Vision Appointments Release v2.2

Vision Appointments release v2.2 contains the following updates:

Vision Appointments Setup

- **Open Appointments Setup** - You can now open the **Vision Appointments Setup** app from within **Vision Appointments**, simply select **Options** ⋮ - **Run Setup App**.
- **Refresh setup data** - If you have made changes in the **Appointments Setup App**, from the **Appointments App** you can now select **Options** ⋮ - **Refresh setup data** to update the Appointments App with the changes.

Making and Managing Appointments

- **Slot type indicator** - Based on customer feedback, we have made the colour band used to indicate the slot type wider.
- **Completed Slots** - You can now select to display completed slots in green:

  See Preferences - Display Options on page 8 for details.

- **Slot Advisory Message** - If you attempt to move an appointment to a slot with a message, for example, Book on the Day only, a Slot Advisory Message displays containing the message, you can select either:
    - **Yes** - To continue with the move, or
    - **No** - To select a different slot
- **Days Prior Warnings** - If you move or copy an appointment to a slot with a days prior value set, for example a book on the day slot, a new warning message displays. Select either:
    - **Yes** - To make to booking in the selected slot, or
    - **No** - To select a different slot.
- **Cancelling Appointments** - When you select to cancel one or more appointments, the **Cancel this appointment?** screen displays listing all the appointments selected. **View scheduled appointments for this patient** now displays alongside each appointment, select to display the **Scheduled Appointments** screen for that patient.

Patient Details View

- **Vertical Scroll** - Based on customer feedback the Patient Details View now scrolls vertically.
- **Historical Appointment Overview** - A new historical appointment overview section displays in the **Patient Details View**. This displays a statistical snapshot of the selected patient's appointment history in the last 6 months, including:
    - **Appointments Attended**
    - **Late Arrivals**
    - **Appointments Overrun**
    - **Allocated Time Used**
    - **Average Appointment Frequency**
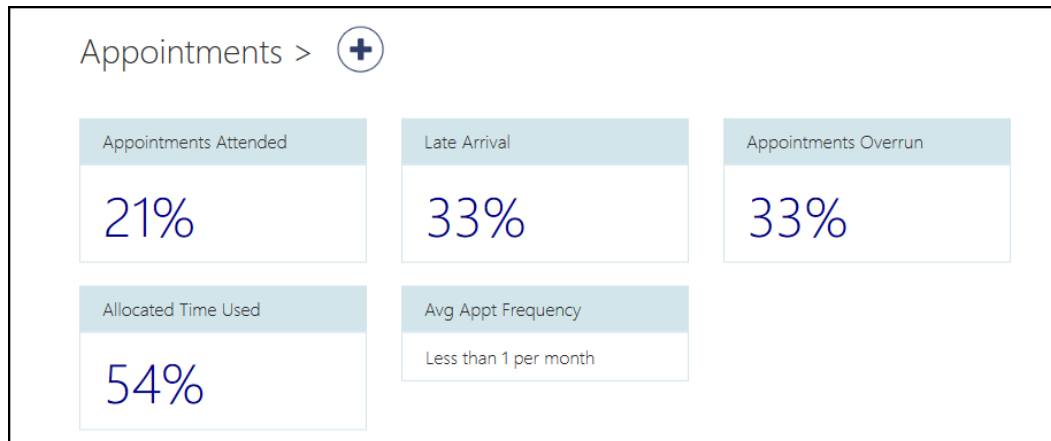
- **Patient Management** - The patient management information now all display together on the **Patient Details View**:

Select the arrow

DNAs (the last 6 months) >

to view full details and filter as required:

DNA Appointments There are 11 appointments from the last 6 months.

Only show historical appointments in: the last 6 months ▾   Enter text to filter results...

Type | Date/Time ▾ | Book Owner | Book Owner Gender | Slot Type
Cancellation Reason | Practice

Type	Date	Time	Book Owner	Slot Type	Comments / Cancellation Reason
DNA	Wed 04-Mar-2020	09:40	Jane Clark
Local Practice	Routine	
DNA	Wed 04-Mar-2020	09:00	Dr Anthony Salisburie
Local Practice	Telephone Appt	
DNA	Mon 17-Feb-2020	14:10	Dr Elizabeth
Local Practice	Emergency 3	d
DNA	Tue 21-Jan-2020	09:35	Dr Anthony Salisburie	mags test1	v

Filters

- **Searches** - You can now filter the results returned in the following screens:
    - Patient Search
    - Legacy Patient Search
    - Special Booking Search

Remember - You can access these screens by either just starting to type or by selecting the **<F3>** key.

using, depending on the screen:

- **Only show historical appointments in** - Select the time frame required
- **Enter text to filter results** - Enter free text to search
- **Predefined filters** - The blue filter options which vary depending on the screen

Select time frame here   Enter free text here

Only show historical appointments in: the last 6 months ▾   Enter text to filter res...

Type | Date/Time ▾ | Book Owner | Book Owner Gender | Slot Type
Cancellation Reason | Practice

Select Filter type

Appointments Preferences

- **Label Printing** - You can now set up a label printer to print appointment labels from a **Booking form**.

    See Setting up a Label Printer on page 7 for details.

Book + Print

    Once a printer is set up, you can select **Book and Print** from any Booking form to print an appointment label.

Disaster Recovery

- **Exporting Appointments** - You can now export your Appointments list in one of two formats so that should you experience any network issues, you can still see the details of the selected day's bookings. The formats are:
  - PDF - An easily printable file
  - CVS - A Microsoft Excel spreadsheet file

  Any available appointments display blank so you can enter additional patients if required.

General

- **Services** - Appointments relies on a connection to your Vision 3 services, you can now see the status of your services at a glance in the top right corner of your screen:

  - The green light indicates you are connected.

  - The red light indicates a problem with your connection.

  If you lose your connection, you can still:

  - Check in a patient
  - View the current appointment books

Exporting Appointments

To enable you to run your surgeries and clinics in the event of network issues, you can now export your Appointments lists in to either PDF (printable) or CSV (Microsoft Excel) format.

To export appointments:

1. From the **Reception** view, select **Options** ⋮.
2. Select **Export Appointments**.
3. The **Export all appointments** screen displays:
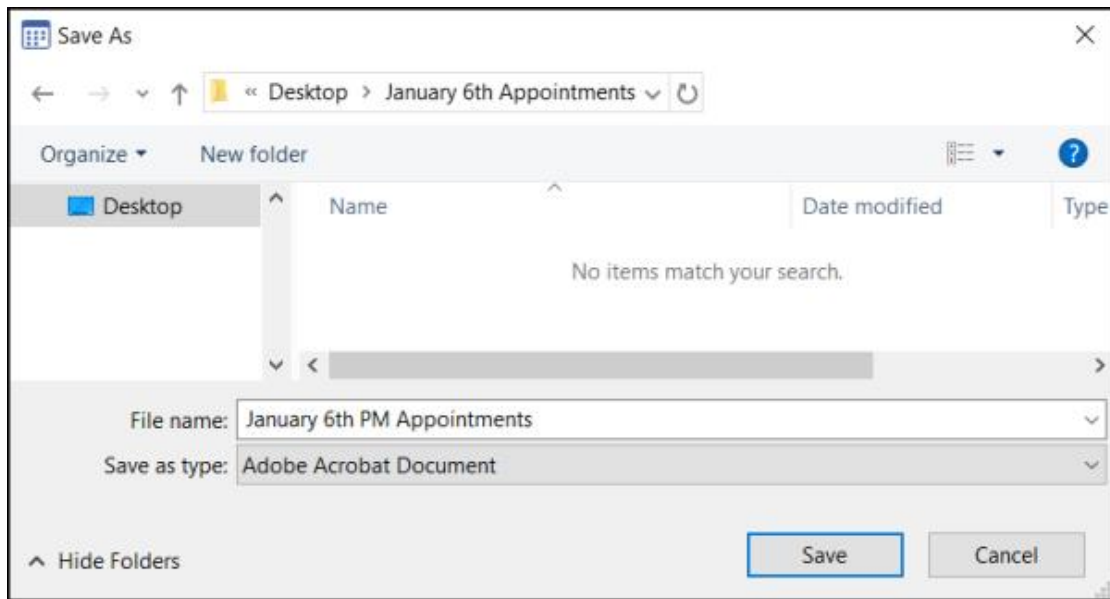
> ### Export all appointments
>
> As no filter(s) have been applied all appointments will be shown.
> Selecting 'Yes' will export all appointment books.
>
> Select Export Type: ☑ PDF ☐ CSV
>
> ☐ Do not show again ☑ Show Comments
>
> **Yes** **Cancel**

4. Complete as follows:

- **Select Export Type** – Select from:
  - **PDF** – Tick to create a printed list
  - **CSV** – Tick to export the appointments into an Excel spreadsheet
- **Do not show again** – Tick to skip this screen in future
- **Show Comments** – Tick to include any appointment comments in the export

5. Select **Yes** Yes to start the export.
6. The **Save As** screen displays, select where to save the file to and give it a name:

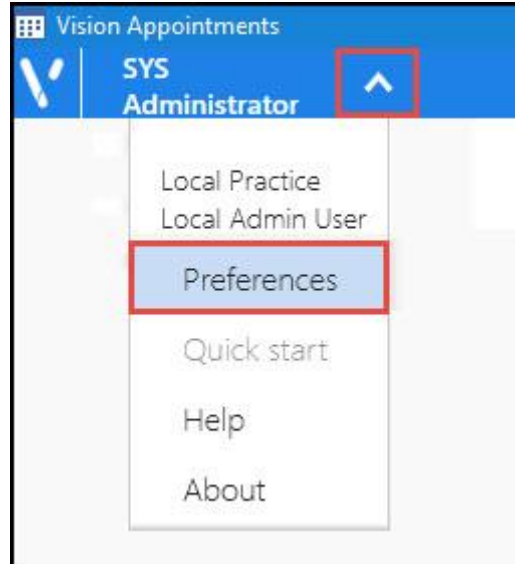6. The Export Complete screen displays, select **OK** to close.
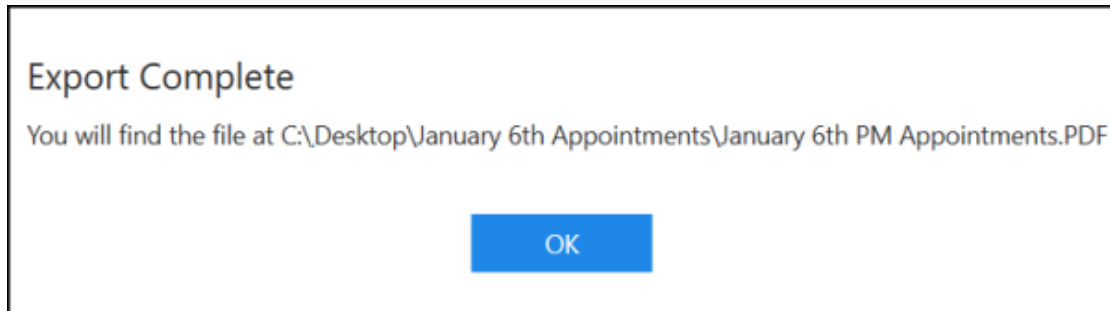
Note - Applying a filter and completing the above steps allows you to export a custom range of appointments.

Setting up a Label Printer

To set up a label printer so you can print Appointments labels:

1. From **Vision Appointments**, select the arrow next to your name and select **Preferences**.

2. The **Appointments Preferences** screen displays, select **Label Printing**:

3. Complete as required:

- **Practice default** - Select the default printer required
- **User override** - Select a different printer if you want to print elsewhere
- **Footer text** - Enter any text you want to add to the bottom of the Appointment label, for example, opening hours or branch address

4. Select the back arrow to close the **Appointments Preferences** screen.
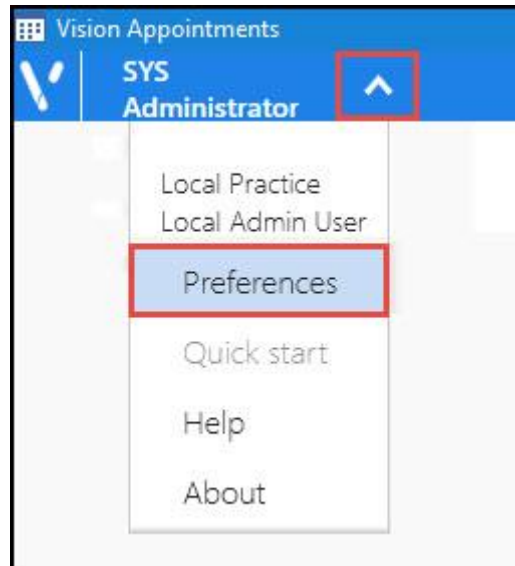
Note - To remove a selection, select **Clear** .
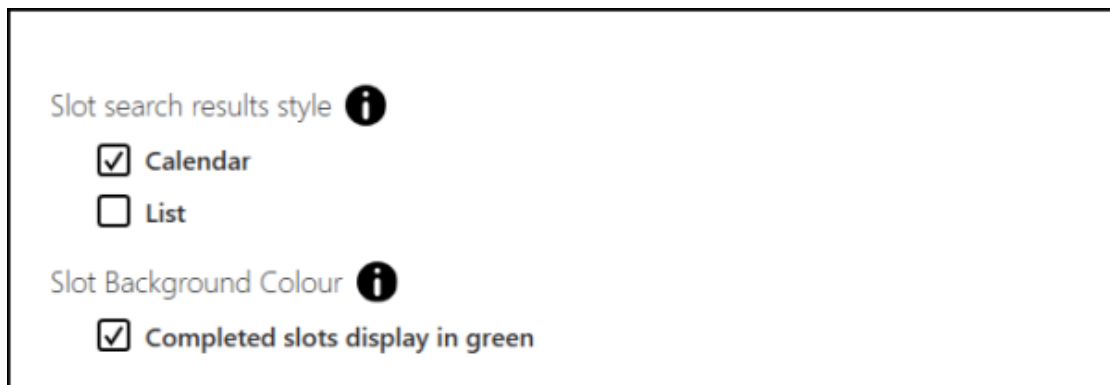
Preferences - Display Options

You can set your display options from the **Display Options** screen in **Preferences**.

To set up your options:

1. From Vision Appointments, select the arrow next to your name and select **Preferences**.

2. The **Appointments Preferences** list displays, select **Display Options**:

3. Complete as required:
   - **Slot search results style** - Select how you want your search results to display from:
     - **Calendar** - Tick to select
     - **List** - Tick to select
   - **Slot Background Colour**
     - **Completed slots display in green** - Tick to display completed slots in green:
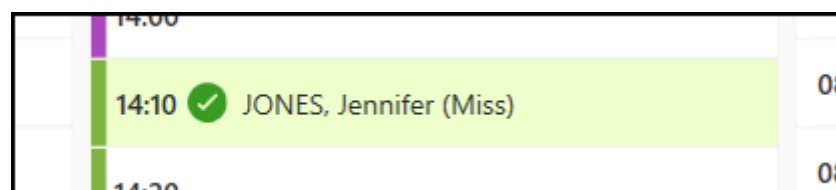
4. Select the back arrow to close the **Appointments Preferences** screen.

Note - To remove selections, select **Reset** .