# Vision Appointments Release v2.3

Vision Appointments release v2.3 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** [icon] - **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** [icon] - **Refresh setup data** to update the Appointments App with the changes.

## Vision Appointments

**Making and Managing Appointments**

- **Day View** - You can now see an expanded view of a specific book owners day. Hover over the book owner required, select **Options** [icon] and then select **Show Day View**:



- **Saved Views** - You can now set up and use Views for groups of book owners within the **Reception** screen. To define and use a View:

    1. From the **Reception** screen, define the group you require using the **Filter** [icon].

    2. Select **Save** [icon] entering an appropriate name for the group, for example, GPs.

    3. From the far left of the screen, select **Add a new 'View'** [icon] and select the view you require.

    4. The views you select display above the appointments, enabling you to quickly and easily switch between views:
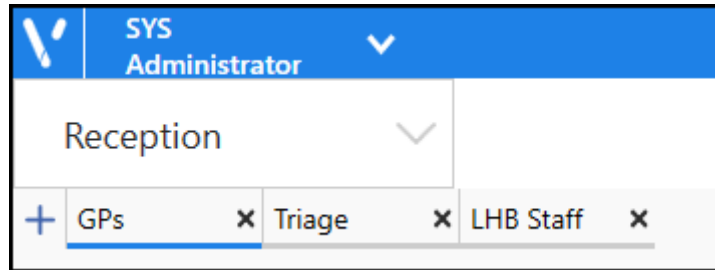
**Note** - This setting is retained for you.

- **Date of Birth Search** - You can now search on a patient using a six digit date of birth, DD/MM/YY.

  **Important** - The search only returns patients born within the last 100 years, for example, 05/05/19 is assumed to be 2019, if you are looking for 1919, you must enter the full year.

- **Slot type indicator** - Based on customer feedback, we have made the colour band used to indicate the slot type wider.

- **Completed Slots** - From **Preferences - Display Options**, you can now select to display completed slots with a green background:



- **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.
- **Clipboard** - You can now delete items from your clipboard. From the **Clipboard** , simply select **Delete**  on the item you no longer require.

**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** - The total number of appointments the patient has had that have overrun
    - **Allocated Time Used** - How much time the patient has used in appointments, in the last 6 months
    - **Average Appointment Frequency**
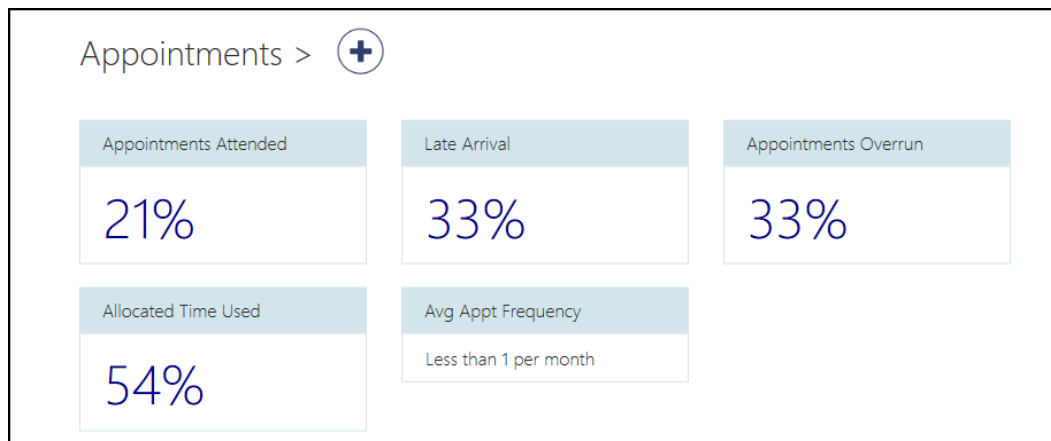


- **Patient Management** - The patient management information now all display together on the **Patient Details View**:

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.

### Filters

- **Searches** - You can now filter the results returned in the following screens:
    - Patient Search
    - Legacy Patient Search (transferred out patients)
    - 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 vary depending on the screen



### Appointments Preferences

- **Concurrent bookings** - You can now select to stop appointments being booked for the same patient, at the same time with more than one clinician. From **Preferences - General**, simply tick **Prevent concurrent appointments**.

- **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 6 for details.

    Once a printer is set up, you can select **Book and Print** **Book + 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
    - **CSV** - 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 amber light indicates a problem with some of your services.

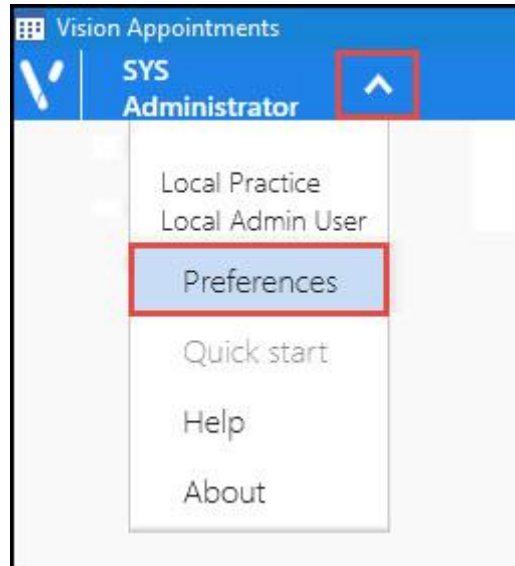    -  The red light indicates a problem with your connection.

If you lose your connection, you can still:

- Check in a patient
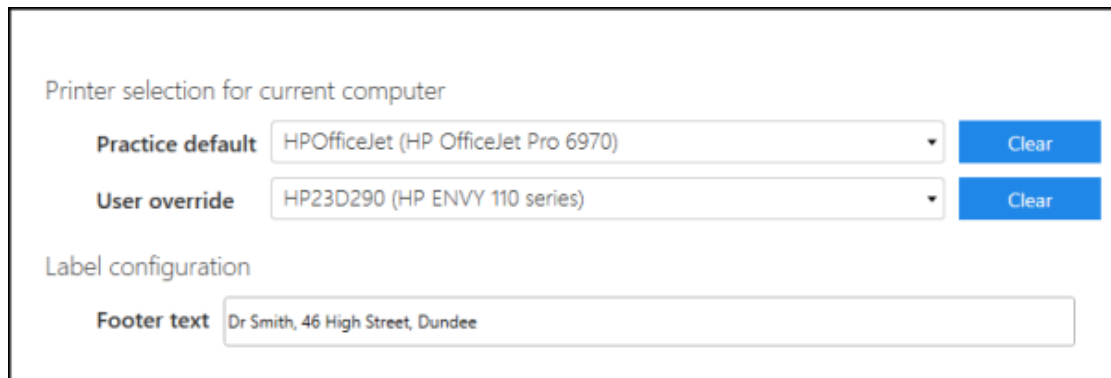- View the current appointment books

# 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**.



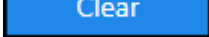2. The **Appointments Preferences** screen displays, select **Label Printing**:



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.

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**Note** - To remove a selection, select **Clear** .

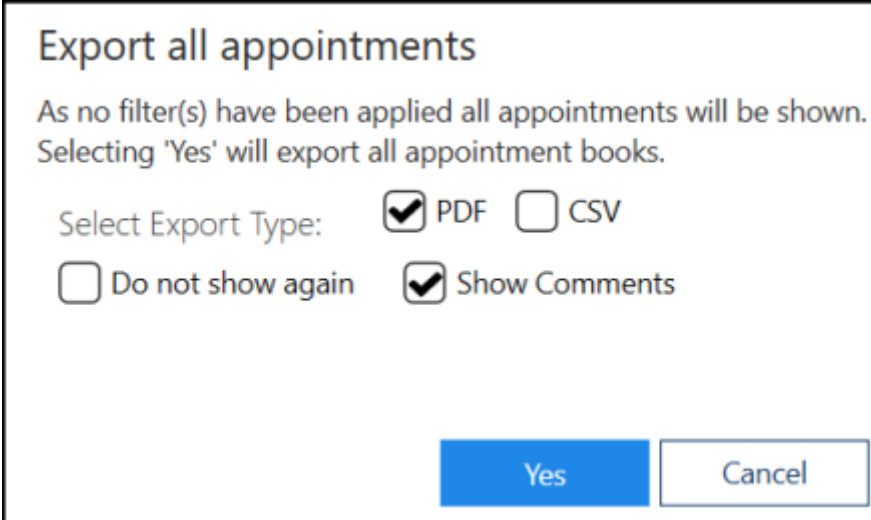## Exporting Appointments for Business Continuity

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.

You may want to run this each evening for the following day.

To export appointments:

1.  From the **Reception** screen, select the day required

2.  Select **Options** ⋮ and then **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:
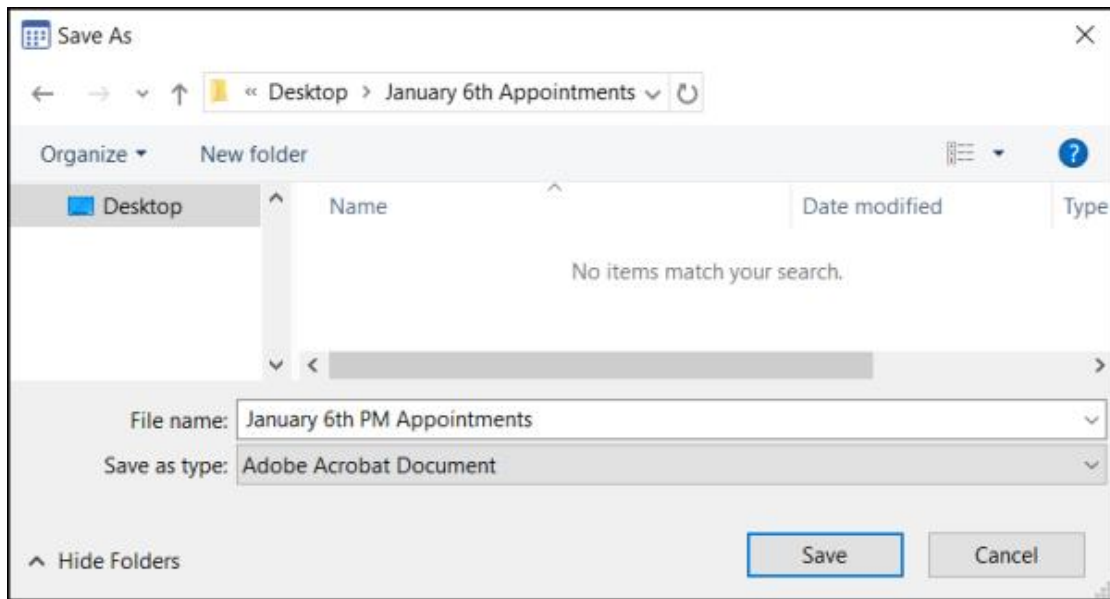
6. The **Export Complete** screen displays, select **OK** to close.
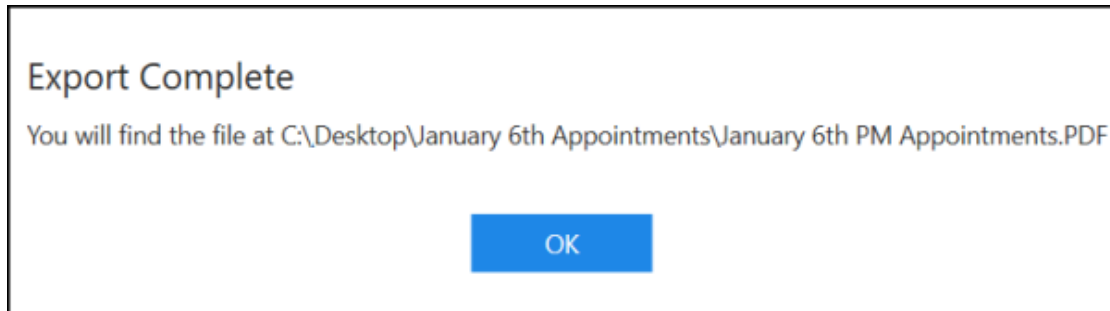


**Note** - Applying a filter and completing the above steps allows you to export a custom range of appointments. See Apply or Edit Filters.