Envisage Patient Check-in System
User Manual

Contactless Patient Check-in Software

Revision: 2.0

Software version 1.2.1

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The software licence agreement is available on our website:

https://www.envisagecoda.co.uk/patient-check-in-software-terms-conditions/

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The Envisage Patient Check-in software accesses patient and appointment data from the Practice's Patient Record System through the NHSE IM1 approved Application Programming Interface (API) in England, or the EMR system provider's API in other areas. The system has been formally accredited by NHSE and/or the EMR System provider.

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Envisage Patient Check-in

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Introduction

Envisage Patient Check-in will allow patients to check themselves in for a pre-booked appointment by using reception-based touch screens or by using the patient's own mobile smart phone. The appointment information is obtained from the Clinical Information System (eg. EMIS, Vision, TPP) using the NHSd approved IM1 interface (in England) or the proprietary partner APIs (other regions).

On entering the practice, the patient uses either the Touchscreen Display or their smart phone to check in for their appointment. If using their smart phone, the patient will scan a QR code displayed on the Touchscreen Display. The QR code takes them to a website in the smart phone browser where they are asked for the basic information needed to identify their appointment – their day and month of birth, plus first letter of surname. If a patient's upcoming appointment(s) can be uniquely identified from this information, the appointment is checked in on the practice's Clinical Information System (CIS) and the patient is notified of the appointment details on their smart phone. The window of time (how early or late) in which patients can check in for appointments is practice-definable.

No physical contact is needed if patients use the QR code and their own mobile phone. No special app nor pre-registration / login is required by the patient.

Patients who cannot scan a QR code, (eg. non-compatible phone or no connectivity on their phone) can instead use the touchscreen displaying the QR code to check-in.

In the event of any part of the process failing, the patient is referred to the practice reception staff to be checked in manually.

Pre-requisites

The following are required before installation and use of the software.

Communication with the Appointment Book on the Clinical Information System (CIS) requires installation of the check-in software on a receptionist's PC (or other PC which will remain logged in during surgery hours). This PC will require:

- Windows 10 or 11 Operating System.
- Internet access
- For TPP SystmOne users, a user must remain logged in to the CIS during surgery hours for the check-in system to be functional.

The Touchscreen Displays mounted in the reception area will require internet access. We can provide hardware to run the Kiosks (Touchscreen Displays). Alternatively, the customer can provide their own hardware. The requirements for customer supplied hardware are:

- Internet connection
- Internet browser running in Kiosk mode
- Screen resolution of 1920 x 1080

Clinical System Compatibility

Envisage Patient Check-in is currently compatible and accredited for use with the following clinical systems:

- EMIS WEB
- TPP SystmOne
- Cegedim Vision

The software may be expanded into other clinical systems in the future.

Installation

Initial installation and configuration is usually performed by remote support from our Technical Support team.

If self-installation is required, please contact our Technical Support team for details of how to obtain and register the software.

User Manual

The most recent version of the user manual is available by right clicking the Reception Module icon and selecting the User Manual menu item. The user manual will open in a web page and can be downloaded if required.

System Settings and Initialisation with the Clinical System

Once the Reception Module is installed, an icon will appear in the notifications area.

The red cross denotes the software is not yet communicating with the Clinical Information System.

When the Reception Module is successfully communicating with both the Clinical Information System and the Check-in Cloud Server, the Envisage Check-in icon will show a green tick.

Upon first installation, some configuration will be required before the Reception Module will connect with the appointments system.

Right click the icon and select **Settings**. A menu of settings is displayed down the left of the settings window.

Status

Here, the clinical system to which the software will connect is specified. Also shown is the status of the connection to the clinical system and the cloud service.

To specify the clinical system, click the **Configure** button. Select the clinical system in use from the drop-down menu. System specific data entries will be required; our technical support team will assist with these. You are advised not to change these settings without assistance from Numed Technical Support as doing so may adversely affect the operation of the system.

Envisage Check-in will attempt to connect to the system. On the first connection, you may need to acknowledge and accept the connection attempt. A red cross on the Clinical Information System icon indicates the check-in software is unable to communicate with appointments system.

The status of the cloud connection used to communicate with the waiting room Touchscreen Displays and the patients' phones is also shown. A red cross on the icon will indicate no connection to the cloud server has been possible. The setting for this should not be changed, please contact our support team if the cloud server shows no connection for more than a few minutes.

Site

On the **Site** menu, enter the Registration Code provided with your system and click the 'Update' button. This code is unique to your system and must not be shared or used elsewhere. Doing so may result in the system becoming inoperable.

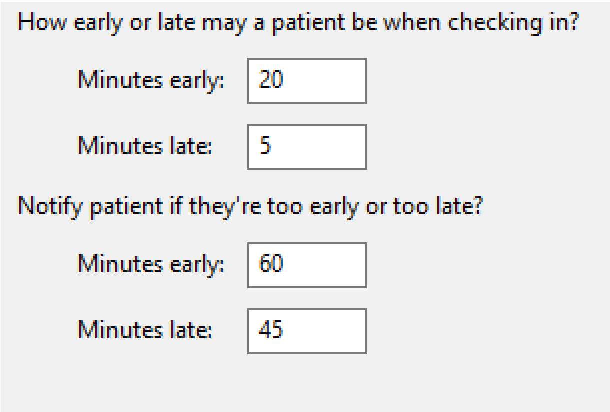
You can also optionally enter a **Site Name** here, such as your practice name, which will be displayed on the Check-in screens. If no practice name is specified, the default name obtained from the Clinical Information System will be used.

Branches

The **Branches** menu will show a list of site names that have been retrieved from the Clinical Information System. You can select a specific site to limit the ability for patients to only check in for appointments at the chosen site. This prevents, for example, patients whose appointment is at the branch site from checking in at the main site.
Note: this feature is not currently available on the Vision clinical system due to limitations with the Vision interface.

Check-in Window

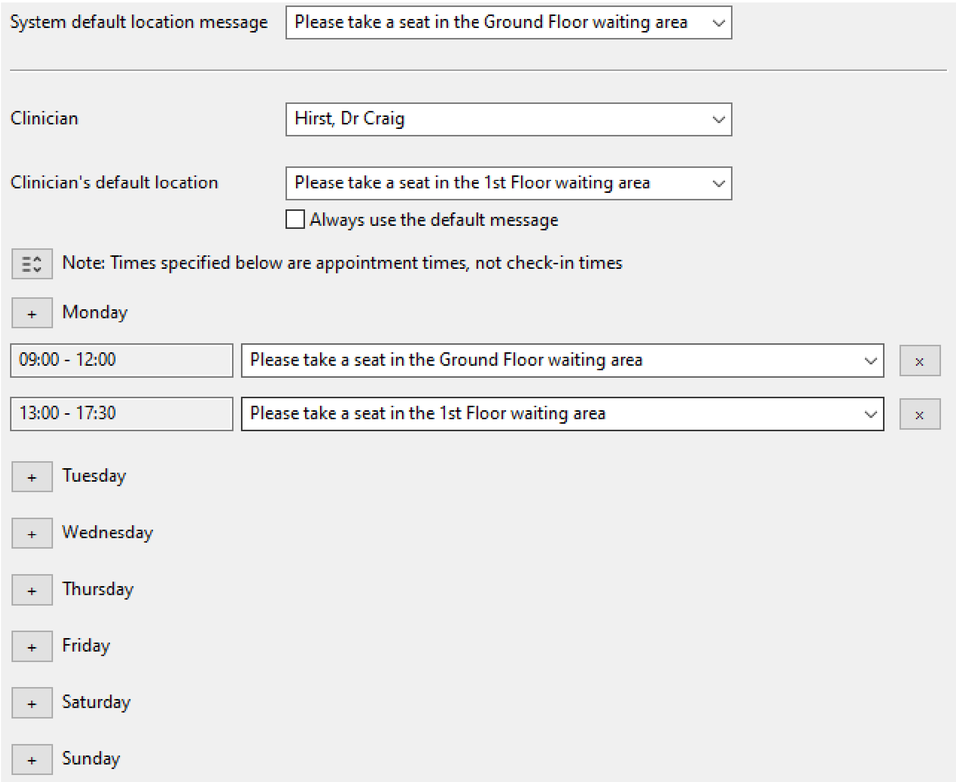
The **Check-in Window** menu allows you to choose how early or late a patient can be and still be allowed to check themselves in. There are two sets of entries. The first section specifies the actual number of minutes early and late the patient is allowed to be. The second section allows a wider window of time in which the patient is notified that their appointment has been found, but that they are too early or too late to be checked in. If you do not want to use to the ‘Too Early’ and ‘Too Late’ notifications, set the values to be the same as the first section.



Location Messages

Note: The software must be connected to the Clinical System to access the Location Messages settings.

Location Messages direct the patient to the correct waiting area for the clinician being seen. A range of location messages are available for selection from the drop-down. These are fixed to facilitate language translations. If you require a location message that is not currently available, please contact us and we will aim to make this available in a future software release.



System default location message: This message will be displayed to patients when no other clinician specific message is set.

Clinician: To specify a clinician specific location message, select the clinician from the drop-down selection. This list is derived from the clinical system.

Clinician's default location: If a daily timetable is not required, or only required at certain times, a default location for the selected clinician can be chosen. This will take priority over the system default message above. If **Always use the default message** is selected, the chosen message will be shown to patients seeing this clinician at all times.

Location timetable: If a clinician works in different areas at different times on different days, a timetable of locations can be specified. The **Always use the default message** box must be deselected to enable the timetable.

Click the **+** button next to the appropriate day to add an entry. Specify the appointment times during which the clinician is in the location and select the location message to be shown during that timeframe. Note the times specified are the **appointment times**, <u>not</u> the time of check-in.

In the time selection box, tick the **All day** box to use the selected message for the whole of that day.
Conflicts caused by overlapping timeframes are highlighted in red and must be corrected before saving is possible.

The times and messages can be edited by clicking in the appropriate box.

The entry can be deleted by clicking the cross at the end of the row.

Outside of any times specified, the Clinician's default message will be shown.

If a patient has two appointments with different clinicians within the Check-in Window, the location message for the clinician with the earliest appointment will be shown to the patient.

In order of priority, the location message shown to the patient at the time of check-in will be:

1. The message specified in the Clinician's location timetable for the appointment time, or if none is specified:
2. The Clinician's default location message, or if none is specified:
3. The System default location message.

Aliases

Aliases allow the default clinician and clinic names returned from the appointments system to be replaced with alternative text when the appointment confirmation is displayed to the patient. As sample of an Alias Message is shown in the Appointment Confirmation screen below. Click the **Add** button to create a new entry.

EMIS & SystmOne users: Click the **Add** button and select the Clinician name from the dropdown under the **Clinician** heading and the text which should be displayed to the patient in the **Replace with** box. Entries can be edited by clicking in the relevant box and deleted by clicking the red X at the end of the row.

Vision users: Type the name currently returned from the clinical system in the **Clinician** box and the text which should be displayed to the patient in the **Replace with** box.

Important note for Vision users: Vision users must enter aliases for all book owners that are clinic names rather than clinician names. Otherwise, with no aliases set for clinic names, the appointment confirmation will show a clinician name beginning with an asterisk, rather than the actual clinic name configured in the appointment system. This is a limitation of the Vision interface.

If Vision users require aliases for clinicians, the clinician short name or mnemonic must be entered as the value, with the preferred display name entered in the 'Replace with' box.

Patient Messages

The **Patient Messages** section allows the configuration of clinician specific messages to be shown to the patient, in addition to the successful appointment check-in message. As sample of a Patient Message is shown in the Appointment Confirmation screen below Once configured, the additional text will be shown to any patient who successfully checks in for the specific clinician.

To configure a message, find the Clinician or clinic name in the drop-down list – this list is derived from the names configured in the Clinical Information System. Aliases configured will also be available for selection towards the end of the list.

With the Clinician selected, type a brief message in the box below the clinician name. Messages are saved automatically upon completion. A list of all configured messages is shown.

To edit a message, select the clinician in the drop-down list and amend the text in the message box.

To delete a message, find the message under the **All messages** list and click the red cross next to the entry. Alternatively, selecting the clinician in the drop-down list and removing all the text will delete the entry.

QR Code

Checking in via QR Code on the patient's mobile phone can be enabled or disabled by selecting or deselecting the **Provide QR-based check-in** box. If deselected, no QR code will be displayed on the Touchscreen Display. Touchscreen based check-in will be available regardless of this setting.

Group

The Group section allows configuration for two or more appointment systems to share Touchscreen Displays in a shared waiting room. For example a GP practice and Community Services (eg Physiotherapy) may both be served from a common waiting area. More information on configuration of Groups is given later in the manual.

Statistics

Statistics showing system usage from the past 30 days are available in this section. Click on the link displayed to open a webpage with a usage summary report.

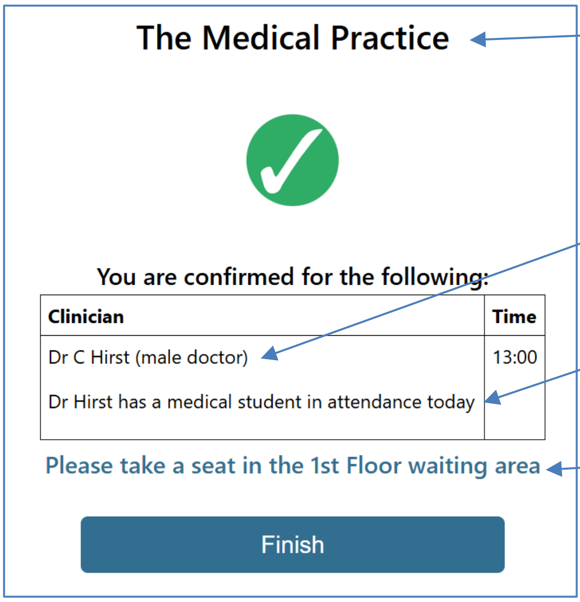
The report will show the number of check-in attempts, the number of successful attempts and the number of failed or incomplete attempts for both the Kiosk (touch screen) and QR scan (patients' phones).

A more detailed report showing daily totals can be downloaded from the webpage in CSV format.

Individual and specific patient check-in attempts and results are not available in the usage statistics for reasons of privacy.

Appointment Confirmation Screen

A typical Appointment Confirmation screen is shown below. This will vary slightly depending on the options configured.



Practice name (as configured in the 'Site' setting in Portcullis, or the name from the clinical system if not specified in Settings)

Clinician Name (this one has an Alias set to show 'male doctor' after the name)

Optional Patient Message (will not appear if none is configured)

Location Message telling the patient where to sit. If two or more appointments are checked in for the same patient, the location message for the earliest appointment will be shown

Adding Displays

At least one Display must be added for use in the Reception area. Touchscreen Displays are used by the patients to enter details facilitating a search for their upcoming appointment. They are also used to show an optional QR code that patients can scan with their smart phones allowing them to check-in on their phones rather than using the Touchscreen Display.

The Touchscreen Displays only require an internet browser – there is no software to install. If providing your own hardware, we recommend running the browser in Kiosk mode to prevent unauthorised access to other websites or other areas of the operating system.

To add a display, open a browser on the Touchscreen Display and go to the following URL:
https://patient-checkin.co.uk/display

The **Register Display** page should be shown. The display can be named (eg. Ground Floor Reception) – this is optional and simply for identification purposes when managing displays.

A pin code must now be entered that will associate the Touchscreen Display with the specific instance of the Reception Module. On the Reception PC, right click the Envisage Check-in icon and select 'Manage Displays'. (If this is the first display to be added the menu item will be 'Add Display' instead of 'Manage Displays'). The Manage Displays window will be shown, listing any currently registered displays.

Click the 'Add Display' button. A PIN code will be displayed. Enter this on the Touchscreen Display – the code is only shown and valid for approximately 30 seconds.

Once the PIN code has been entered and accepted and providing the Reception Module is connected to both the internet and the Clinical Information System, the Touchscreen Display should the Home page inviting patients to touch the screen to begin check-in or to scan the QR code (if this option is enabled). If the Reception Module is not fully connected, the Touchscreen Displays will show a 'temporarily unavailable' message. The Home page will be displayed and check-in will be available automatically as soon as the Reception Module is fully connected.

Managing Displays

Touchscreen Displays can be disabled by removing them from the available displays list.

Right click the Envisage Check-in icon on the Reception PC and select 'Manage Displays'. The Manage Displays window will be shown, listing any currently registered displays.

Find the display to be removed from the system and click the 'Delete' button adjacent to the entry.

If a display is removed in error, simply follow the instructions above for adding a display.

System Operation

The Reception PC must be logged on to Windows with the Envisage Check-in application running and, for TPP systems, a user must be logged in to the Clinical Information System for the Envisage Check-in System to be operational. The EMIS* and Vision clinical systems do not require a user to be logged in to Vision. If any of these criteria is not met, the Touchscreen Displays will show a 'system temporarily unavailable' message.
*EMIS systems can be configured to connect with or without the EMIS Web client being open.

There are two ways a patient can check themselves in:

- Using the Touchscreen Display
- Scanning the QR code on their Smart Phone

Checking in using the Touchscreen Display
Patients touch the screen to begin the check-in process and follow the instructions on the screen. Upon confirmation of their details, the system will search for an appointment with matching credentials. If a match is found, the patient will be checked in for their appointment and informed accordingly.

If the patient has multiple appointments within the practice specified window of time, they will be checked in for all appointments.

In the event of two or more patients sharing the same credentials, the no appointments will be checked in and the patient will be directed to reception.

Checking in with the QR Code
The patient should open the camera app on their smart phone and point it at the QR code. A URL of 'patient-checkin.co.uk' should be offered. Tap this to start the check-in process and follow the instructions on the phone. The process is exactly the same as when using the Touchscreen Display.

Note that some older smart phones or those that are running out of date operating systems may not have a compatible QR code reader available. Patients should use the touch screen if this is the case.

For successful use on the patient's phone, the following pre-requisites must be met:

- The smart phone must have a compatible QR code reader available. Most recent smart phones running up to date operating systems will have this.
- The smart phone must have an internet connection available, either through the mobile phone network or local Wi-Fi.
- The check-in process must be completed within 3 minutes of scanning the QR code. If not, a timeout message will be displayed and the QR code must be scanned again.

QR Code Information
The QR code is unique to the practice (or group of practices if Groups are configured) and is used to provide a link to the specific instance of the software running on the Reception PC.

The QR code can be seen to change every few seconds. Each QR code only remains valid for a period of approximately 3 minutes. If check-in is not completed within this timeframe, the QR code must be scanned again.

Attempting to scan a previously photographed QR code would result in an error message being displayed, with instruction to rescan the code on the waiting room display.

This ensures as far as possible that patients are physically in the practice when completing the check-in process.

Languages

A range of languages are available for patient selection via the drop-down selector in to top right corner of check-in screen on both the patient's phone and the Touchscreen Display.

Please contact us if you have a language requirement not currently available in the selection.

Error Codes

A failure to check in for an appointment will result in a message being displayed on the patient's phone or the Touchscreen Display. At the bottom of the screen will be an error code (eg. Code 1). The code is intended to give the receptionist an indication of the reason for the failure, without showing unnecessarily complicated messages to the patient. The error code reasons are shown below:

Code 0: Too early: Appointment found, but the patient is too early to check in.
Code 1: Too late: Appointment found, but the patient is too late to check in.
Code 2: No match, appointment was not found: no appointments matching the information supplied were found within the configured check-in window.
Code 3: Non-unique match: Appointments matching the information supplied were found for multiple patients and we are unable to determine which patient is correct.
Code 4: Clinical System not available: The check-in software was unable to communicate with the clinical system.
Code 5: Internal error: An internal error occurred.

Note that only appointments with a status of 'Booked' will be successfully checked in. Any appointments that the clinical system has automatically marked as DNA (due to lateness) may not be available for checking in and may be reported as 'Appointment not found', regardless of the 'minutes late' specified in settings. The exact functionality varies somewhat between different clinical systems.

Groups

If multiple practices or a mixture of practices and community services share the same waiting area, it is possible to group practices together to share Touchscreen Displays.

When Touchscreen Displays are grouped, upon scanning the QR code or touching the check-in screen, patients will be asked to select the name of the practice they are attending before proceeding with the check-in process.

The following pre-requisites are required for grouping:

- Each practice or service must be running a compatible appointment system.
- Each practice must have an instance of the Reception Module installed and connected to their specific Clinical Information System.

To enable grouping:

1. On the first practices' Reception Module, right click on the Reception Module icon in the notifications area. Select 'Settings', then 'Group'.
2. Click 'Start a New Group'.
3. Click 'Add Group Member'. A pin code will be displayed which is enabled for approximately 60 seconds.
4. On the second practices' Reception Module, right click on the Reception Module icon in the notifications area. Select 'Settings', then 'Group'.
5. Click 'Join an existing group' and enter the PIN displayed on the first Reception Module in point 3 above.

Important considerations when using Groups

- Touchscreen Displays can be added from any instance of the Envisage Check-in (Reception PC) software within the group and patients will be able to check-in for any practice in the group whose instance of the Reception PC software is running and connected to the appointment system.
- Touchscreen Displays will be available for use whilst one or more members of the group's reception module is connected to their appointment system.
- If none of the members of the group's reception module is connected to their respective appointments system, the Touchscreen Displays will show an 'unavailable' message. The Kiosk will automatically become available again when one or more members of the group becomes available.
- Any members of the group whose Reception module is not connected to their appointments system will not be shown as a selection option when patients begin checking in.

Software Updates

The Reception Module will check for and install software updates upon starting. You can also manually force a check for an update by right clicking the Envisage Check-in icon and selecting 'Check for updates'.

The Touchscreen Displays operate on an internet browser displaying web pages and have no application specific software installed.

Touchscreen Display hardware supplied by Numed will have operating system updates deployed automatically as the manufacturer of the hardware makes these available.

Help and Support

Numed Healthcare offers assistance with product training and technical support.

For **technical support** or **training advice**, please contact:
0114 399 0010 or support@numed.co.uk
Opening hours: 8am – 5:30pm, Monday – Friday (exc. Public Holidays in England)

Live Support via web chat box is available 8am – 5:30pm, Monday – Friday. Go to numed.co.uk/support and click on the Live Support button to initiate the session.

Our support and chat lines will be closed on public holidays in England.

Software Revision History

The table below details user-relevant changes to the software from May 2025 onwards.

Version	Change Detail	Release Date
1.2.1	Supports updated user interface. Supports Clinician Specific and timed Location Messages Support disabling QR-based check-in. The Settings window is now resizeable. The maximum length of a custom site name is now 55 characters. If you have set a custom site name, please ensure that it is not truncated. User interface updates to the patient messages settings pane.	May 2025