

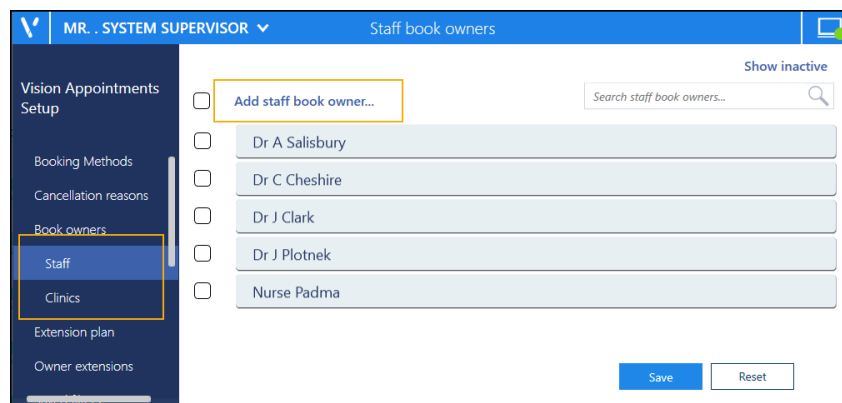


Creating a New Appointment Book


The following is a step by step guide to creating a new appointment book:

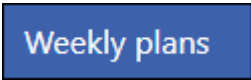

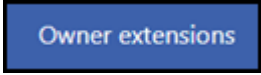


 **Note** - If you are creating a book for a member of staff, you must add the new staff member in Vision 3, see [Adding GPs and Doctors](#) or [Adding Nurses](#). This is not necessary if you are creating a book for a generic clinic.

1. From **Appointments Setup Extension plan**, select Appointments Setup menu .
2. Select either **Book owners - Staff** or **Clinics**.
3. Select **Add staff/clinic book owner**, and set up the new book owner, see [Add new Book Owner - Clinic](#) or [Add new Book Owner - Staff](#) for further details.



4. Select **Sessions**, if a suitable session does not exist, create the appropriate session(s) for the book owner, see [Create Sessions](#).

 **Note** - You may need to create new slot types, see [Slot Types Overview](#) for further details.

5. Select **Weekly plans**  and then **Add weekly plan** . Create a plan, see [Add Weekly Plans](#) for further details.
6. Select **Owner extensions** , select the new **Book owner - Edit**  and allocate a default weekly plan and extension period, see [Owner Extensions Overview](#) for further details.
7. Return to the **Extension Plan** screen.
8. Select **Filter**  and choose the new book owner. The view refreshes with the new book owner, see [Add Filters](#).
9. If required, modify the weeks, see [Updating Weekly Planner](#) for further details.
10. Right click on the new book owner and select **Extend now**, see [Extend Single Book](#) for further details.



Appointments Book Check List

Task	Completed
Set up the staff member in Vision 3 (if needed)	
Add new Book owner	
Create Session (if needed)	
Create Weekly Plan	
Allocate default Plan and extension period	
Add to Extension Plan view	
Update Planner	
Extend Books	

