

Better informed means better care

Dorset Care Record brings all your health details together so medical and social care staff **can give you the best possible care**

Appointments in the DCR

Dorset Care Record

For more information please visit:
news.dorsetcouncil.gov.uk/dcr-staff-area

Appointments information in the DCR

The **Appointments** data category outlines future activity, and when a patient/client attends the appointment, the appointment becomes an encounter. This means that the information shows under Appointments until the moment when an encounter takes place, and from then on, it will then show both under **Appointments** and **Encounters.**

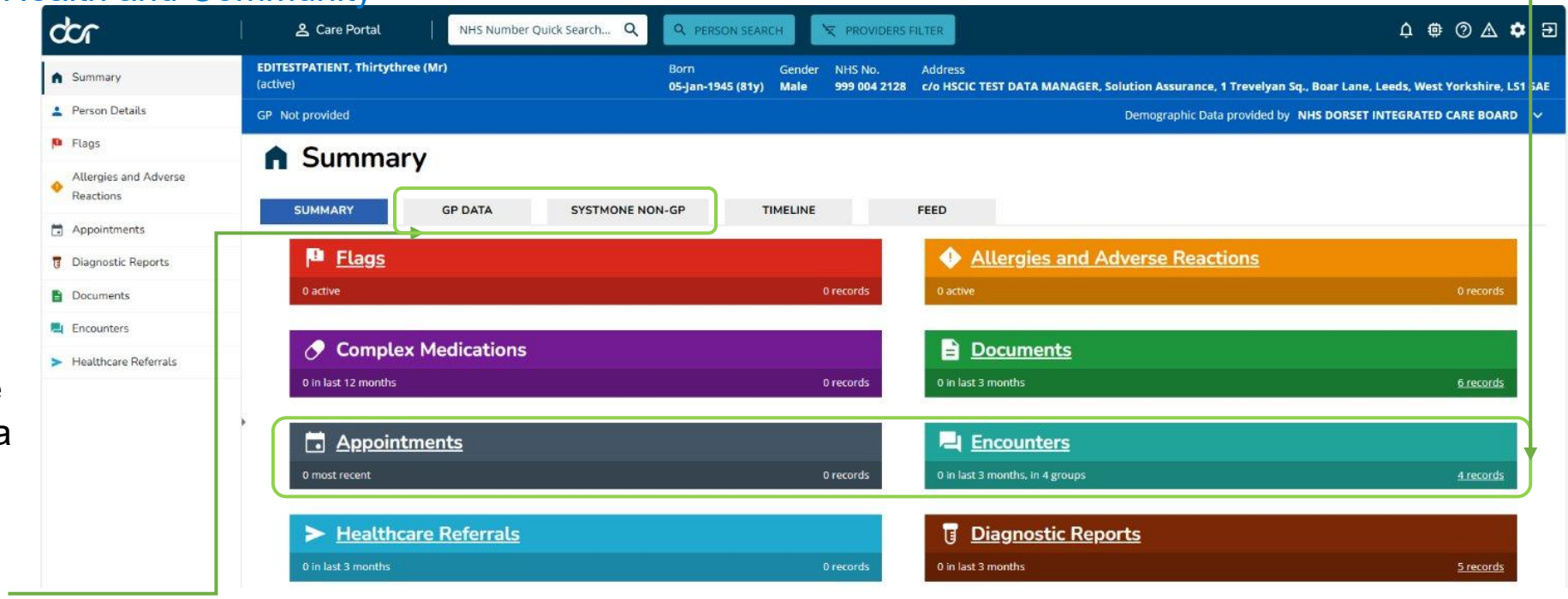
Appointments include acute inpatient and outpatient appointments only. Emergencies/unscheduled care can be found under **Encounters**.

The **DCR partner organisations** providing **Appointments** information in the DCR are:

- Dorset County Hospital
- University Hospitals Dorset
- Substance Misuse Services – Reach (DC area) and With you (BCP area)
- Dorset HealthCare – Mental Health and Community
- NHS Dorset/GPs

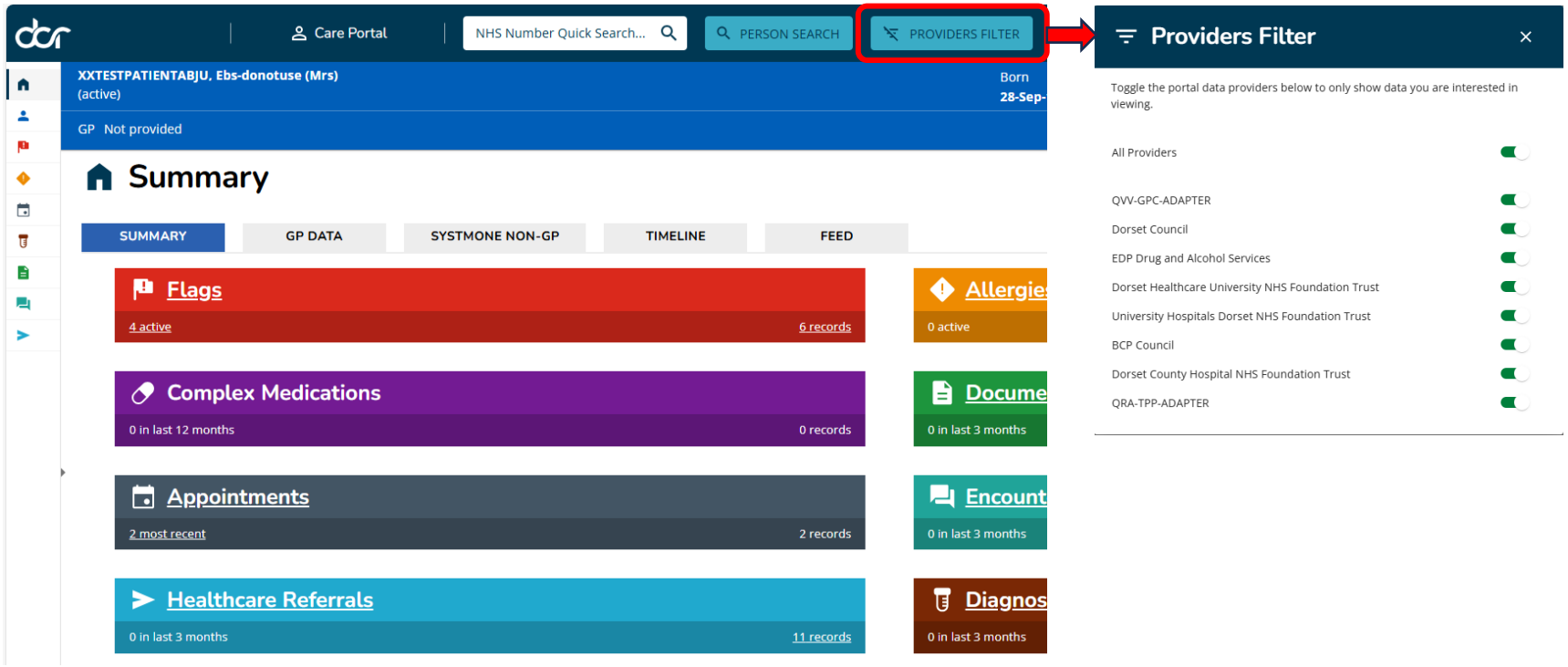
All provider data, except for the GP and DHC Community data, is presented together under the categories available in the DCR e.g. Flags, Allergies and adverse reactions, Appointments etc.

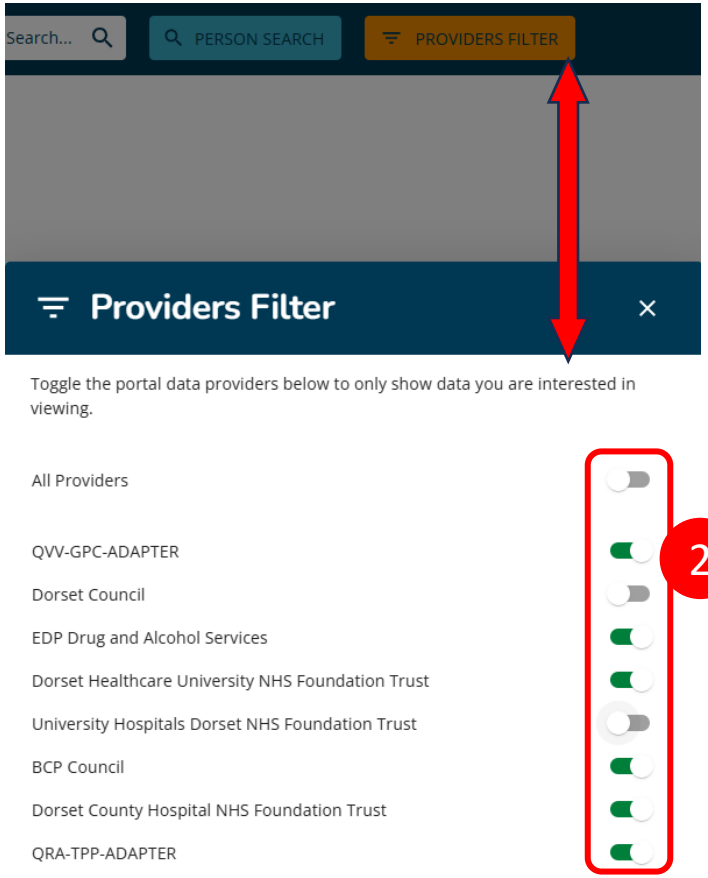
The GP and DHC Community are the exception to this, with the data from these organisations only available under the GP Data and SystmOne Non-GP tabs.



You can select the providers you would like to see Appointments data from

1 The **Providers Filter** displays all the data provider organisations sending data in the DCR for a particular record.





2 De-select/toggle providers to only see the data from the providers of interest. When only some providers are selected, the **Providers Filter** button changes colour from **turquoise** to **orange/amber** to alert you that you are seeing a restricted view of the data available for this record.

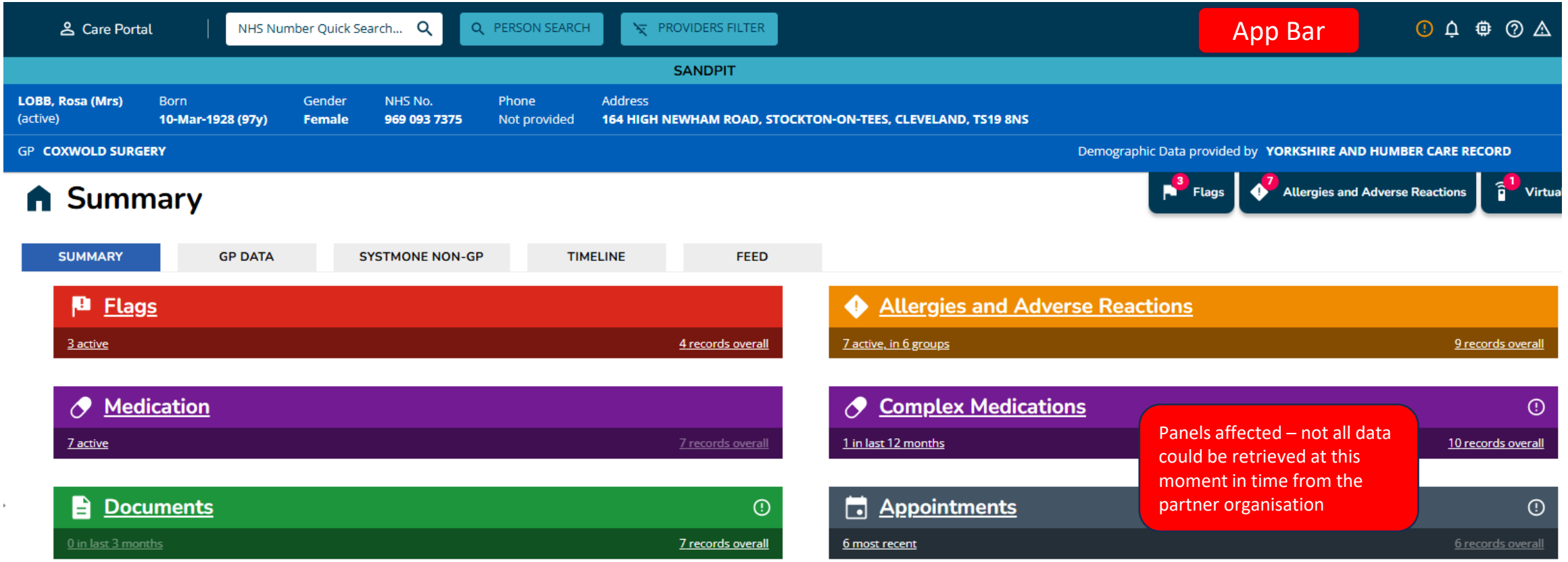
Please note the **Provider Filter** resets automatically to **All Providers** when you enter a new record.

Error warning when data cannot be retrieved from the provider organisations

The DCR retrieves data in real time from provider organisations; the DCR does not store any data.

When a provider's data cannot be retrieved, the DCR displays an error warning indicator:  . This can be seen at the top of the DCR screen in the App Bar and in the individual panels affected.

Clicking on the error icon will let you know what data is missing.

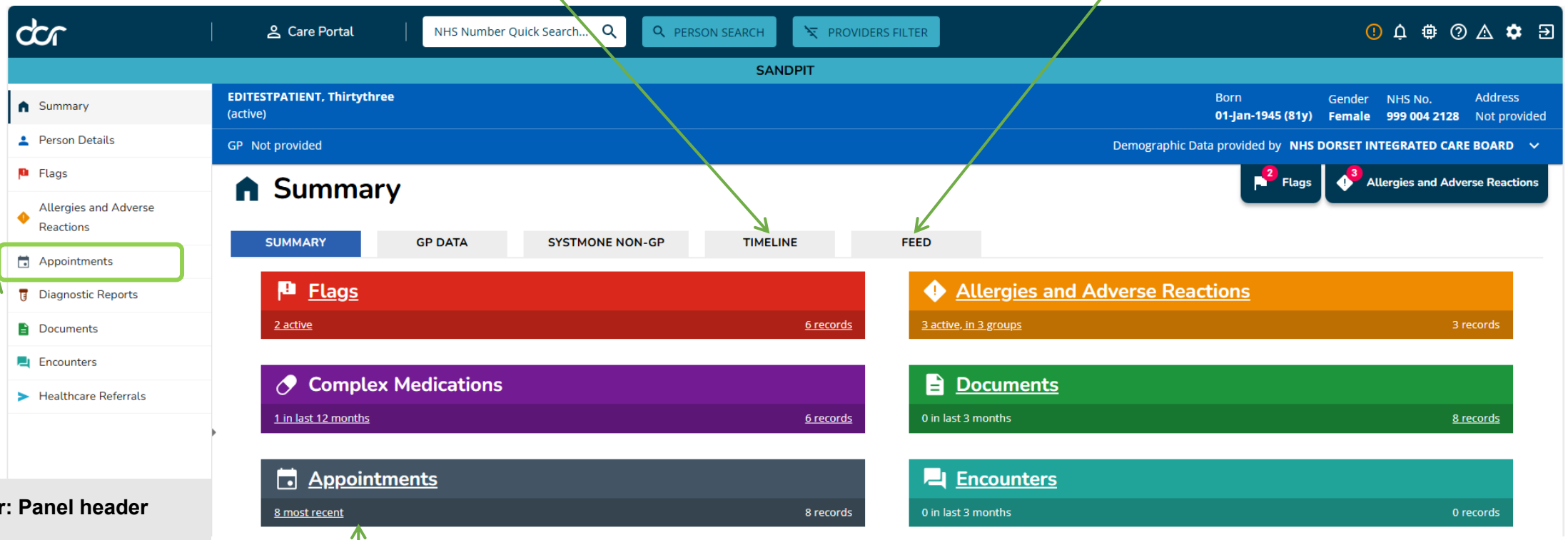


Where to find the Appointments data in the DCR

3. Use the Timeline tab for a horizontal view of a person's data from the **acute hospitals**.

It's helpful for identifying patterns.

4. Use the Feed tab for a vertical chronological view of a person's data from the **acute hospitals**



1. Sidebar: Panel header

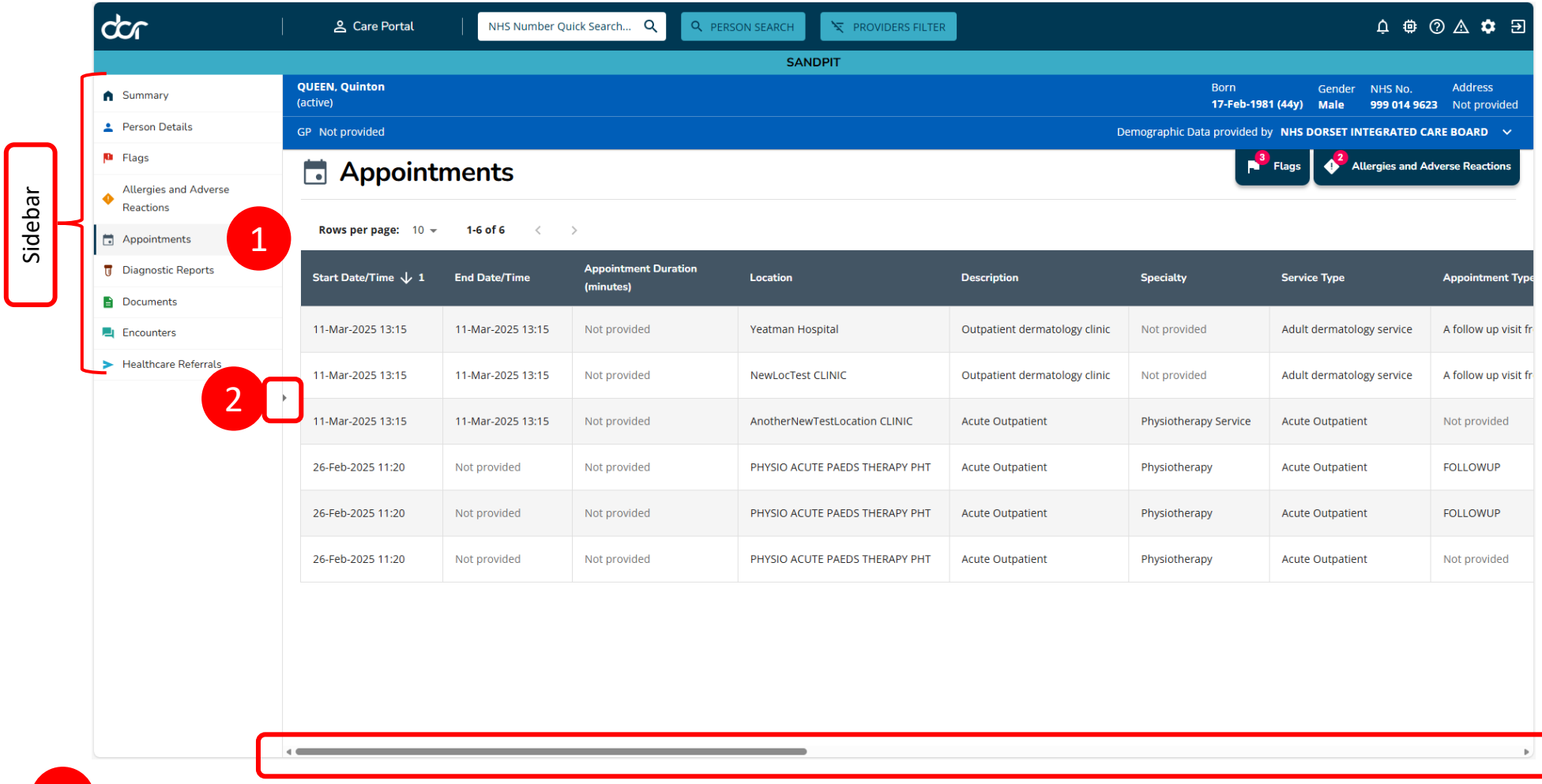
Click on panel header to see the appointments data in a table.

2. Summary tab: Appointments panel

Click on the underlined panel name to see the appointments data in a table or filter by most recent or overall.

1. Sidebar panel header: A table view

1 Click on **Appointments** in the Sidebar to see a table view of the appointments data.



Start Date/Time – the date/time that an appointment is to take place

Description – further describes the appointment

Service Type – the specific service that is to be performed during this appointment

Appointment Type – e.g. routine, emergency, urgent for scheduled but urgent appointments etc.

2 Use the arrow to collapse the **Sidebar** and have a better/enlarged view of the right side of the screen.

3 The table is quite wide, and you need to scroll to see the rest of it (please see next slide for the second half of the table).

Second half of the appointments table

Appointment Type	Status	Recorded on	Reason	Indication	Delivery Channel	Appointment Cancellation Reason	Patient Instruction	Participant (Primary Performer)	Additional Participants	Incoming Referral	Source Organisation(s)
A follow up visit from a previous appointment	Booked	Not provided	Paraffinoma of skin	Not provided	In-person	Patient	Not provided	primary performer Dr ANGEL CASTRO SILVA	Not provided	Not provided	University Hospitals Dorset NHS Foundation Trust
A follow up visit from a previous appointment	Booked	Not provided	Paraffinoma of skin	Not provided	In-person	Patient	Not provided	primary performer GREENWOOD	Not provided	Not provided	University Hospitals Dorset NHS Foundation Trust
Not provided	Booked	Not provided	Not provided	Not provided	In-person	Patient	Not provided	primary performer GREENWOOD	Not provided	Not provided	University Hospitals Dorset NHS Foundation Trust
FOLLOWUP	Fulfilled	Not provided	CPAP - SLEEP	Not provided	Not provided	Not provided	Not provided	primary performer Dr ANGEL CASTRO SILVA	Not provided	Not provided	University Hospitals Dorset NHS Foundation Trust
FOLLOWUP	Cancelled	Not provided	CPAP - SLEEP	Not provided	Not provided	Not provided	Not provided	primary performer Dr ANGEL CASTRO SILVA	Not provided	Not provided	University Hospitals Dorset NHS Foundation Trust
Not provided	Booked	Not provided	CPAP - SLEEP	Not provided	Not provided	Not provided	Not provided	primary performer Dr ANGEL CASTRO SILVA	Not provided	Not provided	University Hospitals Dorset NHS Foundation Trust

Reason – describes the different reasons that have led to the appointment

Delivery Channel – in-person, telephone or video

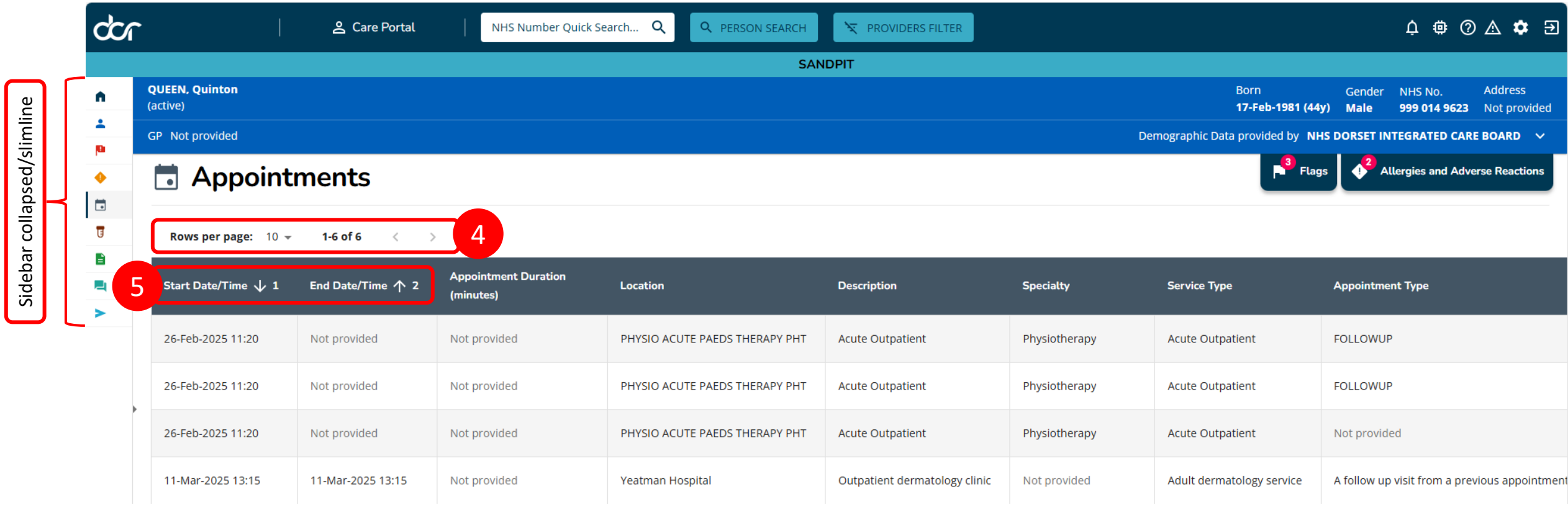
Appointment Cancellation Reason – if the appointment is cancelled

Status	What it means
Proposed	None of the participant(s) have finalised their acceptance of the appointment request, and the start/end time may not be set yet.
Pending	Some of all of the participant(s) have not finalised their acceptance of the appointment request.
Booked	All participant(s) have been considered and the appointment is confirmed to go ahead at the date/times specified. Also known as 'Planned' as the encounter has not yet started.
Arrived	Some of the patients have arrived.
Fulfilled	This appointment has completed and may have resulted in an encounter.
Cancelled	The appointment has been cancelled.
No show	Some or all of the participant(s) have not/did not appear for the appointment (usually the patient).
Entered in error	This instance should not have been part of this patient's medical record.

Participant (Primary Performer) – who the main practitioner involved is, once they have been allocated

There may be additional participants in addition to the Primary Performer (Participant).

Sorting the table

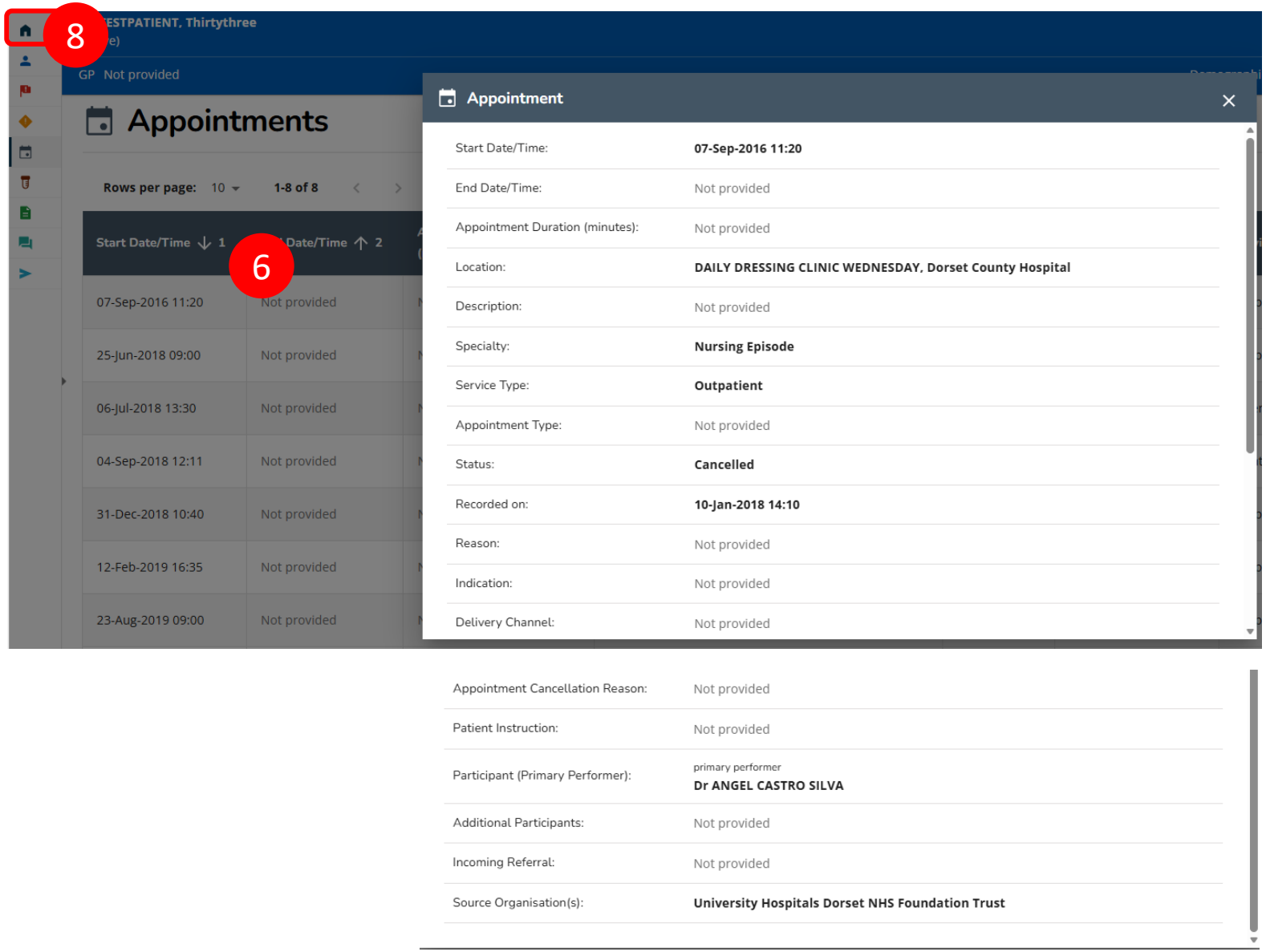


4 You can adjust the number of rows to see on a page by clicking on the drop-down arrow next to 10 and selecting either 5,10 or 25. Use the left and right arrows to move between pages.

5 The table shows the data entries sorted by most recent. The data can be further sorted concurrently by **Start Date/Time** and **End Date/Time.** As outlined before, the Providers Filter can also be used to filter by Provider.

A lightbox view for each appointment in the table

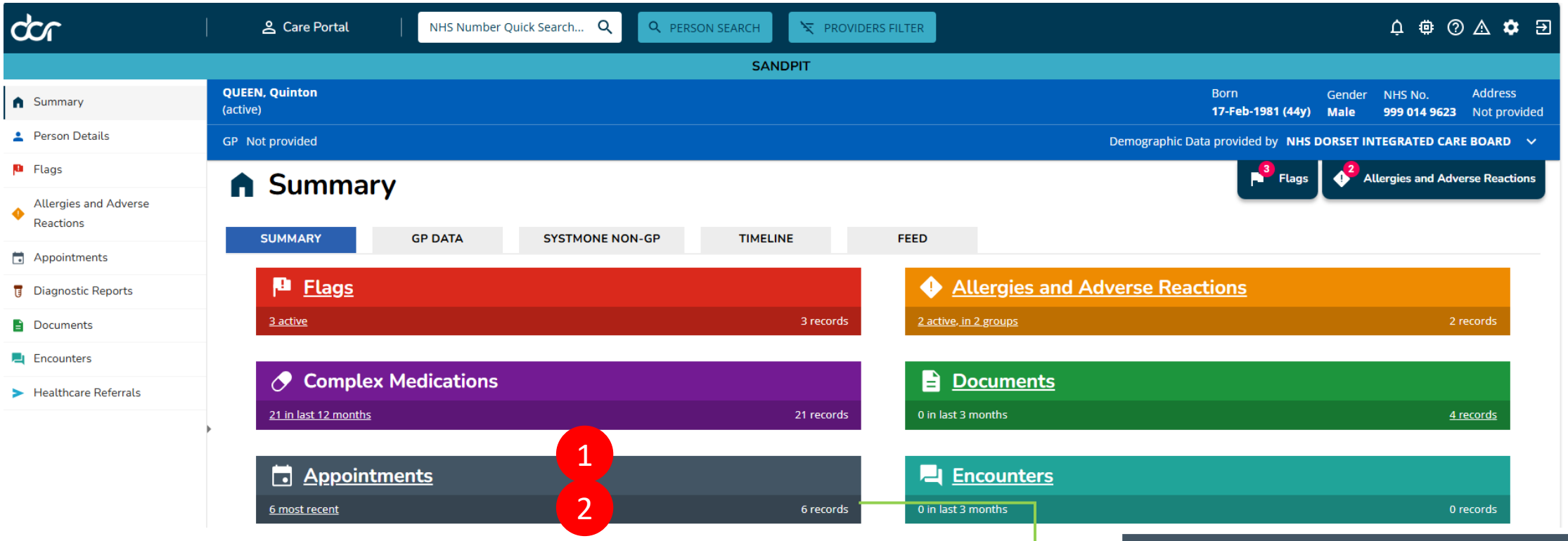
6 Click on a line in the table and the panel entry lightbox view will pop-up.



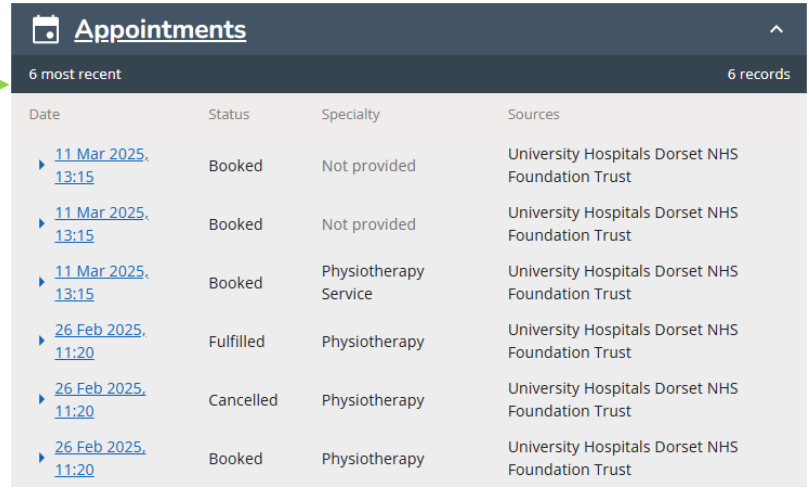
7 Scroll down to see the rest of the lightbox entries.

8 Click on **Summary** in the Sidebar to return to the Summary screen (or click on another **panel header** to navigate to the table view information from that panel).

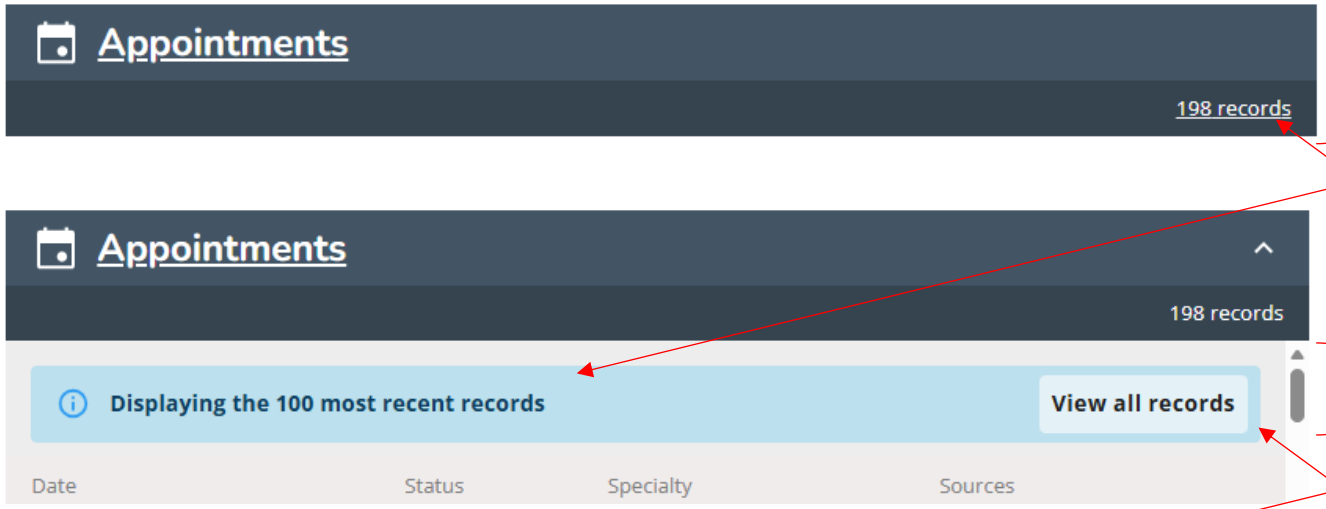
2. Appointments Panel on the Summary screen



1. Click on the panel header for the same table view of information as from the **Sidebar panel header**.
2. Underneath the panel header, click on the number of **most recent** or **overall records**.
   - If only the most recent records are available to click on, this means that there are only recent records to show.
   - If only the overall records are available to click on, that's because there are no recent records.



When there are more than 100 overall records under Appointments…

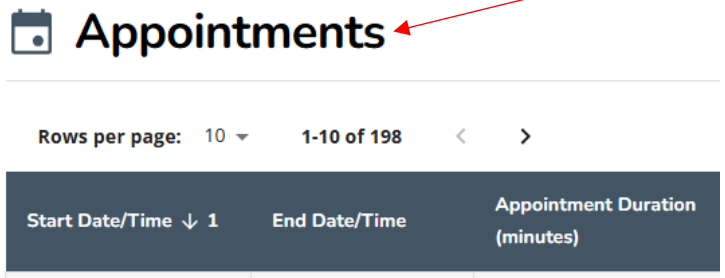


The ‘0 in the last 3 months filter will not show

Click on 198 records. This will display the 100 most recent records.

Scroll down to find the record you need.

To see all records, click ‘View all records’. This will open up the detailed table view.



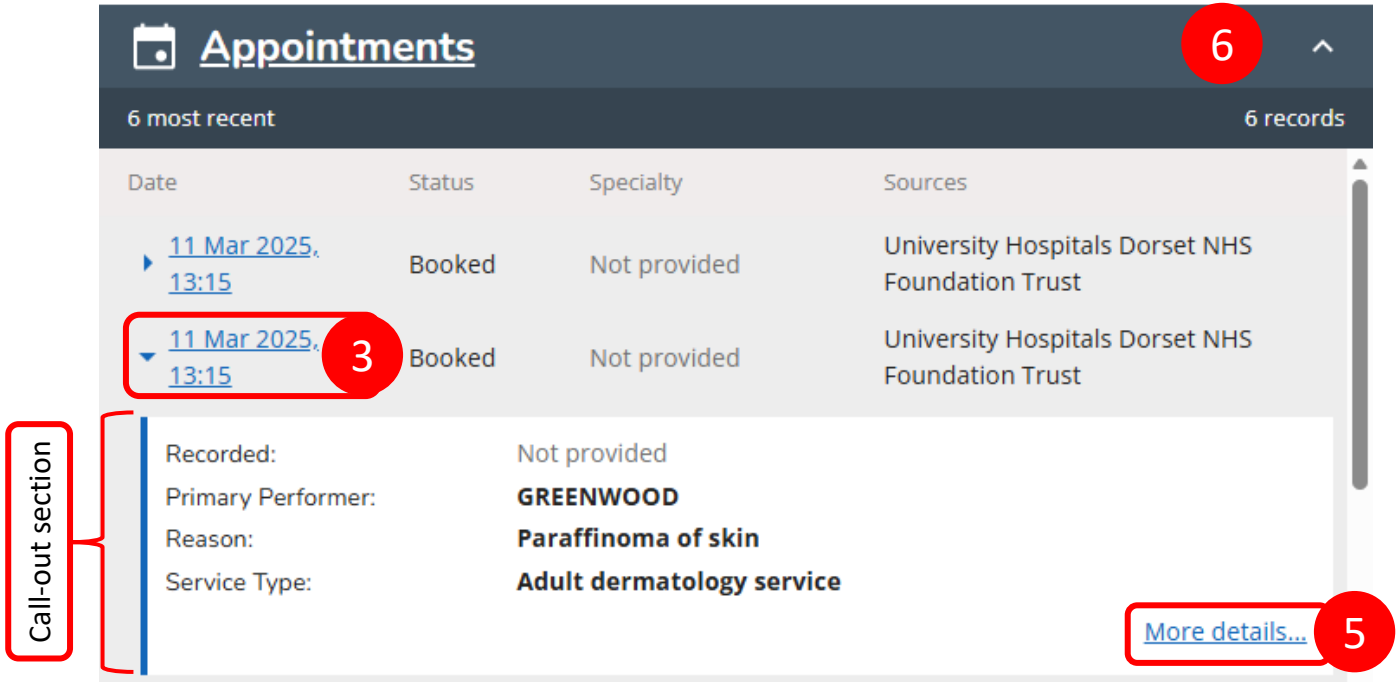
Panel information and ‘More details’ link to lightbox view

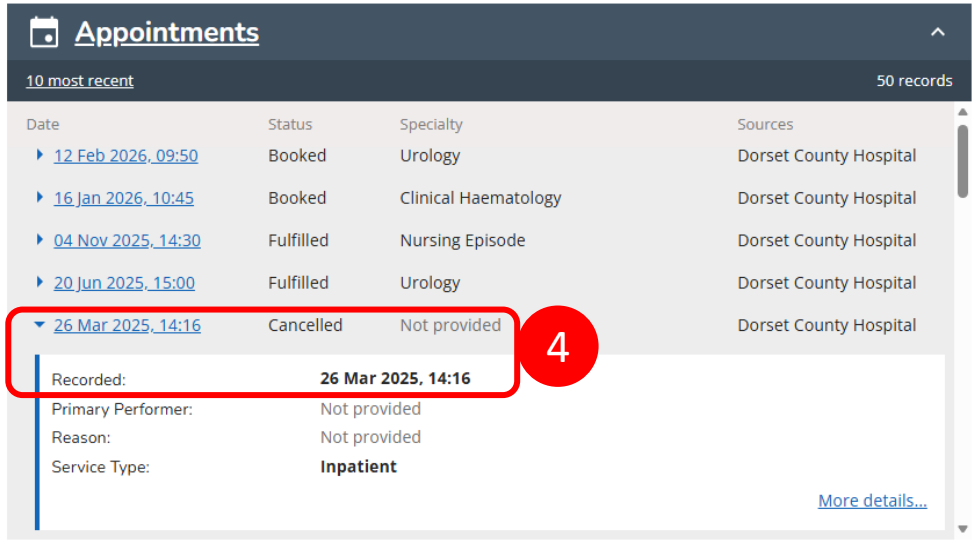
3 Click on a **blue arrow date and time stamp** to expand the view and see more detail in the ‘call-out’ section.

4 For Cancelled appointments, the Start Date and Recorded date are the same; and the Status shows as Cancelled.

5 Click on the **‘More details…’** link to display a lightbox view with all the details seen in the table view from the Sidebar panel header.

6 To minimise/collapse the panel, click the **up arrow**.



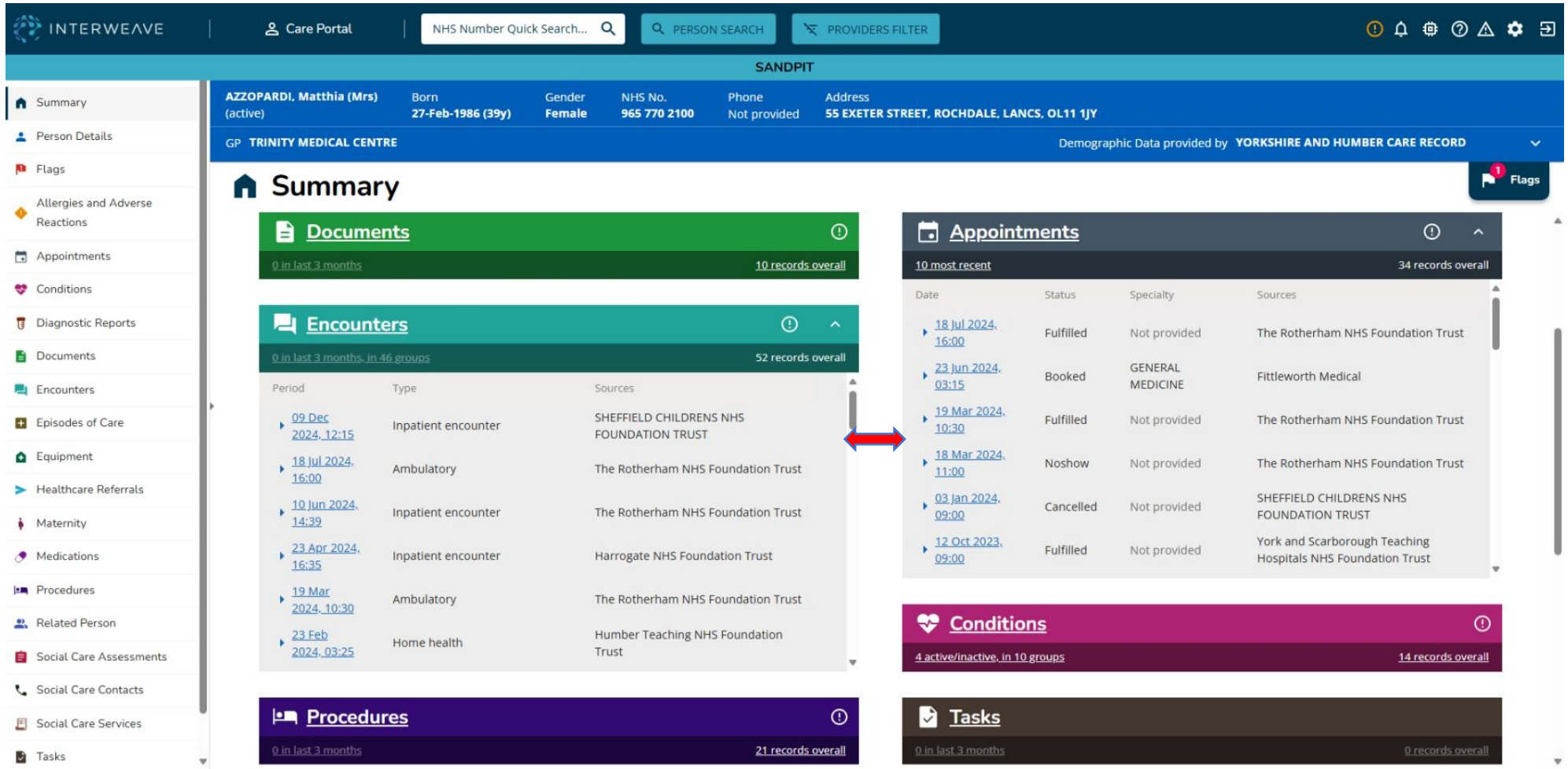


As outlined before, please note that there are separate panels for **Appointments**, as well as **Encounters** which may need to be reviewed or considered together at times – please see next slide.

The **Appointments** panel shows future appointments & the **Encounters** panel shows current and past encounters.

To see future appointments alongside current and past encounters, open both the Encounters and Appointments panels.

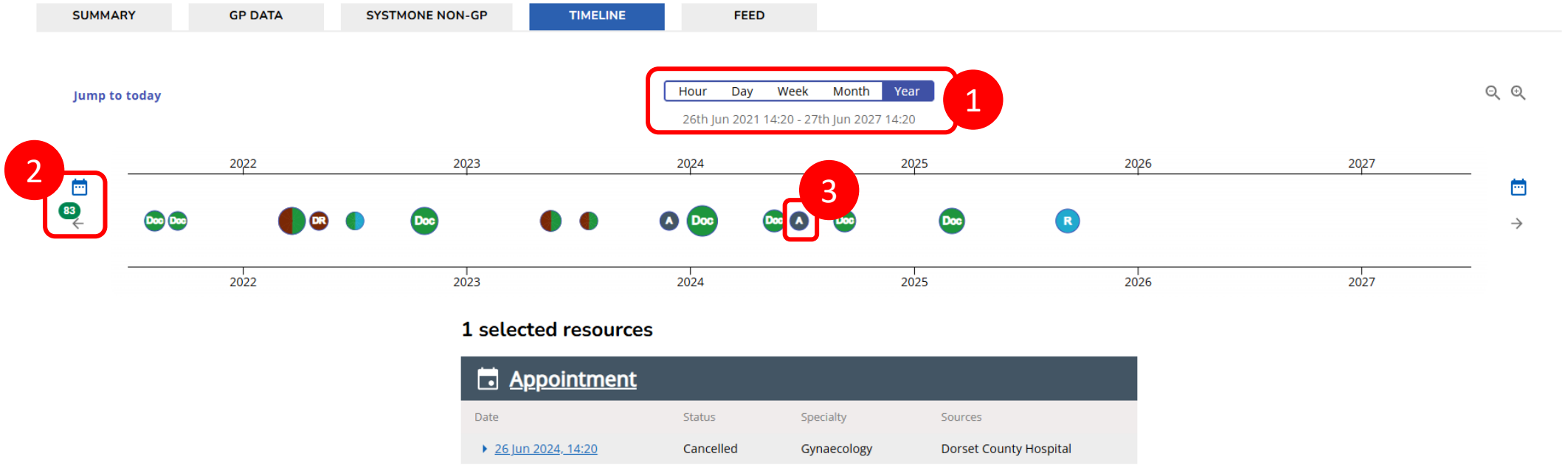
Please note that when the date has passed for an Appointment, an Appointment stays within Appointments with an outcome, and it is also added to Encounters.



3. Appointments can be seen on the Timeline tab

The **Timeline tab** provides a horizontal view of the data entries/records from all the panels. This display enables you to see where these records occurred relative to one another and may allow you to identify patterns.

The records show as **coloured circles**, where the colour corresponds to the colours used for the panels. The circle also includes initial letters which represent the panel for extra clarity. If more than one record has been added at the same time, the circles will show as a **bigger circle** for records from the same category or as a **cluster of multiple colours** for records from different categories.

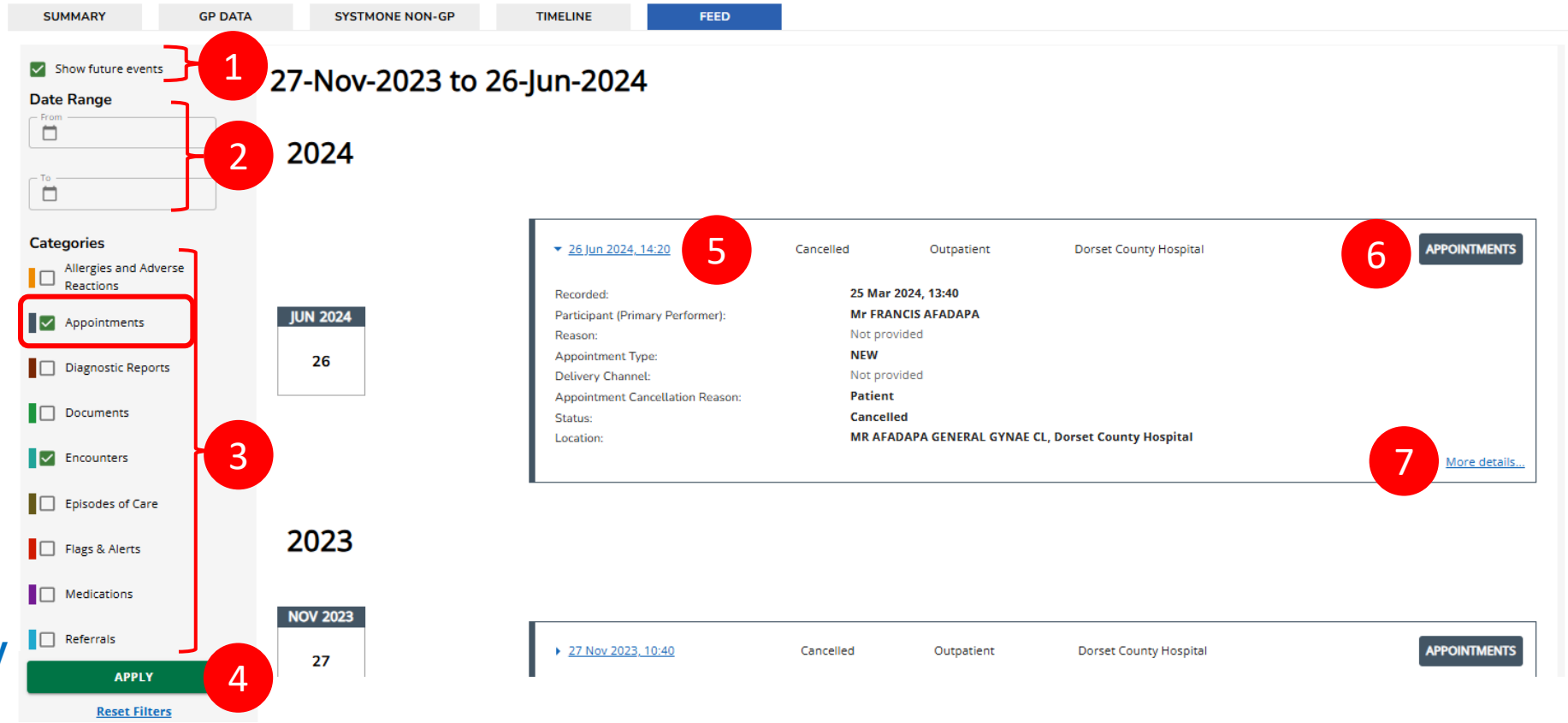


1. To see the records within a specific period, select your period e.g. hour, day, week, month or year.
2. If there are **no** records to display, change the selection or use the arrows either side of the timeline to view earlier or later records. The **green numbered circles** above the arrows show the number of records that fall outside the selected period.
3. Hover over or click on a circle/cluster to see the records it contains and see these listed underneath the timeline.

4. Appointments can be seen on the Feed tab (alongside Encounters)

The **Feed tab** provides a vertical chronological view of the data entries/records from all the panels. This display can be constrained to a certain date range, and/or filtered by category.

1. **'Show future events'** allows you to see upcoming appointments/records.
2. Select a **Date Range.**
3. Filter results - Deselect **Categories** not of interest.
4. Click **Apply** and see the results appear on the right.
5. Click the **blue arrow and description** for a summary of the entry.
6. Click on the **coloured category rectangle** to navigate to the panel table view.
7. Click **'More details'** for a pop-up of the panel lightbox view.



Access further **support and information** from
https://news.dorsetcouncil.gov.uk/dcr-staff-area/learning-resources/

Disclaimer

The screenshots in this training guide are taken from a test system and as such may vary slightly to the live DCR system.

Screenshots in this training guide do not contain any real patient data.

Data provided by source systems is read-only in DCR. The DCR Partners apply various levels of restrictions and sensitivities within their own systems, and the DCR displays the data as provided by the Partners.

The demographics information in the DCR is provided by the PDS (Personal Demographic System)/NHS Spine system.