

These instructions are correct at the date of writing. For further assistance, consult the SystemOne Online Help.

### **Publishing appointments to the appointment booking website**

To allow patients to book appointments online, you will need to determine which rotas and/or slots you wish to make available via the appointment booking website.

To do this, go to “Organisation Preferences” > “Appointments” > “Patient Appointment Invitation”.

You can use the top two options to specify which slot types and/or rota types are available to select from in the bottom table, or allow booking into all of these.

You will need to set up which rota types to link to each of the Invitation Types that were set up as configured list options using the tickboxes. Until this has been done, patients will not be able to book into these rotas.

This gives you greater control over which appointments your patients can book, for example to run separate vaccination clinics for Part 1 and Part 2 of the COVID-19 vaccine.

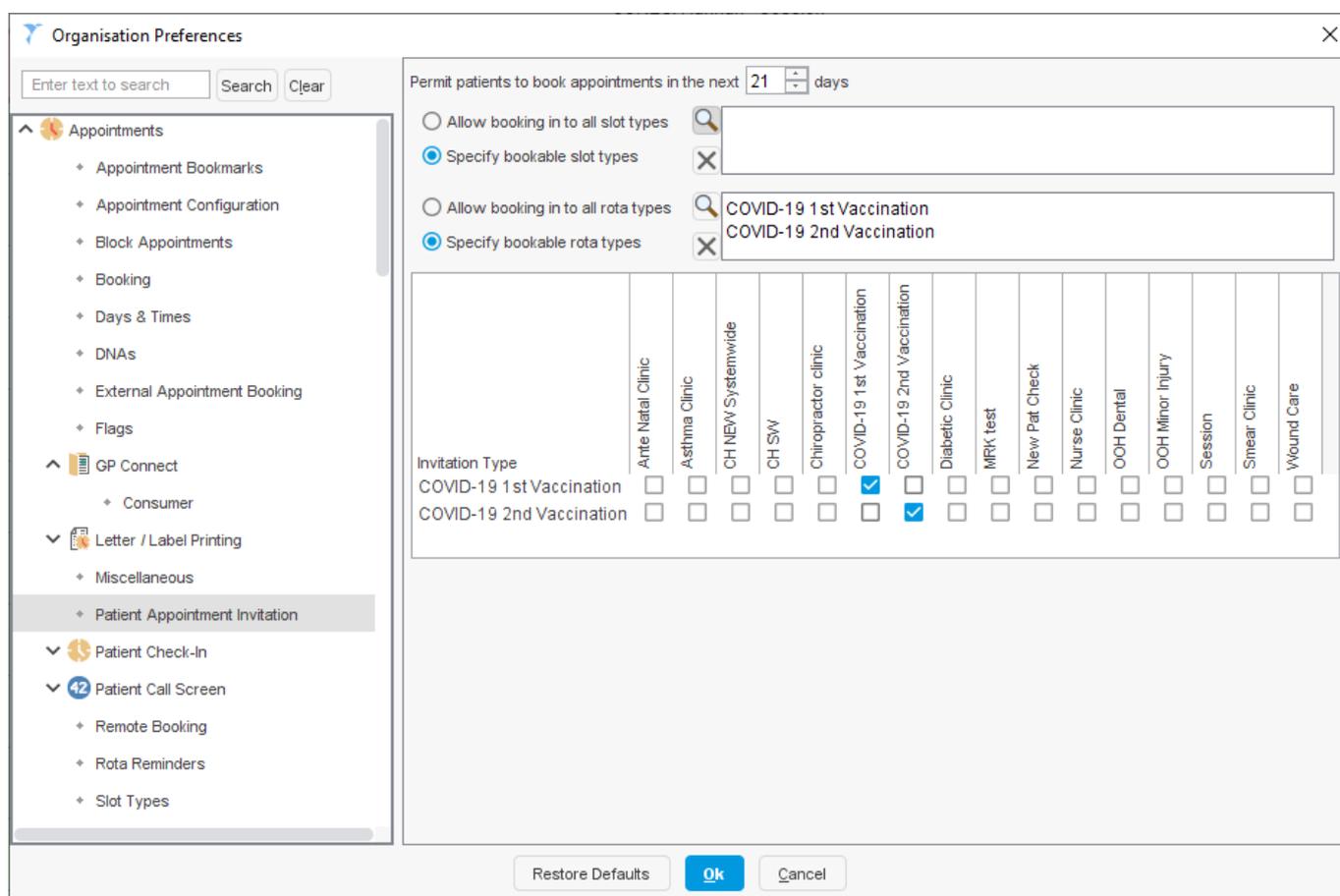


Fig 7. Organisation preferences controlling which appointments are available to book through the website.

For further information on how to create slot types and set up rotas, please refer to the appropriate section of SystemOne Online Help.

You can also set a limit on how far in the future to permit appointment booking, which can be between 1 and 60 days in advance.

### **Bulk appointment invitations and online booking**

These instructions are correct at the date of writing. For further assistance, consult the SystemOne Online Help.

Once you have set up which appointments are available on the website and have a list of patients that you want to invite for a vaccination (either by running a clinical report or via the bulk registration process detailed above), you can send them an invitation to book their vaccination online.

To do this, highlight the patients you want to contact from the list or select the entire list, and then pick the right-click option "Action" > "Send Patient Appointment Invitation".

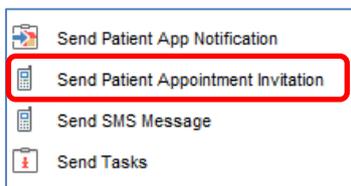


Fig 8. "Send Patient Appointment Invitation" list action

Once you have selected this list action, you are asked to choose the invitation type that you wish to send to the patient (see the section above on setting up invitation types for more detail on how these work).

You are then asked to choose whether you want to communicate with the patient using SMS or Email.

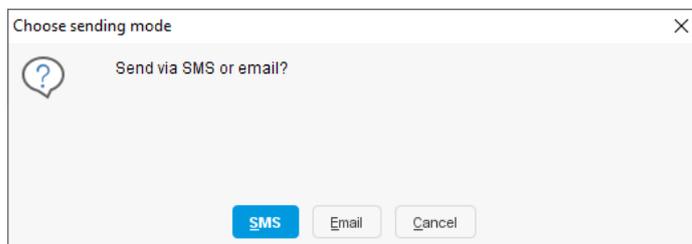


Fig 9. Choose to send URL link via SMS or Email

Note that each time you send a link to a patient, a new unique link is generated. So if you send one link via SMS and one via Email, then the patient will end up having two active invitations. You must ensure that you are only sending invitations as appropriate.

The content of the message are configurable, giving the opportunity to provide site-specific information. You can save presets, saving time when sending out the messages.

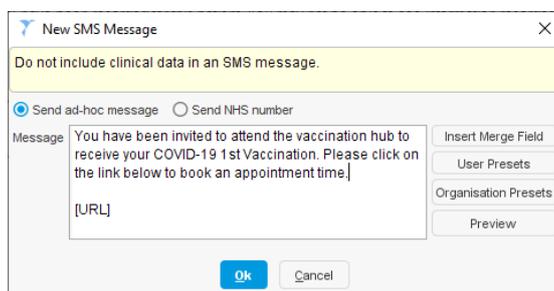


Fig 10. Composing SMS to send to patient's

This will send the patients either an SMS or email message with a unique link to SystemOne's appointment booking website.

These instructions are correct at the date of writing. For further assistance, consult the SystmOne Online Help.

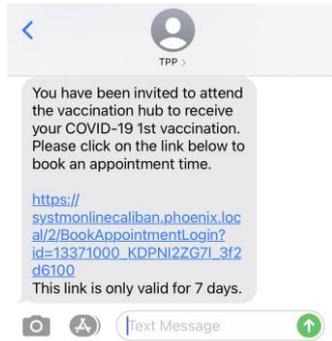


Fig 11. SMS message received on patient's phone

The link is active for 7 days after which point it will expire. If the patient has failed to book an appointment during this period, they will need another link sending.

When the patient clicks on the link, they will be asked to confirm their identity by entering their date of birth.

COVID-19 1st Vaccination

Please confirm your date of birth

Fig 12. Patient confirmation of DOB when clicking on the URL

Once they have confirmed their identity, the patient will then be presented with a list of available appointment sessions, including information about the location, clinician, and start/end time. They can apply date filters or a location filter if multiple locations are available (these are set up as branch sites in SystmOne).

Available Sessions

Period:

Location:

Melrose Clinic

Date	From	To	Clinician	Session Type	
Wed 24 Feb 2021	11:00	15:05	Dr Joe Howell (Male)	COVID-19 1st Vaccination	<input type="button" value="View"/>
Thu 25 Feb 2021	10:55	15:05	Dr Joe Howell (Male)	COVID-19 1st Vaccination	<input type="button" value="View"/>
Fri 26 Feb 2021	10:55	15:05	Dr Joe Howell (Male)	COVID-19 1st Vaccination	<input type="button" value="View"/>

Fig 13. List of available sessions for the patient to choose from

These instructions are correct at the date of writing. For further assistance, consult the SystemOne Online Help.

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

### Available Appointments

This is a list of available appointment times.  
Choose a time for your appointment and click Book.

Session with Dr Joe Howell (Male)  
Location: Melrose Clinic  
Wednesday 24 Feb 2021

Slot Type	From	To	
Slot (5m)	11:00	11:05	Book
Slot (5m)	11:05	11:10	Book
Slot (5m)	11:15	11:20	Book
Slot (5m)	11:20	11:25	Book
Slot (5m)	11:25	11:30	Book

Fig 14. List of available appointment slots for their chosen session

The patient will be asked to confirm the details of their chosen appointment, and then will see a dialog confirming their appointment details, with the ability to print these if required.

### Book Appointment

#### Appointment Booking Confirmed

Date:	24 Feb 2021
Day:	Wednesday
Start Time:	11:00
Duration (minutes):	5
Clinician:	Dr Joe Howell (Male)
Appointment Type:	Slot
Location:	Melrose Clinic (12 Low Lane, Horsforth, Leeds LS18 5PX)

Print

If you log in again using this link, you will see a reminder of your appointment details.

Fig 15. Booked appointment confirmation screen

### Viewing the booked appointments in SystemOne

Appointments will appear in SystemOne using the normal screens (Appointments Ledger or Overview). For full details on using these screens or appointment functionality in general, please refer to the appropriate sections of SystemOne Online Help guide.

These instructions are correct at the date of writing. For further assistance, consult the SystmOne Online Help.

I Hussain (Tomorrow) Thu 18 Feb	
<b>COVID-19 1st Vaccination Clinic - COVID 19 1st Vaccination</b>	
07:30 5m	BOBBINGTON, Bob 03 Oct 2006
07:35 5m	
07:40 5m	

Fig 16. Booked appointment in SystmOne

### Amending appointments

Currently, appointments can only be amended or cancelled through SystmOne.

If the patient wishes to amend or cancel, they should ring the centre running the vaccination clinic to request these changes.

When sending out your appointment invitations, you may wish to include contact information for the patient should they need to get in touch regarding their appointment.

## Tracking Appointment Invitations

You can track the status of your appointment invitation 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 this screen. 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.

Date Invitation Sent						
Between	16 Feb 2021	and		19 Feb 2021		
Name	Surname	NHS Number	Date Sent	Appointment Date	Appointment Status	Invitation Type
Arthur	Abbas	9001335829	19 Feb 2021 08:27	24 Feb 2021 11:10	Booked	COVID-19 1st Vaccination
Brian	Abbott	9148487848	19 Feb 2021 08:11	20 Feb 2021 07:35	Booked	COVID-19 1st Vaccination
Bob	Bobington		17 Feb 2021 09:11			COVID-19 1st Vaccination

Fig 17. Patient Appointment Invitations screen

## Manual Appointment Booking

You may still need to manually book appointments for some patients using the SystmOne appointments screens.

In these cases, SystmOne will attempt to link the appointment back to the invitation (where an invitation has already been generated), or create an invitation at the point of booking the appointment so you can track this alongside the patients that booked online.

These instructions are correct at the date of writing. For further assistance, consult the SystemOne Online Help.

### Invite sent

If the patient has been sent an invitation but the booking is being done on SystemOne rather than by the patient online, the system will check if the specific rota you are booking into is linked to the invitation that the patient was sent. See the section on organisation preferences above for more information on this.

You will be prompted to link the appointment to the existing invitation:

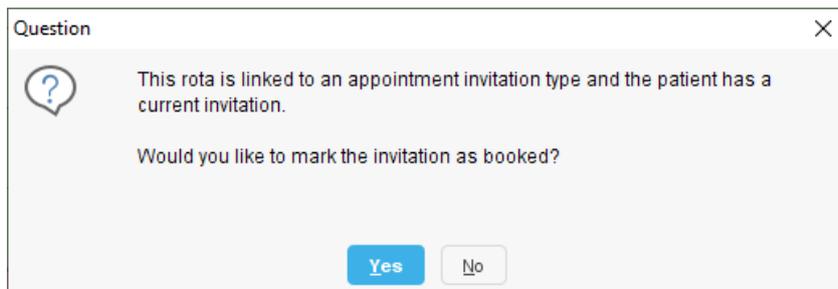


Fig 18. Prompt to link appointment to existing appointment invitation

### Invite has not been sent

If the patient has not been sent an invitation previously being done on SystemOne (e.g. for patients without a mobile phone or email address), then you will be asked whether you want to create an invitation for those patients.

Again, this uses the organisation preferences that link appointment rotas with appointment invitations to create an invitation with the appropriate type.

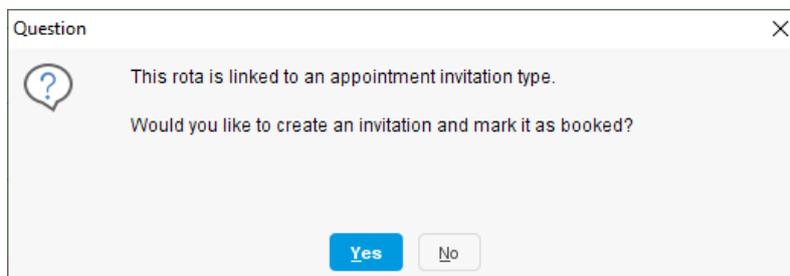


Fig 19. Prompt to create an appointment invitation and mark it as booked

The advantage of linking appointments to invitations is that you can see them on the Patient Appointment Invitations screen and have the option to use this screen to schedule future vaccinations (e.g. to schedule COVID-19 second vaccinations based on their first invitation and appointment date).

## Frequently Asked Questions

- Q.** Is the functionality available only at Hub units or can it be used by (for example) individual GP practices?
- A.** The functionality can be enabled at other unit types, including GP, community, and hospital care settings.
- Q.** Can invitation types be used for other appointments beyond COVID-19 vaccinations?
- A.** Yes, the functionality was developed to support the delivery of COVID-19 vaccinations but we see it has applications beyond this e.g. for Flu Clinics.
- Q.** Can I configure the content of the SMS/Email messages that are sent to patients?
- A.** Yes, we use the same SMS/Email template functionality that users will already be familiar with, allowing for customisation of the messages sent and the ability to us pre-set options.
- Q.** What is the maximum number of patients that can be bulk-invited in a single operation?
- A.** Currently the limit on sending SMS/Emails is 500 at a time, however we are reviewing this limit.
- Q.** Do patients receive reminders of their appointments?
- A.** Yes, the appointment is the same as any other in SystemOne, so if you have SMS reminders set up then these will be sent as normal.
- Q.** If I am using a Hub unit, can I restrict patients to booking into certain rotas e.g. a rota for the practice they are registered at?
- A.** Yes, this can be done by setting up a rota for each practice at the Hub unit (this will not work if you are just sharing rotas configured at the individual units via Shared Administration).
- Then you can set up appointment invitation types linked to the appropriate rota – patients that you send those invite types to will only be able to book into the rotas linked to the invitation type they received.
- Q.** Can I use the Bulk Import Patients tool to register patients other than for COVID-19 Vaccination rollout?
- A.** This functionality was specifically designed for the COVID-19 immunisation programme, and at present, this is the only use case that we are providing this functionality for.
- Q.** Who pays for the SMS messages?
- A.** You will need to have an account with an SMS provider and have this configured for use in SystemOne. If you are already sending SMS messages from the SystemOne unit you will be sending invites from, you do not need to do anything else. You can find more information about setting up SMS messaging in SystemOne Online (F1) Help.
- Q.** How can we use the system to identify 'follow-up' cohorts?
- A.** There are potentially several ways to do this, depending on how you are running your vaccination clinics in SystemOne:
- Imported lists: where the lists of patients is being provided by other organisations, you can simply import the 'follow-up' cohorts into the system using the Bulk Import Patients screen, or using the Ad Hoc Patient List if these patients are already registered at your unit e.g. from when you did the first vaccination. You can then choose to do various actions on the list of imported patients, including sending bulk appointment invitations.

These instructions are correct at the date of writing. For further assistance, consult the SystemOne Online Help.

- Clinical reporting: if you are an individual unit (e.g. a practice) or a PCN hub that accesses shared records from the GP, then there is the option to run clinical reports on the patient population that is registered at the unit/within the shared admin group. You can then choose to send vaccination appointment invites to the patients identified in the report via a List Action.
- Previous appointments: it is also possible to identify patients based on their first appointment, and to use this information to schedule their follow-up. For example, you could perform a list action to send a follow-up invitation to all patients who attended a particular clinic.

**Q.** Can patients cancel their appointment by accessing the link they were sent to the appointment booking page?

**A.** No, currently cancellations will still need to be done on the SystemOne frontend.