

# Appointments Release 3.5

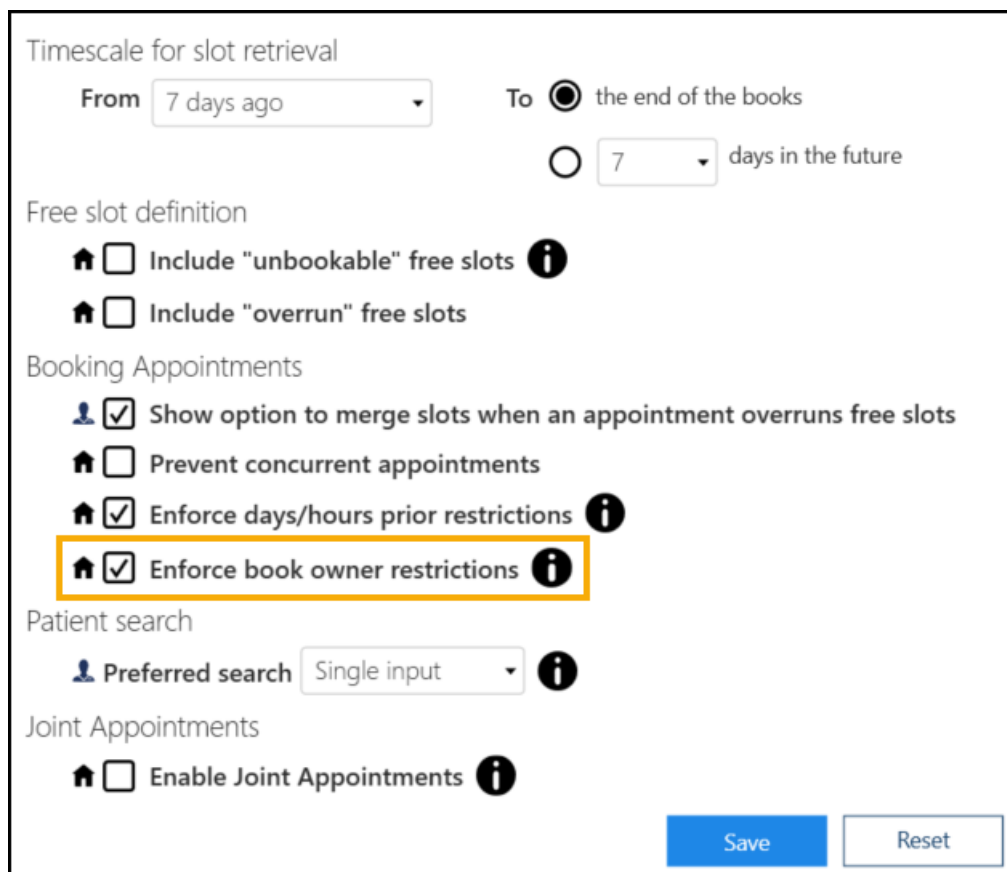
## Summary of Changes

**i** **Important** - For full functionality you must be on a minimum of **Vision 3** release **DLM 860**, see [Checking your Current DLM Version](#) in the **Vision 3 Front Screen Help Centre** for details.

**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  To  the end of the books  
  days in the future

Free slot definition

Include "unbookable" free slots **i**

Include "overrun" free slots

Booking Appointments

Show option to merge slots when an appointment overruns free slots

Prevent concurrent appointments

Enforce days/hours prior restrictions **i**

Enforce book owner restrictions **i**

Patient search

Preferred search  **i**

Joint Appointments

Enable Joint Appointments **i**



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.


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- **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.

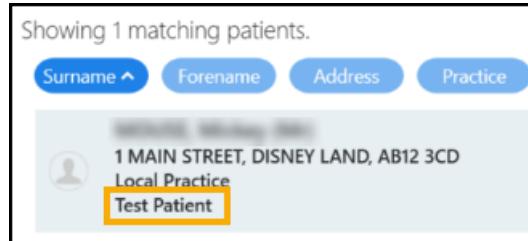
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- **Booking Form** - You can no longer change slot types to **Non-bookable** or **Web bookable** from the **Booking Form**. You can only change a slot to a **Non-bookable** or **Web bookable** slot type from the **Reception View** and **Weekly View** 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**.



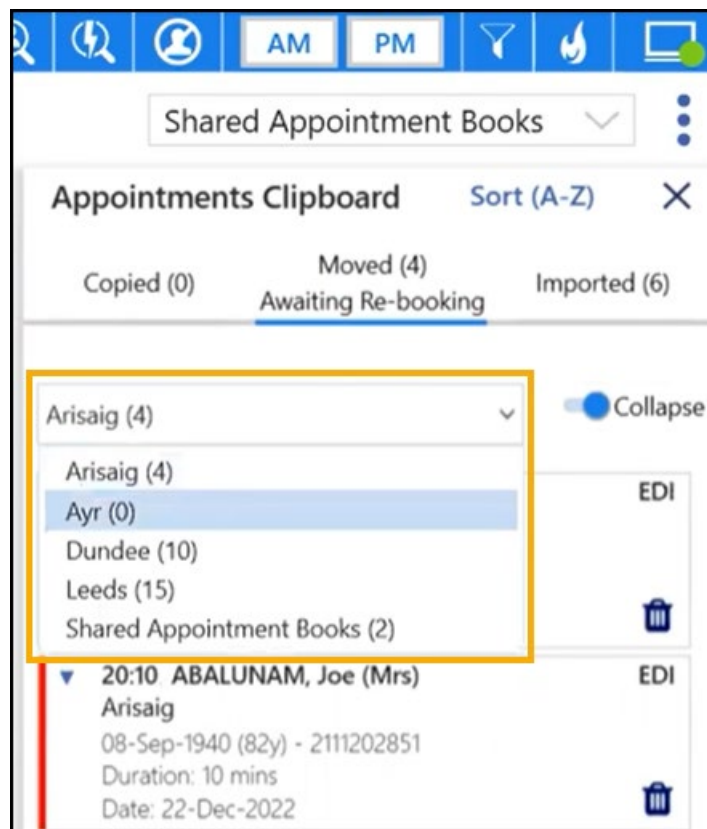
## Practice Only Users

- **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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 See [Appointments Setup Release 3.5](#) for details about what is new in **Appointments Setup**.

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## Appointments Restrictions

### Book Owner Restriction

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

The screenshot shows a booking form for a slot on Friday 21st Apr 2023 at 12:20, booked by BOB ASH in Dundee. The clinician is Dr Robert. A red warning banner at the top states "Restricted to 1 Clinician(s)". Below this, there are several form fields: "Special Booking" (unchecked), "Patient search" (with a search input and magnifying glass icon), "Booking method" (a dropdown menu), "Duration" (set to 10 mins), and "Appointment comments" (a text area). At the bottom, there are three checkboxes: "Link another appointment" (unchecked), "Ignore Book Owner restriction" (unchecked), and "Override reason" (a dropdown menu). Three buttons are at the bottom right: "Book + Print", "Book", and "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:

A close-up of the bottom section of the booking form. A box on the left contains the text "Tick to ignore the restriction" with an arrow pointing to the "Ignore Book Owner restriction" checkbox, which is now checked. Below it is the "Override reason" dropdown menu.



## 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 [Adding Override Reasons](#) 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:

The screenshot shows a booking form for a slot on Friday 21st Apr 2023 at 12:20 for Dr Robert. A red warning banner at the top states "Restricted to 1 Clinician(s)". The form includes fields for "Special Booking", "Patient search", "Booking method", "Duration" (set to 10 mins), and "Appointment comments". At the bottom, the "Ignore Book Owner restriction" checkbox is checked, and a dropdown menu for "Override reason" is open, showing options: "GP Request", "Emergency", and "Practice Manager Permission Given". Buttons for "Book + Print", "Book", and "Cancel" are visible at the bottom right.

3. Select **Book**  to override the restriction and book the slot.

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