

Appointments Release 3.5

Summary of Changes

Appointments release **3.5** contains the following new features and improvements:

All Users

• **Preferences** - **General** - **Enforce book owner restrictions** (This feature is dependent on **Vision 3** release **DLM 810**) - There is now a practice wide setting to enforce appointment booking restrictions by clinician:

Timescale for slot retrieval
From 7 days ago - To O the end of the books
O 7 • days in the future
Free slot definition
♠ ☐ Include "unbookable" free slots
♠ ☐ Include "overrun" free slots
Booking Appointments
\clubsuit Show option to merge slots when an appointment overruns free slots
Prevent concurrent appointments
♠ ✓ Enforce days/hours prior restrictions
♠ ✓ Enforce book owner restrictions
Patient search
Leferred search Single input
Joint Appointments
♠
Save Reset





If Enforce book owner restrictions is:

- **Ticked** Only the book owner(s) specified in the restriction can book appointments. This includes appointments being moved or copied from the clipboard.
- Not Ticked The practice setting is not enforced, when an unspecified book owner books a patient into a slot with a book owner restriction, they can select Ignore Book Owner restriction to ignore the setting.

See **Book Owner Restriction** on page **4** for more details.

Appointment Override reasons (This feature is dependent on Vision 3 release DLM 810) - When booking an appointment in a slot with a Book Owner restriction, you must now select a pre-defined Override reason.

See Overriding a Book Owner Restriction on page 5 for more details.

- Booking Form You can no longer change slot types to Non-bookable or Web bookable from the Booking Form. You can only change a slot to a Non-bookable or Web bookable slot type from the Reception View and Weekly View screens.
- Practice Wide Filters You can now select Options Refresh setup data to update any changes made to practice wide filters in Appointments or Appointments Setup. A practice wide filter can be updated by another user without impacting your work, the changes only update when you select Refresh setup data, or the next time you log into Appointments.



Practice Only Users

• Test Patients - Test patients now display with a prefix advising that they are a test patient on both the Patient Banner and Patient Search Results screen:



Shared Care Users

• Appointments Clipboard - The total number of moved appointments per organisation now displays on the Moved Awaiting Re-booking tab:

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Appointme	nts Clipb	oard	Sort	(A-Z)	×
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See <u>Appointments Setup Release 3.5</u> for details about what is new in **Appointments Setup**.



Appointments Restrictions

Book Owner Restriction

If you select a slot with a **Book Owner** restriction, a warning displays and you cannot select **Book**:

Friday 21st Apr 2023 12:20 - BOB ASH - Dundee Dr Robert		Vie	ج w audit history
A Restricted to 1 Clinician(s).			
Special Booking Patient search			
Search for a patient	Q		0
Booking method			Duration
		~	10 mins
Appointment comments			
Enter appointment comments here			
Link another appointment			
Ignore Book Owner restriction		Book	Cancel

- If **Enforce book owner restrictions** is set in **Preferences General** you cannot continue with the booking.
- If Enforce book owner restrictions is not set in Preferences General you can tick Ignore Book Owner restriction on the booking form and book the slot:





Overriding a Book Owner Restriction

If **Enforce book owner restrictions** is not set in **Preferences - General** and you tick **Ignore Book Owner restriction** on the booking form to book the slot, you must enter an **Override Reason** to record why you booked an appointment in a slot with a **Book Owner** restriction.

Note - You are only prompted to add an **Override Reason** when one is set up in **Appointments Setup**. See <u>Adding Override Reasons</u> in the **Appointments Setup Help Centre** for more information.

To override a **Book Owner** restriction:

- 1. From the **Reception View** select a slot with a **Book Owner** restriction. The booking form displays a warning.
- 2. Tick **Ignore Book Owner restriction** on the booking form and select an **Override reason** from the available list:

Dr Robert					View audit his	
A Restricted to 1 Clinician(s).						
Special Booking						
Patient search						
Search for a patient			0		0	
Booking method					Duration	
				~	10 min	
Appointment comments						
Enter appointment comments here						
Link another appointment						
 Ignore Book Owner restriction 						
Override reason						
	~			ok	Cancel	
GP Request		14:00 until 17:30				
Emergency						
Practice Manager Permission Given						

The **Slot Audit History** records **Override reasons** used to book an appointment in a slot with a **Book Owner** restriction.