Appointments - Help Guide

Version 2.1

Tuesday, December 3, 2019

Table of Contents

Accessing Appointments

Access the Appointments app from the New Appointments button on the main Vision 3 menu.

The app is designed for the front reception desk, offering quick intuitive functions for booking in patients, making/rescheduling appointments, along with inserting and deleting sessions.

The back office functions such as extending books are carried out in Appointments Setup, or Vision 3 if you have not yet switched over.

Appointments Explained

This section explains the different Appointments solutions within Vision and which version performs each function:

- **Vision 3 Appointments** – The core Vision appointments module where historically you have managed all aspects of your practice appointments.
- **New Appointments App** – The new intuitive Appointments solution from Vision. We are encouraging all customers to use this new app.
- **Appointments Setup** – The new app allowing you to quickly and simply manage your appointments books.
  See - Appointments Setup.
- **Shared Appointments - Vision Data Hub** – The unique solution used by federations and clusters to share appointments across organisations. This is also compatible with EMIS Web.
  See - Shared Appointments.
- **Online Services Patient Website** – The patient facing website where patients can book, cancel and review their appointments. They can also request medication, view their patient record and send messages to your practice.
  See - The Hive for further information.

The following table explains what you can and can't do across the different appointments solutions:

Function	Vision 3	New Appointments App	Back Office App	Shared Appointments	Online Services Patient Website
Manage Appointments Bookings	✓	✓	✗	✓	✓
View shared Appointments across organisations	✗	✗	✗	✓	Patient website if configured.
Configure shared appointments	✓	✗	✓	✗	✗
Set up new staff	✓ – Control Panel	✗	✗	✗	✗
Add new Book Owner	✓*	✗	✓	✗	✗
Create Session	✓*	✗	✓	✗	✗
Create weekly plan	✓*	✗	✓	✗	✗
Extend/Modify Books	✓*	✗	✓	✗	✗
Online Services	✓*	✓	✓	✗	✗

Appointment availability					
Online Services Appointments Configuration	✓	✖	✖	✖	✖
Run Appointments Reports	✓	✓	✖	✖	✖
Appointments Backup	✓*	✖	✖	✖	✖

✓* - If you have Appointments Setup enabled you can no longer do this in Vision 3, you have to use Setup.

Preferences Filter

A default filter can be set for your Appointments view.

1. Select the arrow next to your name at the top left of the appointments screen, and choose **Preferences** from the drop down list.
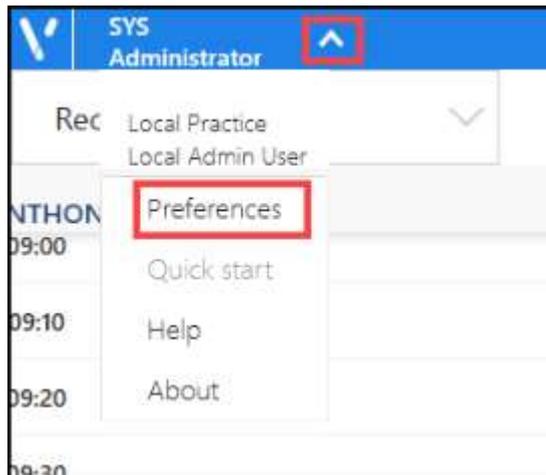
2. Select the **Filter** tab.
3. Select the drop down list and choose the required filter.
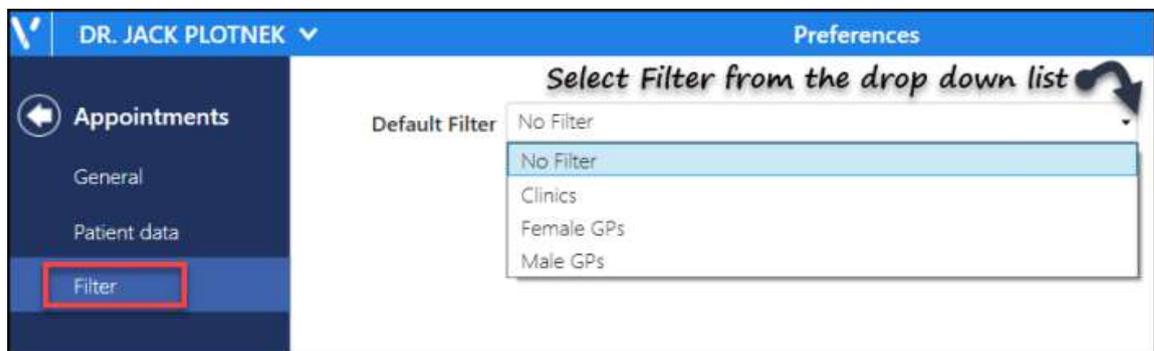
The filter applies as a default view.

4. Select the **Back** button to navigate back to your previous view.

Or if you want to undo what you have select the **Reset** button.

Preferences - General

The user **Preferences** allow you to customise both the individual and practice settings.

1. Select the arrow next to your name at the top left of the appointments screen, and choose **Preferences** from the drop down list.
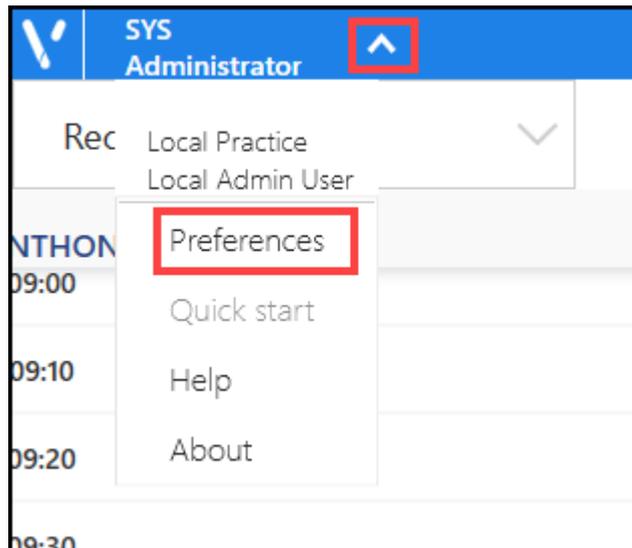
The **General Tab** displays, the settings here are practice wide settings.

2. **Timescale for slot retrieval**
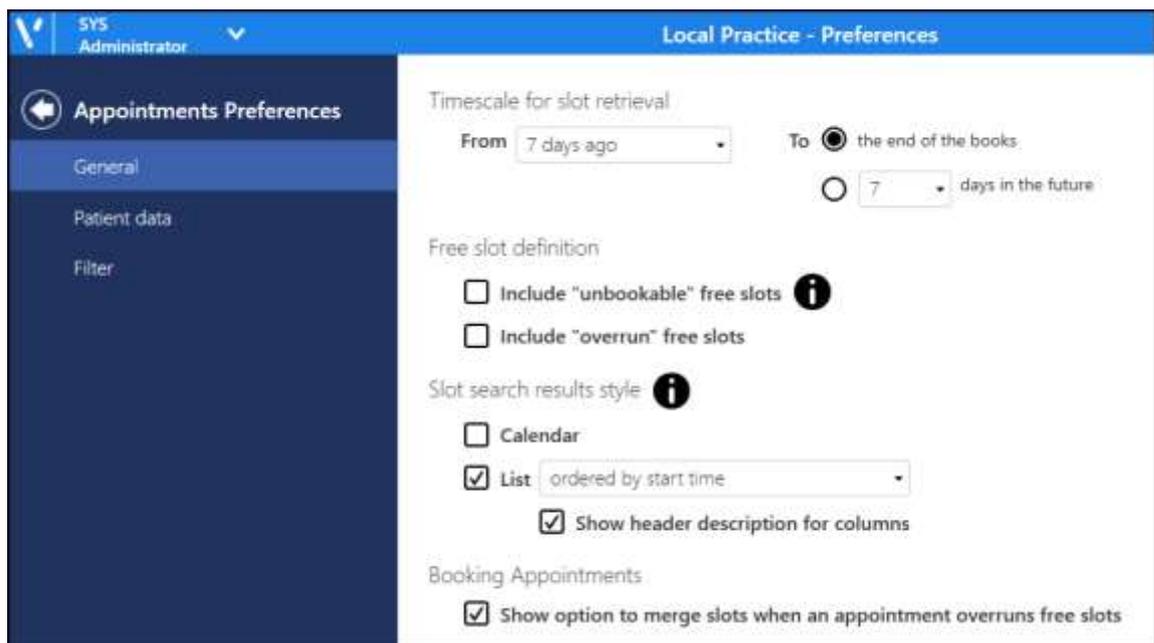
- **From** - Set how far in the past the back arrow on **Reception** view displays. Choose from today - 7 days from the drop down list.
  This is the default period for the initial loading of the appointments app, you can go further back using the calender.
  Note - Any slot over 7 days old cannot be edited.

- **To** - Set how far forward you want the books to display.
  Select between **To the end of the books** and a time scale of 7 - 42 **days in the future**.
3. **Free slot definition**
   - **Unbookable Slots** - Select to include free slots with a slot type that cannot be booked on the current day.
   - **Overrun Slots** - Select to include overrun slots in the free slot search.
     Note - The free slot definition affects the count in **Free slot search**.
4. **Slot Search Results Style**
   - **Calendar View**

     A view of free slots by clinician.

   - **List View**
     Ordered by **Start time** or a **Range of start times** on the selected date.

- The **Show Header Description** for columns option displays the **Owner** and **Session** headings.

5. **Booking Appointments**
Tick the **Show option to merge slots when an appointment overruns free slots** to display the option to combine slots.
See - Booking Multiple Consecutive Appointments on page 53.

6. Once you have set your preferences, select the back arrow [icon] to navigate back to the previous screen.

Or, if you want to revert to system settings select the **Reset** [Reset] button.

See - Free Slot Search - Overview on page 55, Preferences - Patient Data on page 13 and Preferences Filter on page 9.

Preferences - Patient Data

To access the **Patient Data** tab in **Preferences**:

1. Select the arrow next to your name at the top left of the screen, and choose **Preferences** from the drop down list.
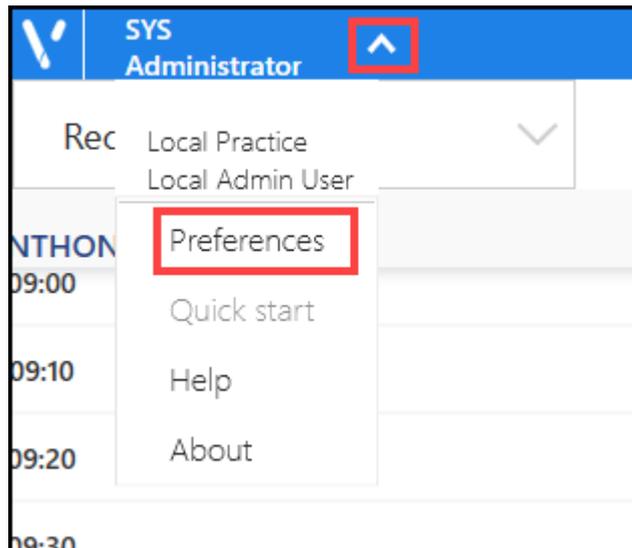
2. Select **Patient Data**.
   The **Patient data** tab displays.
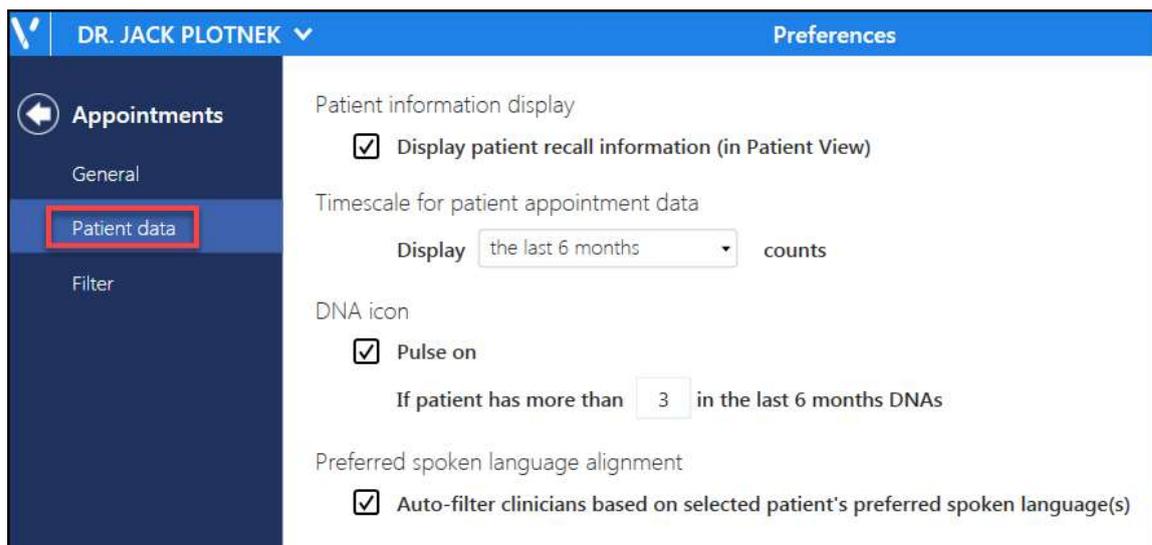
3. **Patient Information display**

   Select to display patient recall information in the **Patient Details** view.

4. **Timescale for patient appointment data**

   Choose from a date range from the last 3 months up to the last 5 years, to define the appointment history displayed in the **Booking Form** and **Patient Details** view.

5. **DNA Icon**

Activate and define the number of DNAs in the last 6 months to trigger the alert in the **Booking Form**.

6. **Preferred spoken Language**

   Defaults the filter selections to the spoken language preference of the patient when an appointment is made in the **Patient** view.

7. Select the back arrow to return to previous screen.

   Or, if you want to revert to defaults, select the **Reset** [Reset] button.
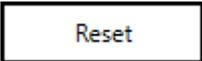
Note - all of the settings within the **Patient data** tab in **Preferences** are practice wide.

See - .

Accessing Patient Details View

The Patient view can be accessed in several different ways:

Reception View

From a booked appointment, hover on the slot to activate the **Options** menu to the right of the patient's name, and choose **Open patient details** from the drop-down list.
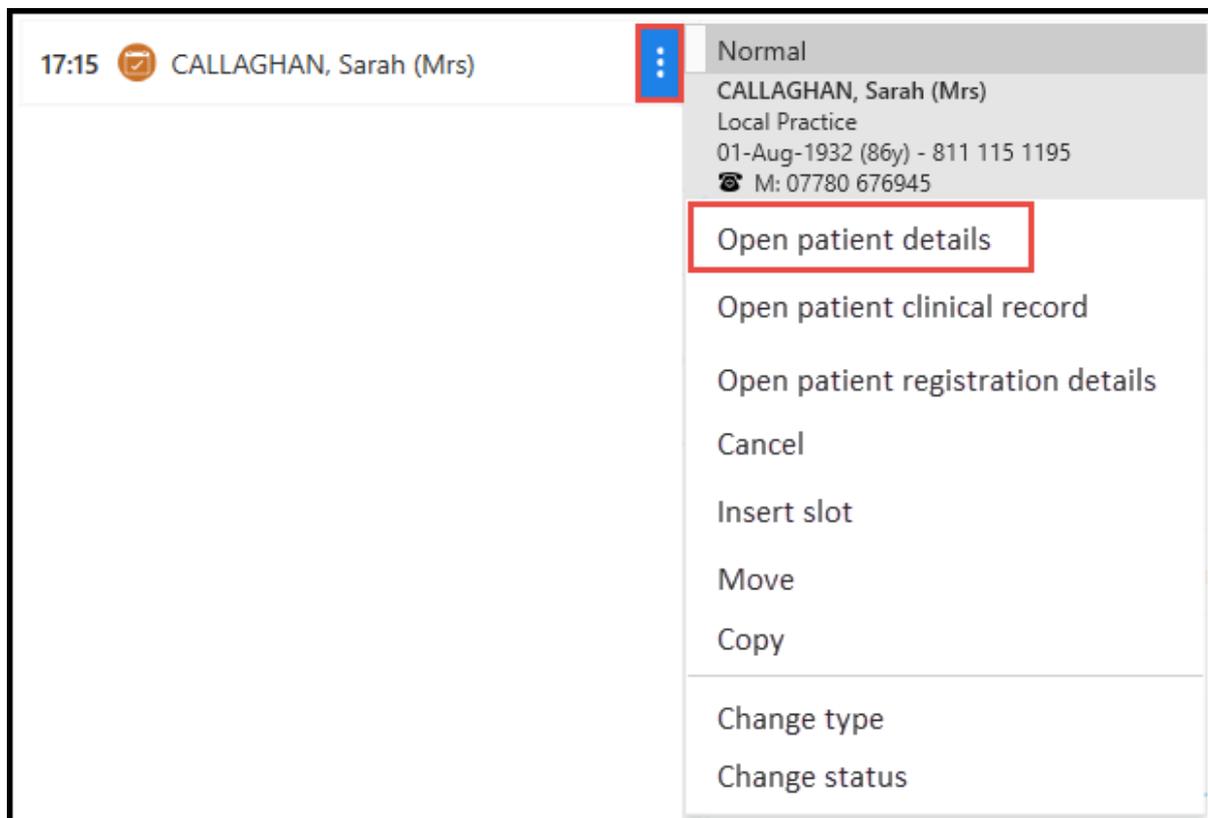
Current Appointments View

From a booked appointment, select the patient's name.

Patient Select

1. From the **Reception** view start typing the patient's name, and the search box displays.

2. Enter the patient's name. See - .

3. Select **Search** 🔍.
   The results display.

4. Select the patient from the list.
   The **Patient Details** view displays.

Booking Form

Select the patient's name on the **Booking form** to open the **Patient Details** view.

You can also select **DNA**/**Scheduled**/**Completed** or **Cancelled** buttons to view the relevant appointment history in Patient Details view.
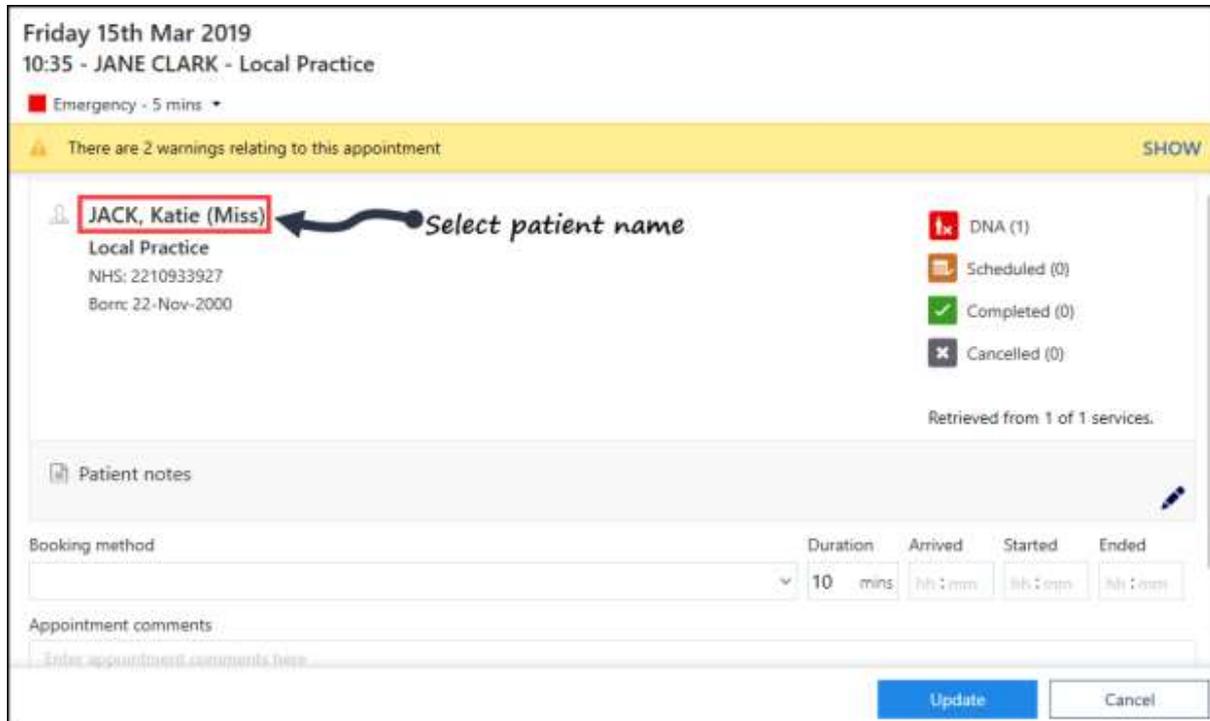
See - .

Patient Details View - Making Appointments

1. Open **Patient** view. See - Accessing Patient Details View on page 15.

2. Select **Add Appointment** ⊕ button.

   Note - The **Add Appointment** button is not available if you have accessed the Patient Details view via the **Booking Form**.

   The **Reception** view displays, with a selected patient message.

Booking appointment for	HAIGH, Martine (Mrs)	
Registered at	V15-APPTS	
with	Dr Susan Somerset	DISCARD
Usual GP	Dr Susan Somerset	

3. Select an appointment.
   The patient details automatically populate into the booking form.

4. Optionally, add any appointment comments and update the booking form.

5. Select **Book** Book button.
   A booking confirmation message displays.

   Appointment for 'SMITH, Clarice (Ms)' on Tue 26-Feb-2019 at 14:00 with 'JACK PLOTNEK' at 'Local Practice' has been booked. ⊗
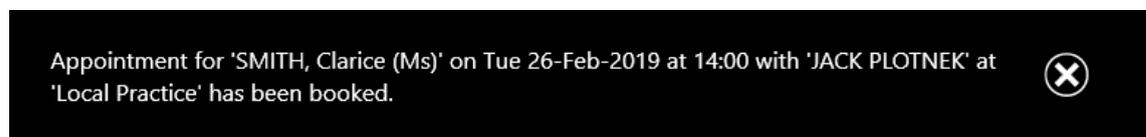
Note - If a suitable appointment cannot be found, the selected patient message box has a discard option to cancel the selected patient.

Integration with Vision 3

Appointments 2.1 is integrated with Vision 3 through:

- **Consultation Manager**
- **Registration Links**

Integration with Consultation Manager

To open a patient's details in **Consultation Manager**, from the **Reception** view:

1. Hover over the desired patient from the scheduled appointment list.
2. Select **Options** [⋮].
3. Select **Open patient clinical record**.
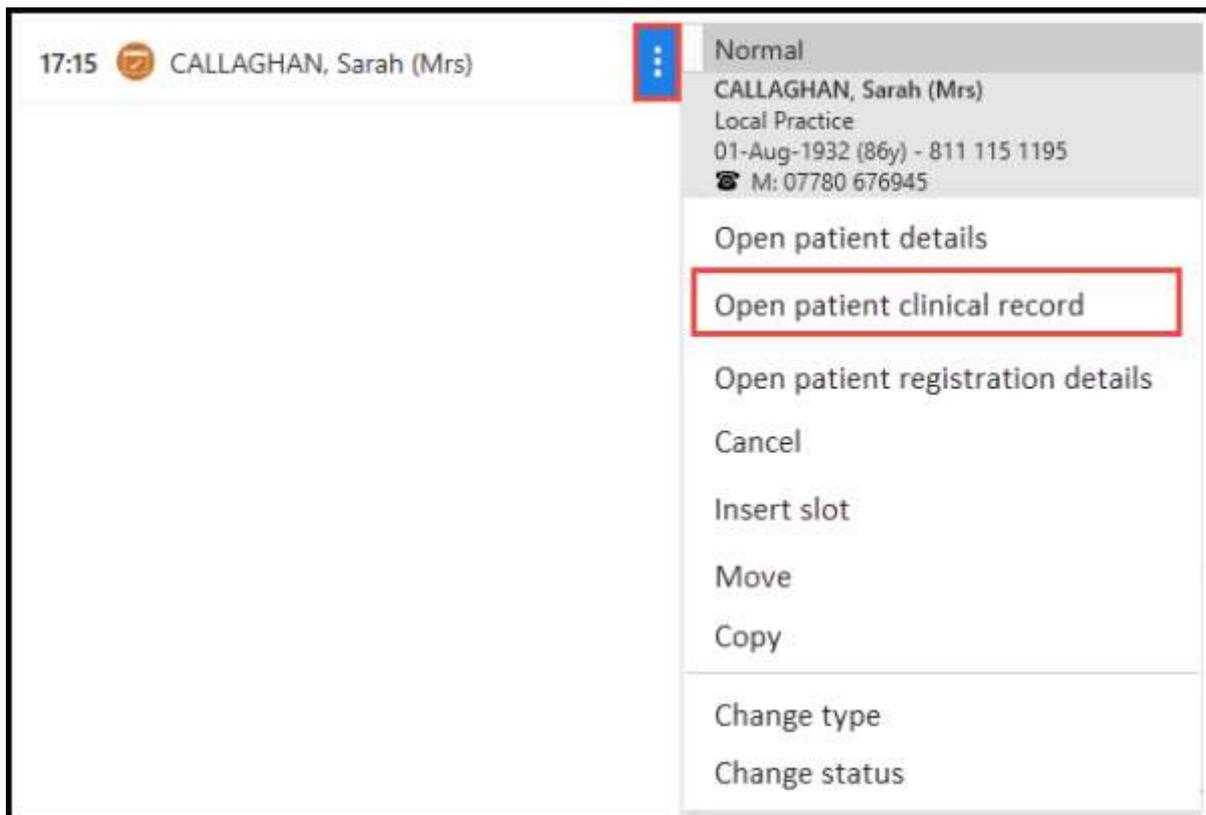
4. The patient's clinical record displays in **Consultation Manager**.

Integration within Registration

To open a patient's details in the **Registration** module, from the **Reception** view:

1. Hover over the desired patient from the scheduled appointment list.

2. Select **Options** ⋮.
3. Select **Open patient registration details**.
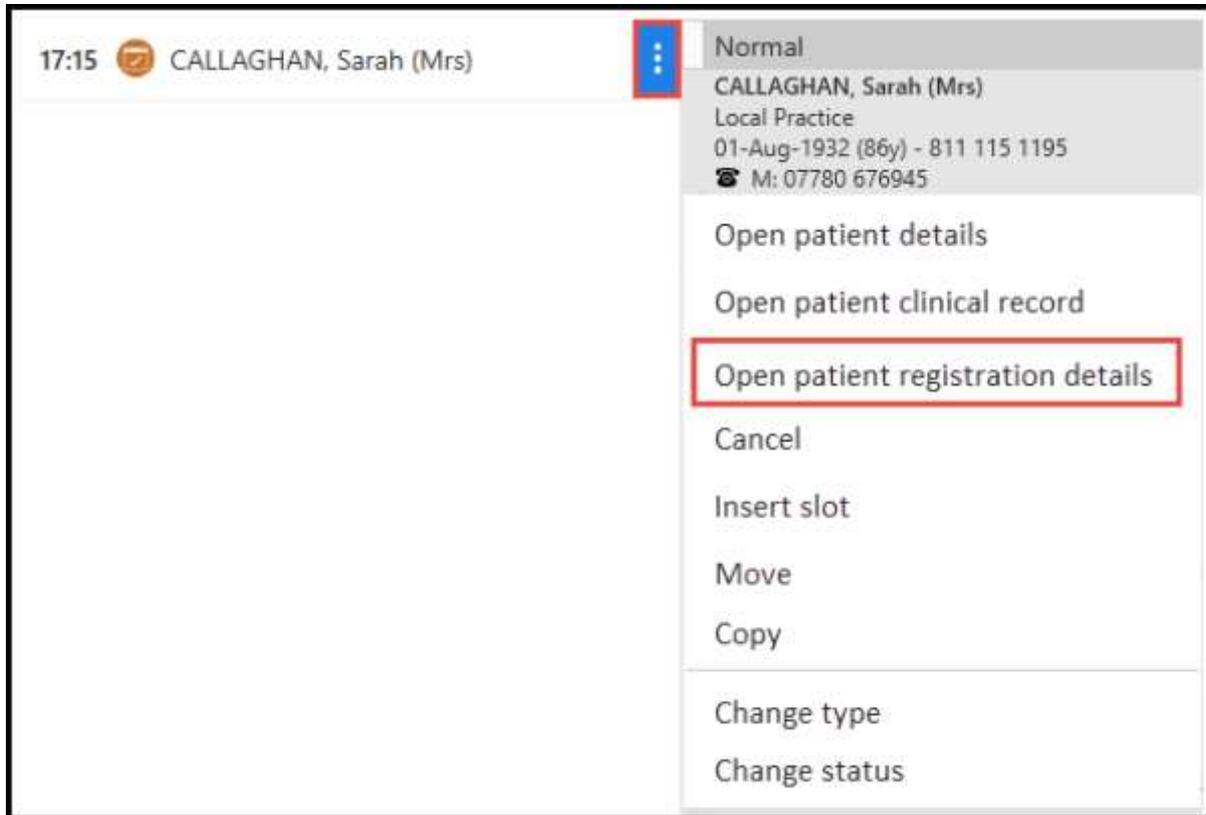
4. The patient's details display in the **Registration** module within Vision 3.

Patient Details View - Contact Details

From the **Patient Details** view, you can add and edit a patient's **Contact Details** and **Patient Notes**.

Add or Edit Patient Details

1. Select the patient and open the **Patient Details** view.
    See - Accessing Patient Details View on page 15.

2. Select **Edit** in the **Patient's Contact Details** header to update or add contact details.
3. Select an existing contact to update or add comments.
    To add a new contact, select from the **Type** drop down list.

4. Enter/edit the number or email address.
    A red highlights displays, and the format detailed below.

5. Optionally, enter/edit any **Notes**, for example, ring after 3pm.
6. Select **Add** to record/update the contact.

7. Select **Save** to complete.
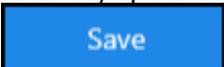
Patient View - Patient Notes

The **Patient Notes** field contains recurring relevant information about the patient, this displays on all their appointments.

For example, hard of hearing.

Hover over the appointment to see the **Patient Notes**.

To Add or Edit a Patient Note

1. Open **Patient Details** view. See - Accessing Patient Details View on page 15.

2. Select **Edit** [pencil icon] in the **Patient's Notes** header.
3. Update or add the information into the free text box.

4. Select **Save** [Save button].

5. Select the [back arrow icon] back arrow to return to the previous view.

See - Patient Details View - Overview on page 24.

Patient Details View - Appointments

The **Patient Details** view details an individual patient's future and historical appointments.

Each heading in the **Appointments** section displays a maximum of 5 appointments, further appointments can be accessed by selecting the arrow **>**.

The view is split into:

- Future appointments
- Past appointments
- DNAs
- Cancelled appointments

The time frame for appointment history is defined in Preferences - Patient Data on page 13.

- **>** Displays full history for the category.

Use the drop-down list to change the time period:

- The last month
- the last 3 months
- the last 6 moth
- the last year
- the last 2 years
- the last 5 years
- the past

- Select the back arrow to returns to the **Patient Details** view.

Edit Past Appointments

When an appointment is more than 7 days old you are unable to amend the appointment.

Prior to this, the appointment can be edited, select the appointment to access the booking form and update accordingly.

See - Patient Details View - Overview on page 24.

Patient Details View - Overview

The **Patient Details** view can be accessed via:

- **Reception** view
- **Current appointments** view
- **Booking Form**
- **Patient Select**
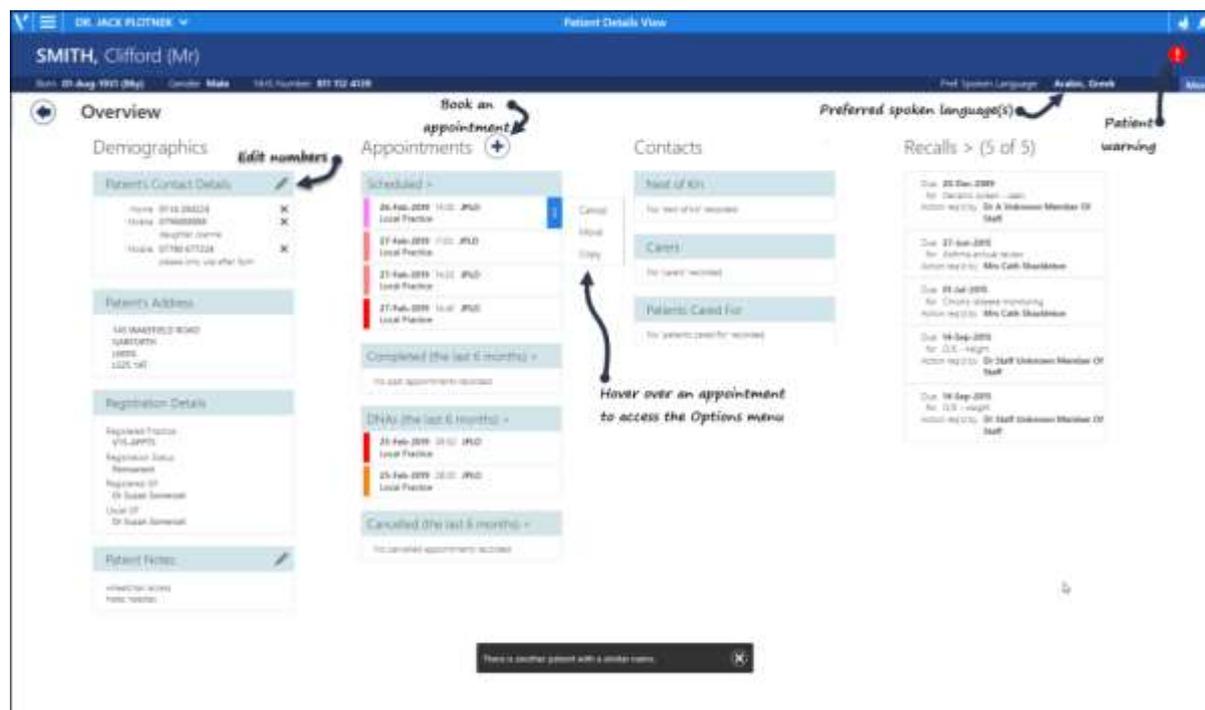
Patient Banner

- Date of birth
- Gender
- NHS/CHI Number
- Preferred spoken language
  See - Spoken Language Alignment on page 27.

Demographics

- Contact Details
  See - Patient Details View - Contact Details on page 20
- Address
- Registration Details
- Patient Notes
  Recurring notes that display with each appointment.
  See - Patient View - Patient Notes on page 21.

Appointments

- Make an appointment
- Scheduled appointments
- Completed appointments

- DNAs
- Cancelled appointments

Note - The time frame for these is set in Preferences - Patient Data on page 13.

Contacts

- Next of Kin
- Carers
- Patients Cared For

Recalls

- Outstanding recalls

See - Accessing Patient View.

Patient View - Recalls

To view a Patient's Recalls:

1. Open **Patient Details** view. See - Accessing Patient Details View on page 15.
2. Scroll across to the right of the screen where the last column displays the **Recalls**. Initially up to five recalls display.
3. To view additional recalls, select **Recalls >**.

4. Choose the back arrow to return to the previous view.

Note - If you can't see the Recalls column it might be that it has been disabled in **Preferences**. See - Preferences - Patient Data on page 13.

See - Patient Details View - Overview on page 24.

Spoken Language Alignment

The **Patient Details** view displays the **Preferred Spoken Language** in the **Patient Banner**.
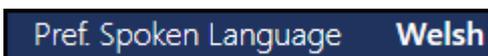
When you make an appointment via the **Patient Details** view for a patient with a preferred spoken language, this aligns the clinician's spoken languages with the preferences.

Note - This option needs to be enabled in Preferences. See - Preferences - Patient Data on page 13.

1. Open the **Patient Details** view - see Accessing Patient Details View on page 15.
2. Select **Add Appointment** .
    The **Reception** view opens.
    A selected patient message displays.

3. The view automatically filters the patient's preferred language against clinician's spoken languages.
4. Select an appointment.
    The patient details populate automatically.
5. Add any relevant appointment comments and patient related notes as required.
6. Select the **Save** button.

Filters

If you already have a filter set within **Reception** view, for example, Advance slots, the language alignment applies to the existing filter.

Therefore, if your patient speaks Welsh, and you choose **Add appointment** in **Patient View**, the filter updates to Advance slots for a Welsh speaking GP.
A filter remains until cleared by the user.

Filter before language alignment

Filter after language alignment
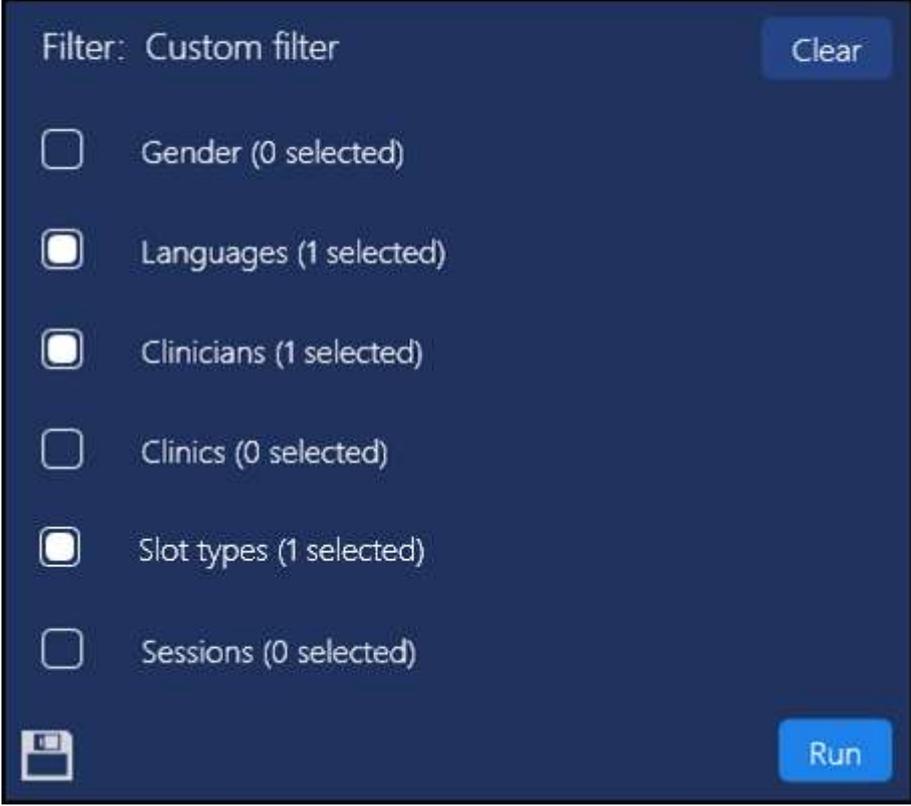
See -

Weekly View

To access the Weekly view:

1. Select the **drop-down** arrow to the right of the **Reception** view.
2. Select **Weekly**.
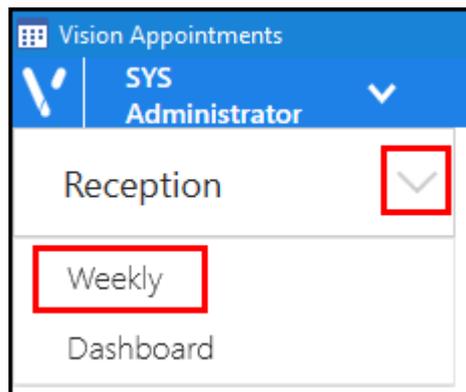
3. The **Weekly view** screen displays.
4. You can now choose a **Clinician** or **Clinic** and display their weekly view.
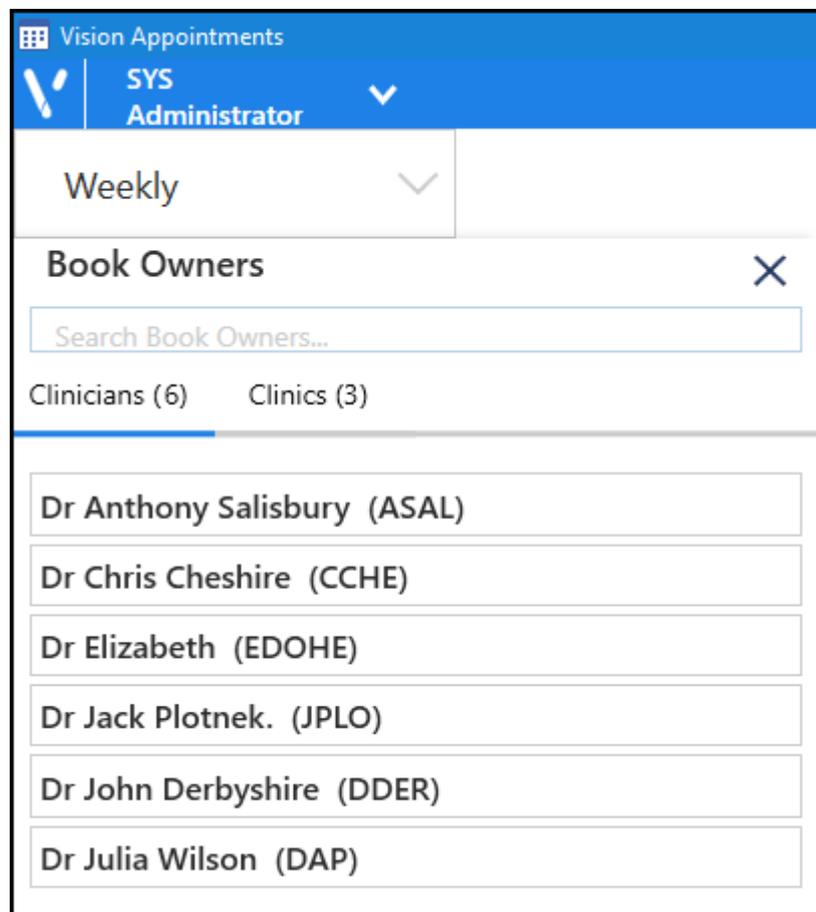
From the Weekly view, you can:

- Navigate to a Clinicians weekly view, see Navigating to a Clinicians Weekly View on page 33.
- Navigate to a Clinics weekly view, see Navigating to a Clinics Weekly View on page 35.
- Add a session, see Adding a Session from the Weekly View on page 32.

Adding a Session from the Weekly View

To add a session from the Weekly view:

1. Select **Options** [icon].
2. Select **Add session**.
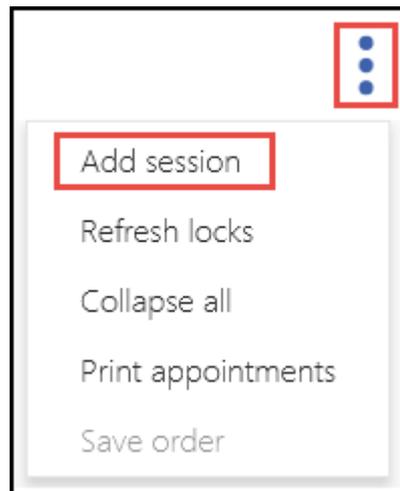
3. The **Add Single Session** screen displays.
4. Input all required information.
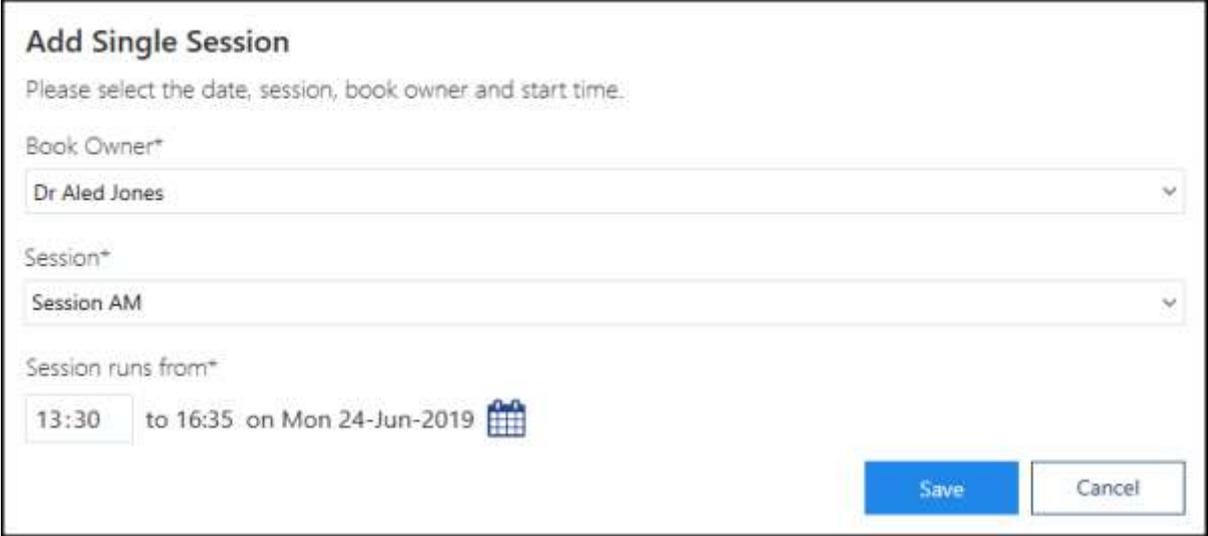
5. Select **Save** [Save button].
6. The session is added.

Navigating to a Clinicians Weekly View

To navigate to the Clinicians weekly view:

1. Select **Clinicians** | Clinicians (6) |.
2. Select or search for the desired clinician.
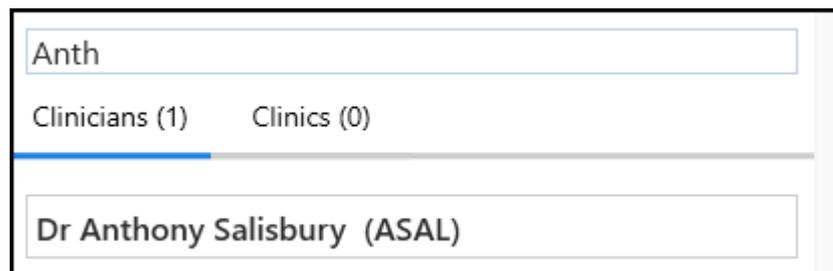
3. Their weekly view displays.
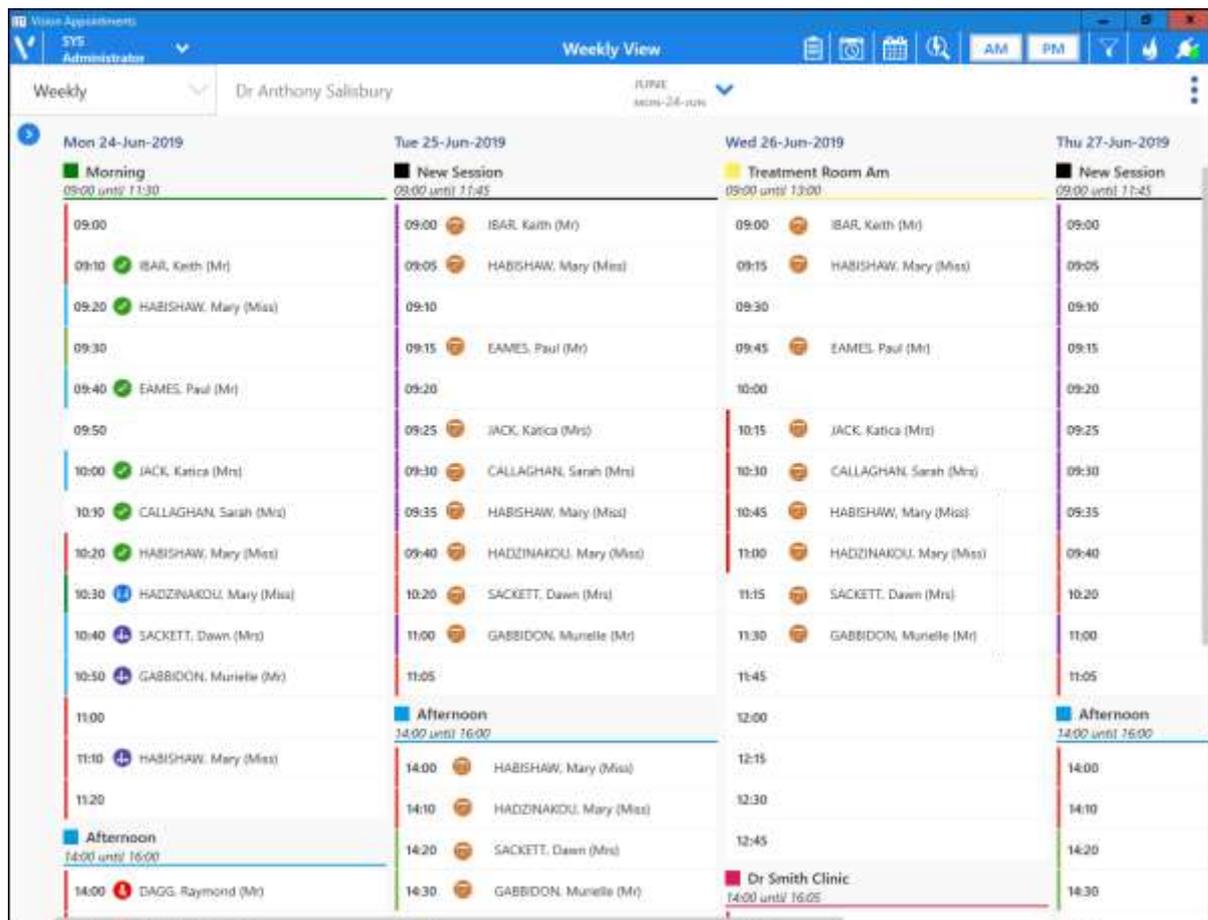
- Select **Options** | ⋮ | to reveal additional options.
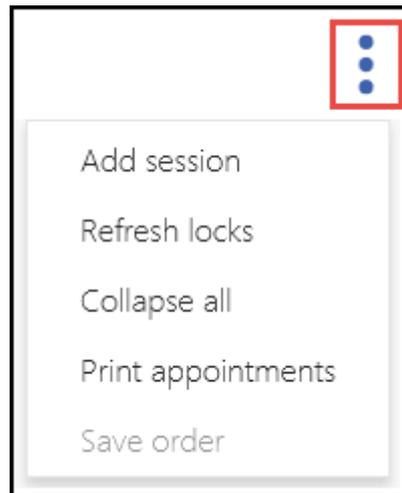
- Select to return to the previous screen

Navigating to a Clinics Weekly View

To navigate to the Clinics weekly view:
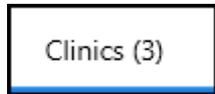
1. Select **Clinics** | Clinics (3) |.
2. Select or search for the desired clinician.
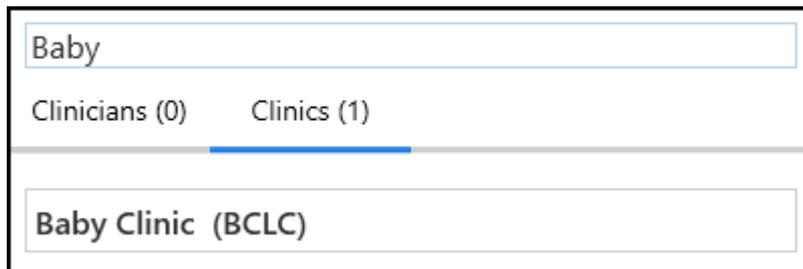
3. The weekly view displays.
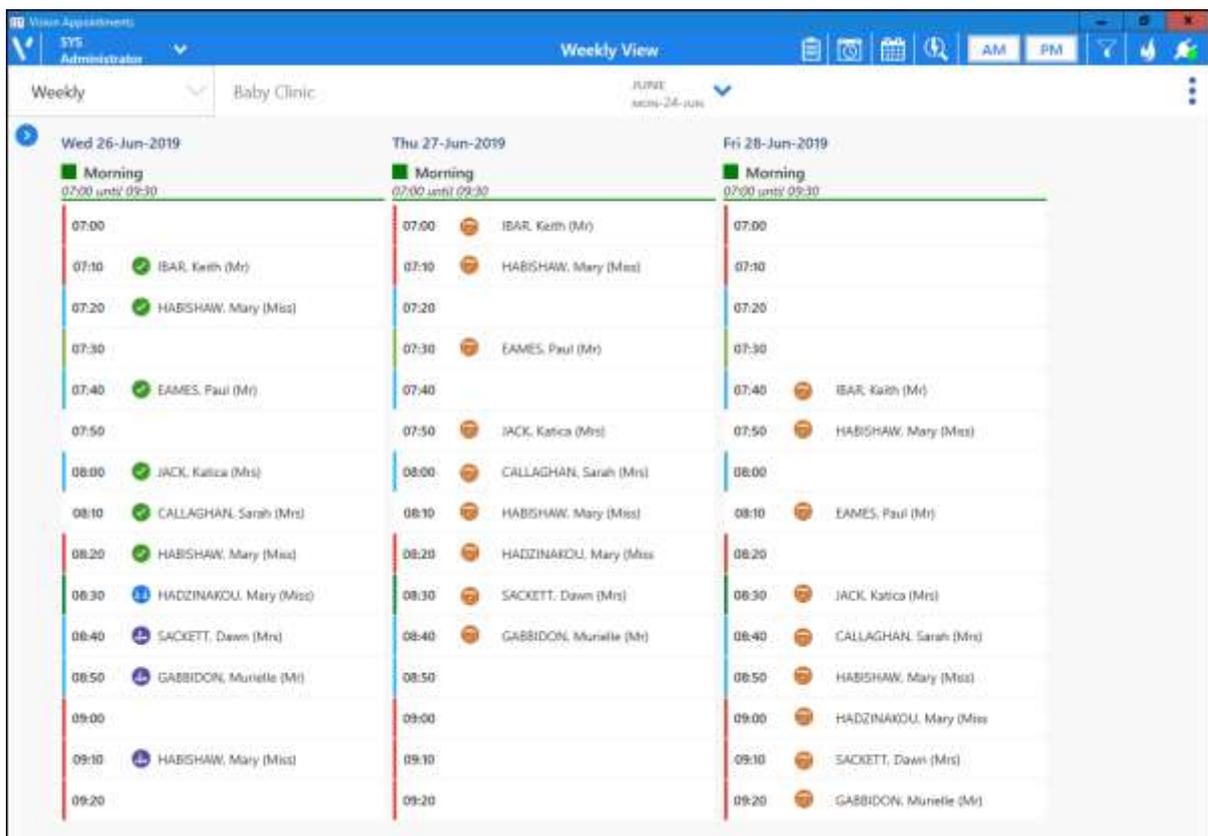
- Select **Options** to reveal additional options.
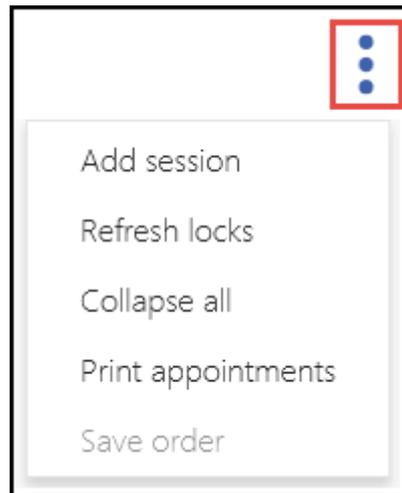
- Select to return to the previous screen

Appointment Views

Navigating the Appointments views

The default view is the **Reception** view, from here you can quickly access **Current Appointments** and **Dashboard** views.

Reception View

The **Reception** view displays all the clinician's sessions.
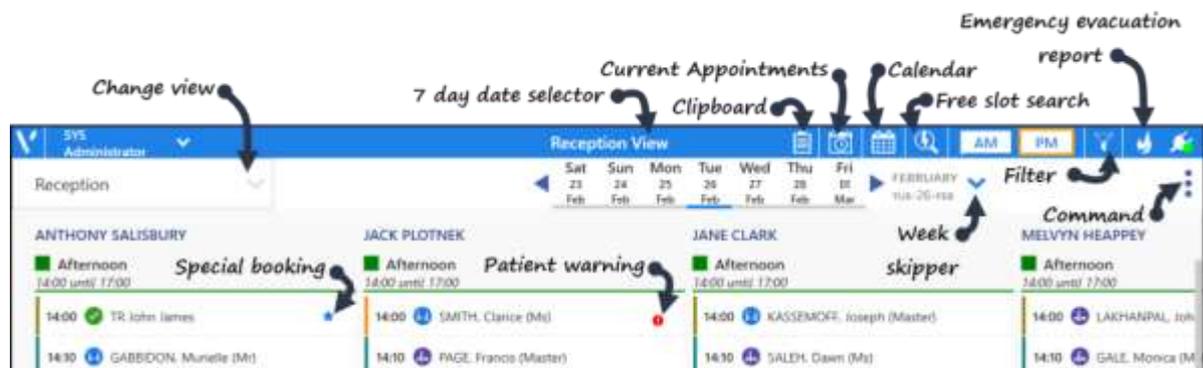
See - Reception View.

Current Appointments View

The **Current Appointments** view is designed for quickly checking patients in. This displays appointments for the next hour and any DNAs from the previous hour, along with any patients waiting or in consultation.

Once a patient has been seen, they are removed from the view.

See - Current Appointments View on page 40.

Free Slot Search

The **Free slot search** is accessible from the **Reception** view and is designed to show you only free slots, enabling you to quickly find available appointments.

Filters can also be applied to refine the view, and you can also search by slot duration.

See - Free Slot Search - Overview on page 55.

Dashboard View

The **Dashboard** view shows at a glance where each clinician is up to in their session.

See - Dashboard View on page 42.

Current Appointments View

You can navigate to the **Current Appointments** ![calendar icon] view from the **Reception** or **Dashboard** view.

The **Current appointments** view shows all booked appointments within the next hour, DNAs from the previous hour, along with any patients waiting or in consultation.

An appointment will show in this view if the status is:

- **Booked**
- **Arrived**
- **Waiting**
- **In Consultation**
- **Overdue**
- **DNA**

The view is designed for quickly checking patients in.

- Scroll up and down the **Current appointments** as required.
- Select the patient's appointment status to increment, for example, check in a patient.
  A count of the waiting time displays until the patient goes into their consultation.

- Apply a filter to refine the view.
  See - Apply or Edit Filters on page 80.
- Select outside of the view to close.

Appointments Details

- Select a patient's name to access the **Patient Details** view.
  See - Patient Details View - Overview on page 24.
- The appointment also displays Appointment Comments.
- Right click on a booked appointment to change slot type, change status, move, copy or cancel.
- Special bookings are indicated by a blue star.

See - Appointment Status - Overview on page 77.

Dashboard View

The **Dashboard** displays a high level overview of the appointments activity.

To access, select **Dashboard** from the **View** menu in the top left corner of the **Reception** view.
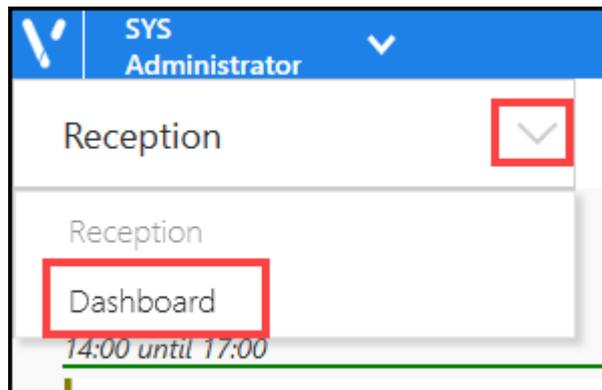
The **Dashboard** view maintains current the date from the **Reception** view.

- **Clinicians and Clinics**- appointments summary.
- **Breakdown of slots** - **Seen**, **DNA**, **Waiting**, **In Consultation**, **Arrived** and **Free** appointments.
  The colours on the screen follow the same format as the appointment status.

Colour	Defini...
Green	Seen
Blue	In cons...
Purple	Arrived
Pink	Overdu...
Red	DNA
Grey	Free Slo...
Empty white space	No clini...

Key

- Free
- Booked
- Did Not Attend
- Overdue
- Arrived
- In Consultation
- Seen

- **Patients waiting and in consultation** - count by clinician.

Jane Clark

In consultation, 1 waiting

- **Patient Details** - select the **+Expand all** option at the top of the column, to see which patients are waiting or in consultation.

Anthony Salisbury

- PAGE, Francis (Master)
- GABBIDON, Murielle (Mr)
- STAINES, Christopher (Mr)

Use the **View** menu to return to the **Reception** view.

See -

Navigating the Reception View

Hover over an appointment slot to activate the **Options** ⋮ menu, the content changes depending on how it is accessed and if the slot is free or booked.

Booked Appointment - Left Click
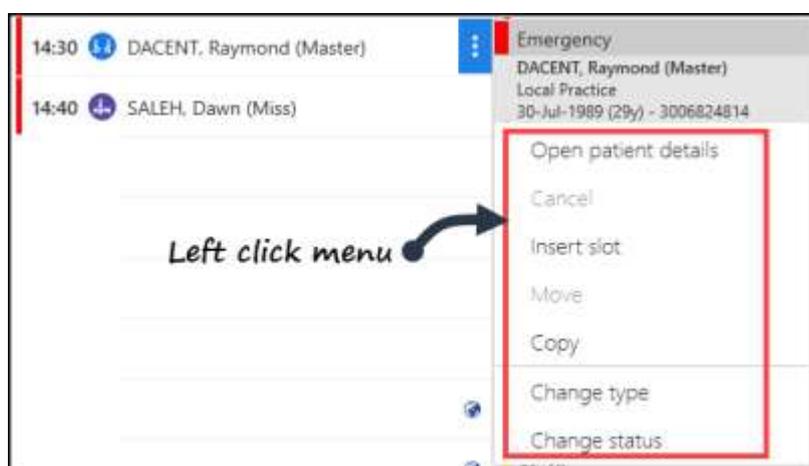
- **Open patient details**
  See - **Patient Details Vie**
- **Cancel an appointment**
  See - **Cancel an Appointm**
- **Insert slot**
  See - **Insert Slots on pag**
- **Move appointment**
  See - **Move Appointment**
- **Copy appointment**
  See - **Copy Appointment**
- **Change slot type**
  See - **Change Slot Types**
- **Change status**
  See - **Appointment Statu**

Booked Appointment - Right Click

The right click option can be used on single or multiple appointments, the selected slots display in a pale blue highlight.
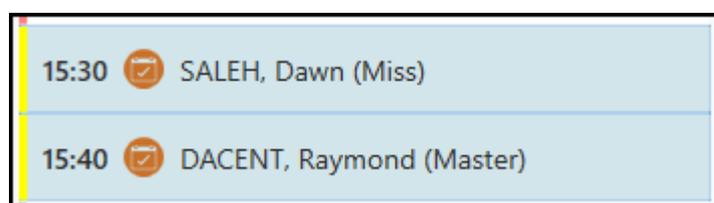
The toolbar activates with the same options as the left click menu with the exception of **Open Patient details** which is not available.

Free Slot - Left Click

- **Insert slot**
  See - Insert Slots on page 73.

- **Hold slot**
  See - Hold Slots on page 72.
- **Change slot type**
  See Change Slot Types on page 69.
- **Delete slot**
  See - Delete Slots on page 71.
- **View Clipboard**
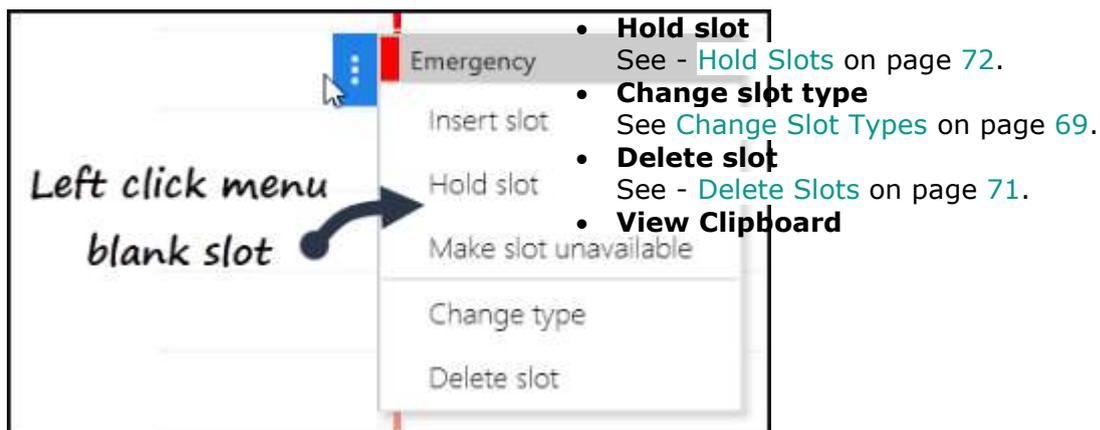
Free Slot - Right Click

The right click option can be used on single or multiple appointment slots, the selected appointments display in a pale blue highlight.
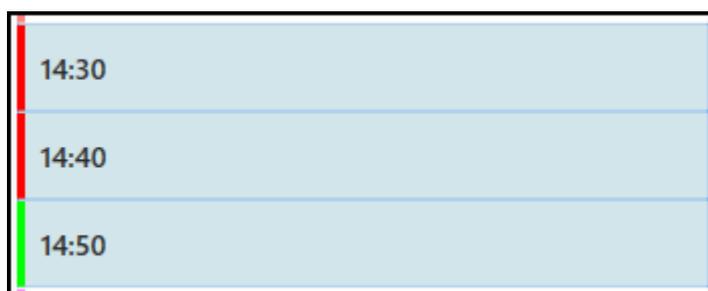
The toolbar activates with the same options as the left click menu, **Insert slot** is only available when a single appointment is selected.

Session Heading

- **Select Free slots**
  Selects all free slots, these can then be deleted / slot type changed.
- **Select booked slots**
  All booked slots are selected and can then be moved/copied/slot type changed.
- **Delete Session**
  Removes the session, and booked appointments move to the clipboard.
  This is not available if any of the appointments have a **Seen** or **In Consultation** status.
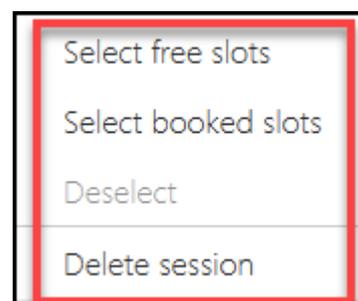
Filters

The filter button is orange when active, hover over to display the filter details.
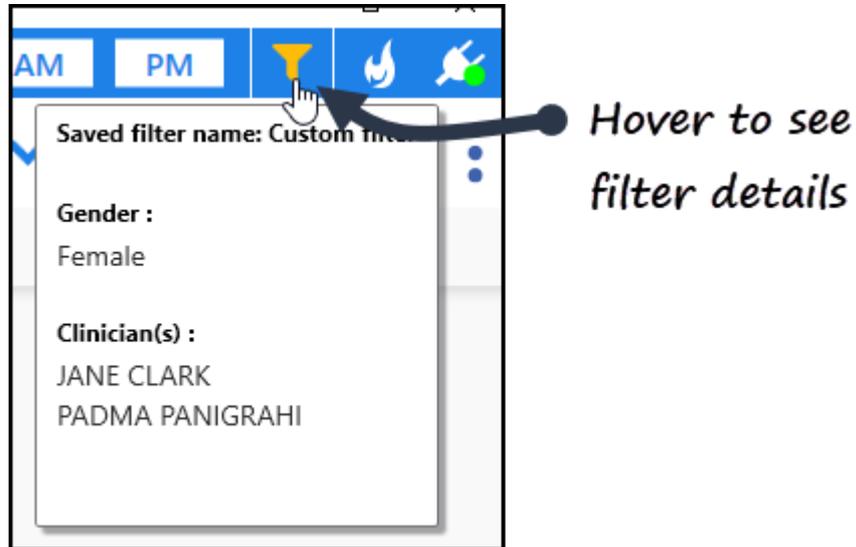
See - Reception View, Book an Appointment on page 50, Apply or Edit Filters on page 80 and Appointment Status - Overview on page 77.

Reception View

The **Reception** view opens on launching the Appointments app.

This view displays the clinician and clinic sessions side by side, to show all appointments at a glance.

Reception View Overview
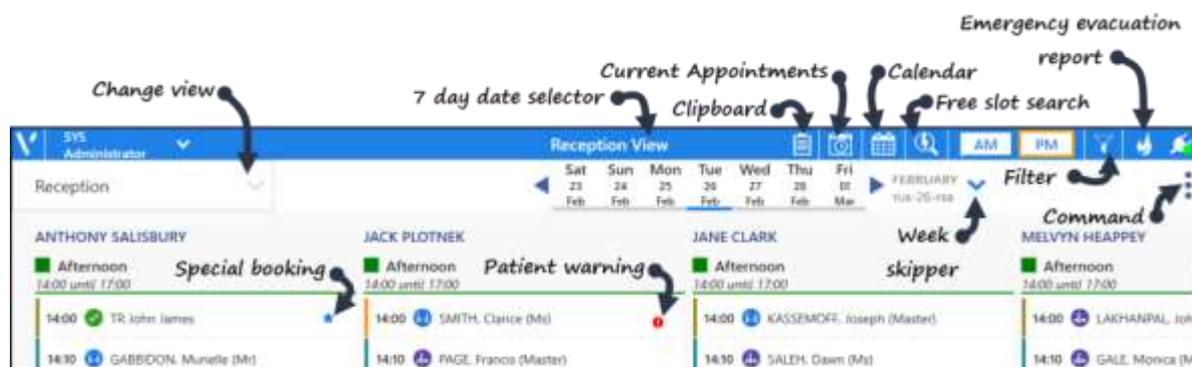
- **AM** or **PM** view
- **Date Selector** - seven days
- **Calendar**
- **Navigation Options** - today, +1 to 6 weeks, previous week
- **Filter**
  See - Apply or Edit Filters on page 80.
- **Free slot search**
  See - Free Slot Search - Overview on page 55.
- **Scroll** down or across to access more appointments
- **Appointment status** - select status to check patient in or increment status
- **Events** - display under the Clinician's name

From the **Reception** view you can also navigate to the other views and access the Clipboard:

- **View Menu** - easily navigate to other views
- **Command Menu** - add sessions, refresh the view, expand/collapse, print options and save order
- **Clipboard** - quickly reschedule Appointments

From the Command menu select **Collapse All** to show all columns on screen. **Expand All** reverts to the default view.

Alternatively, select each column's owner individually to expand/collapse. Appointments can still be booked and updated as usual.
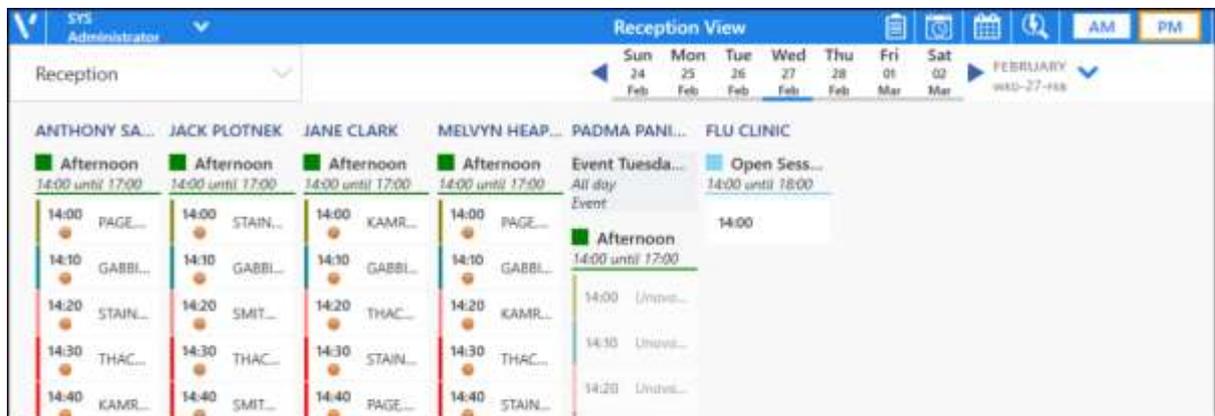
Default filters can also be applied per user to the **Reception** view.

See - Navigating the Reception View on page 44, Preferences Filter on page 9 and Appointment Status - Overview on page 77.

Make a Special Booking

1. From the **Reception** view or **Free slot search**, select a free slot.

    The appointment slot ![lock icon] locks to other users, and the booking form displays.

2. Tick the **Special Booking** box.

3. Enter the patients name into the **Special booking title** box.
4. Optionally, choose **Booking method** from the drop-down list.
5. Record contact details and any notes about the appointment in the comments box.
6. In the booking form you can also:
    *   **Change the appointment duration**
    *   **Change the slot type**
7. Select **Book** to make the appointment.
8. A message displays confirming the booking.

> Appointment for 'John Smith (TR)' booked on 20-Feb-2018 at 14:30 with 'Dr Anthony Salisbury'
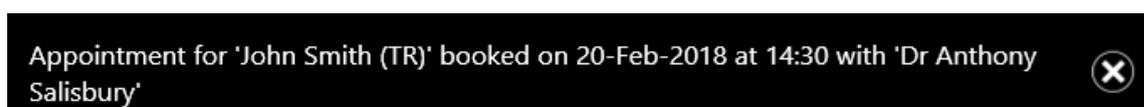
9. In the appointments list a blue star ![blue star icon] displays to the right of the name to indicate this is a special booking.

See - , Reception View and Apply or Edit Filters .

Book an Appointment

1. From the **Reception** view or **Free slot search**, select a free slot.

   The appointment slot ![lock icon] locks for other users, and the booking form displays.

2. Enter the patients Surname and/or Date of Birth into the **Patient name** box .

> **Note** - **Local Practice** next to the appointment, indicates this is at your practice, it is not an indication of branch or main site. Future releases of Appointments will include the ability to a make appointments for patients in a cluster or shared care organisation - subject to the setting up of sharing agreements.

Patient Search Criteria
- Surname
- Surname, Forename
- Surname Date of Birth (full or partial)
- Date of Birth Full
- Surname, forename Date of Birth (full or partial)

The full date of birth can be typed as:

- DDMMYYYY (e.g. 09121980)
- DDMMMYYYY (e.g. 09DEC1980)

The partial date of birth can be entered as:

- YYYY (1980)
- MMYYYY (091980)
- MMMYYYY (DEC1980)

3. Select the **Search** ![search icon] button.

4. Select the patient from the results.

The results detail the patient's registered practice, **Local practice** indicates the patient is on your list.

The next release of Appointments will include the ability to a make appointments for patients in a cluster or shared care organisation - subject to the setting up of sharing agreements.

5. The booking form populates the patient details.
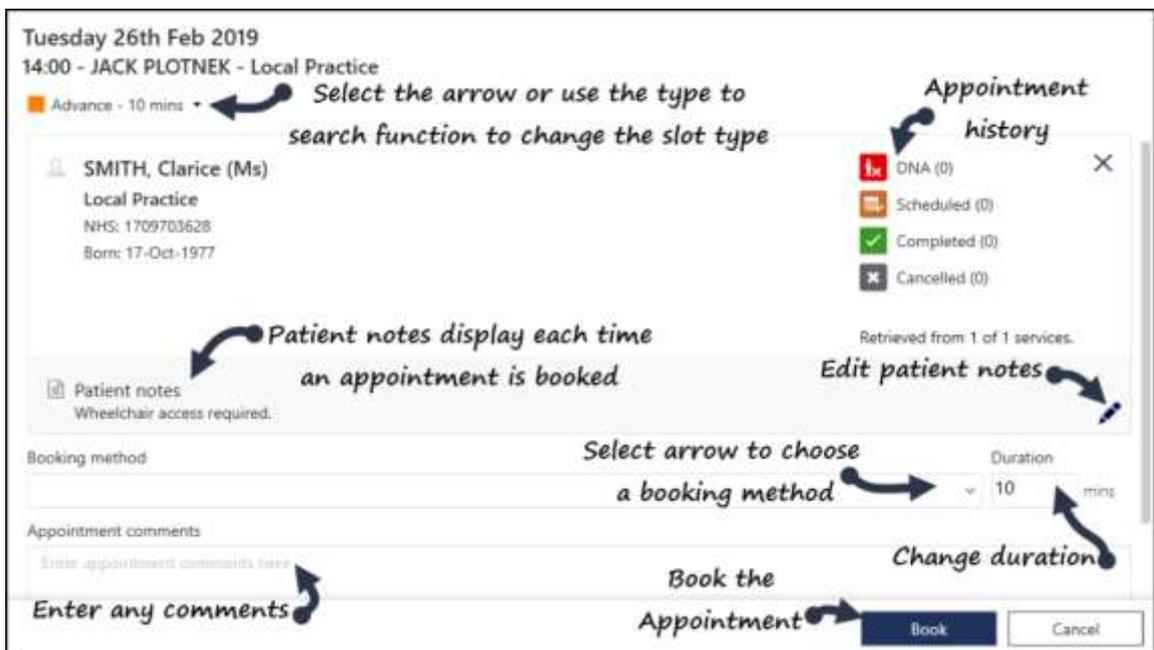
The following options are available:

- Change the appointment duration
- Change the slot type
- Add **Appointment comments**
- View/update the **Patient related notes**. See - Patient View - Patient Notes on page 21.
- View Appointment warnings
- View future and previous appointment status

  Select the buttons for further information

  The time period for the appointment history is set in preferences. See - Preferences - Patient Data on page 13.

6. Select **Book** to make the appointment.
A message displays confirming the booking.

Appointment for 'SMITH, Clarice (Ms)' on Tue 26-Feb-2019 at 14:00 with 'JACK PLOTNEK' at 'Local Practice' has been booked.

See - Free Slot Search - Overview on page 55, Reception View and Apply or Edit Filters on page 80.

Booking Multiple Consecutive Appointments

The **Reception** view supports the booking of multiple consecutive appointments, for example, a patient requires a diabetic review for 30 minutes.

To book multiple appointments:

1. Right click on each of the free slots you want to book.
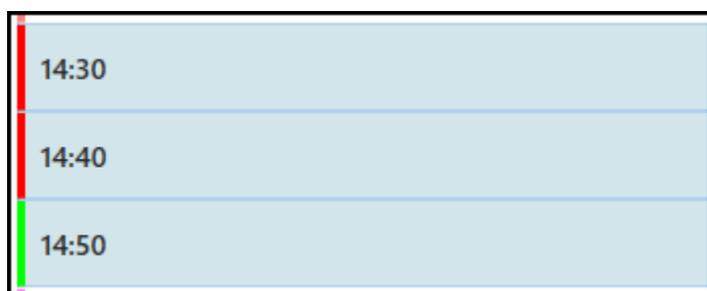
2. The toolbar at the top of the screen activates.

3. Select **Book multiple** from the toolbar.
   The **Booking form** displays.

   > **Note** - The **Book Multiple** button is only activate when you select more than one slot.

4. Enter the patient's Surname and or Date of Birth into the **Patient name** box.
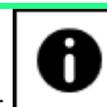
   > **Note** - For a list of specific searching options select on the booking form or see Patient Search Criteria on page 58.
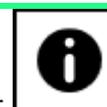
5. Select **Search**.
6. Optionally, check the tick box to include inactive patients in your search, this is a user specific setting that remains until changed.
7. Select the patient from the results.
8. Optionally, update the **Appointment Comments** box.
9. Select **Book** to make the appointment.
   The appointment displays and the overrun slots are removed from view.

Extend Duration

The appointment time can be extended from the booking form, by updating the duration.

1. Select the appointment slot.
2. Choose a patient or record special booking details.
3. Change the duration of the appointment, in the booking form.

4. A prompt displays at the top of the booking form - **The proposed duration for this appointment overlaps with another appointment/slot**.

5. Select **Book** to make the appointment.
    An alert displays **Booking overruns free slots**.
6. Choose either:
    - **Replace Slots** - this removes the overrun slots from the view.
    - **Keep Slots** - leaves the overrun slots in the view, the slots are greyed out to indicate they are not available.
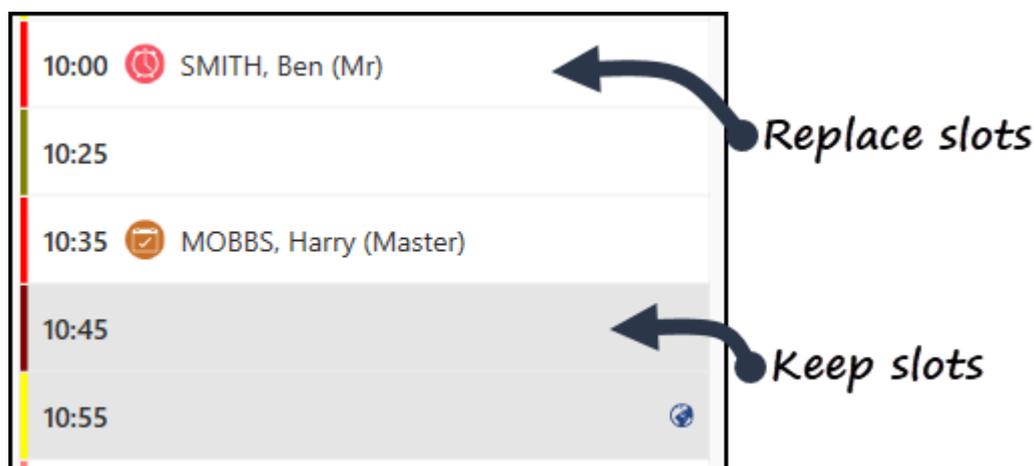
The **Reception**view updates.

See - Book an Appointment on page 50.

Free Slot Search - Overview

The **Reception** view has the **Free Slot Search** option. This is a fast way to book appointments, the view includes a free slot count for today and subsequent days.

The **Free Slot Search** views have the following features:
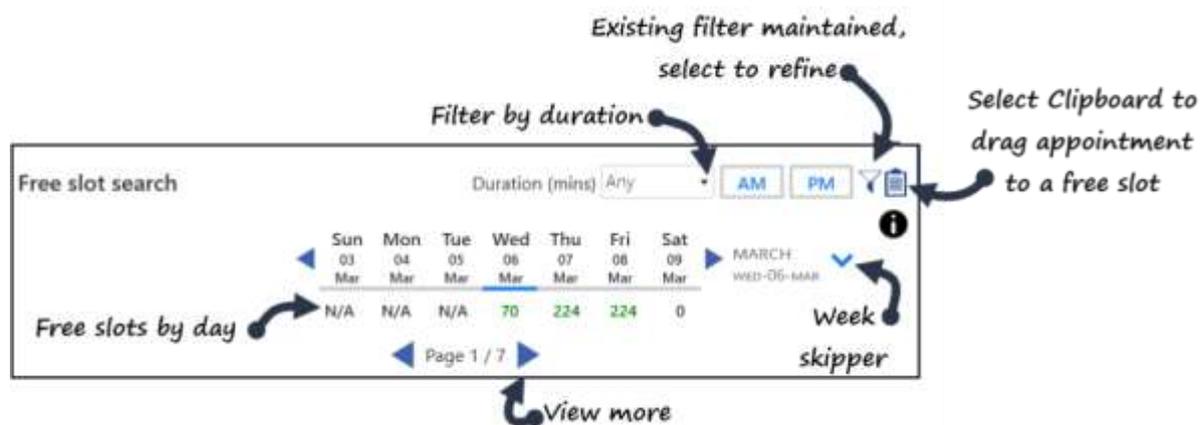
- Search by slot duration
- Filter by AM or PM
- Current filter from the **Reception** view remains active
- Filter can be refined
- Free slot count by day
- Access to clipboard - drag appointment from the clipboard to a free slot
- Information about the current view

View Options

There are 3 display settings, defined in preferences:

Calendar Style

- Shows free slot count by Clinician
- Expand Clinician/Clinic to view free slots

List Style

- Ordered by start time or a range of times across a date
- All free slots available for the selected date - subject to filters
- Hover over colour to see slot type

See - Using Free Slot Search on page 64.

Patient Search Criteria

You can search for a patient using the following options:

- Surname
- Surname, Forename
    - **Note** - There must be a comma between Surname and Forename.
- Surname Date of Birth (full or partial)
- Date of Birth (Full)
- Surname, forename date of birth (full or partial)

The full date of birth can be typed as:

- DDMMYYYY (e.g. 09121980)
- DDMMMYYYY (e.g. 09DEC1980)

The partial date of birth can be typed as:

- YYYY (1980)
- MMYYYY (091980)
- MMMYYYY (DEC1980)

Note - The surname and forename can be full or partial.

This information can be found on any search screen where displays.

Patient Warnings

When a patient has a warning set in **Consultation Manager** a red alert displays, select to view the warning message.

The **Patient warning** alert displays after the patient's name and is visible in the following places:

Reception and
 Current appointment views.

Patient view on the demographic banner:

Appointment Booking Form

If "Show Discreet" is set, a **Show Warning text** box displays - select to view the **Patient Warning**.

Appointment Warnings

When making appointments, you may see the following warnings on the booking form:

Patient already has an appointment on this date

If your patient already has an existing appointment on the same day the message '**Patient already has an appointment on this date**' displays.
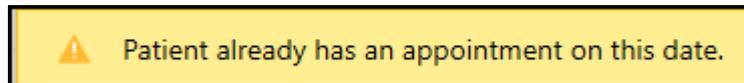
You can either:

- Book the appointment as normal.
- Select the **future appointments** button on the booking form to cancel the other appointment.

This slot conflicts with another appointment / slot

When you book an appointment and change the duration of the slot, the alert '**The proposed duration for this appointment overlaps with another appointment/slot**' displays.
If you want to proceed, book the appointment as normal.
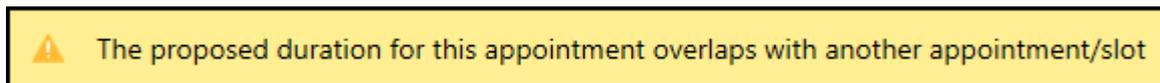
Note - The warnings do not stop you making an appointment.

Ignore Days Prior Restriction

If a slot has a restriction, for example, Book on the Day, you must tick the '**Ignore "Days Prior" restriction (X days)**' to make the appointment.
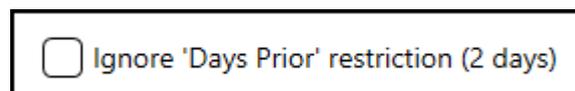
Print an Appointment Label

If your practice has a LabelTrace printer configured as "**Vision_Appointment**", you can print an appointment label from the appointment booking form.

 From the booking form select the **Book & Print** Book + Print button to issue the label.

Note - You can use Dymo printers to print labels in Appointments. This printer needs some configuration, so please contact Helpline for further assistance.

Select a Specific Date

To navigate to a specific date in the **Dashboard** or **Reception** view:

Date Selector

The **Date Selector** at the top of the screen lets you pick a date this week, or navigate forwards/backwards seven days.
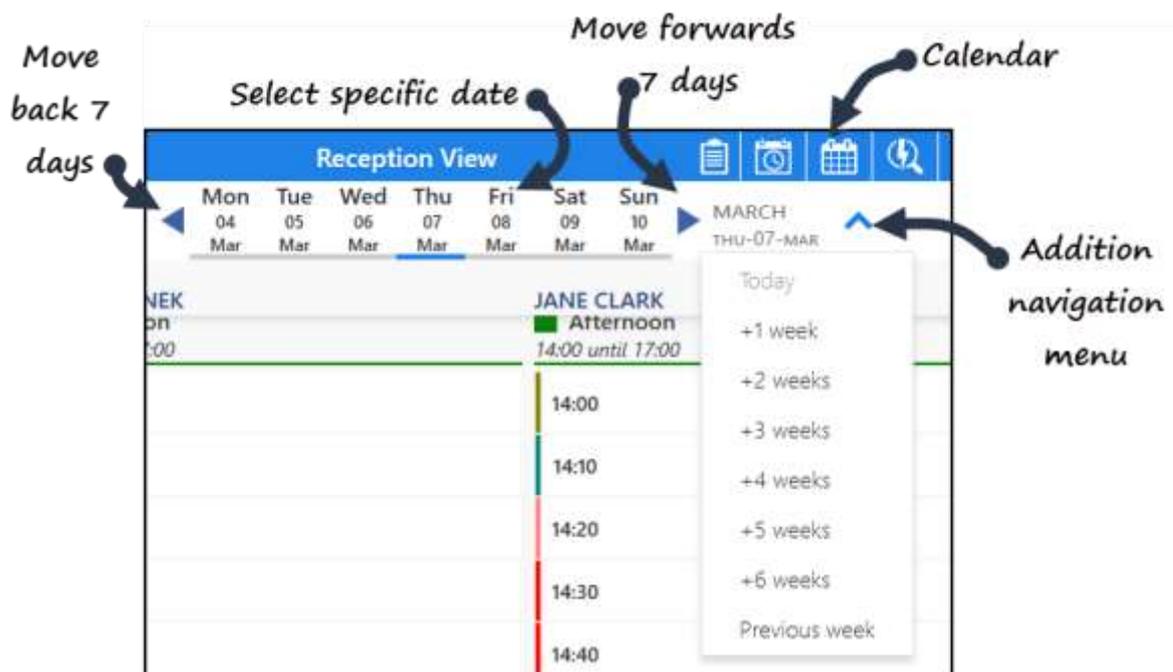
Calendar

Select the **Calendar** button at the top of the screen.
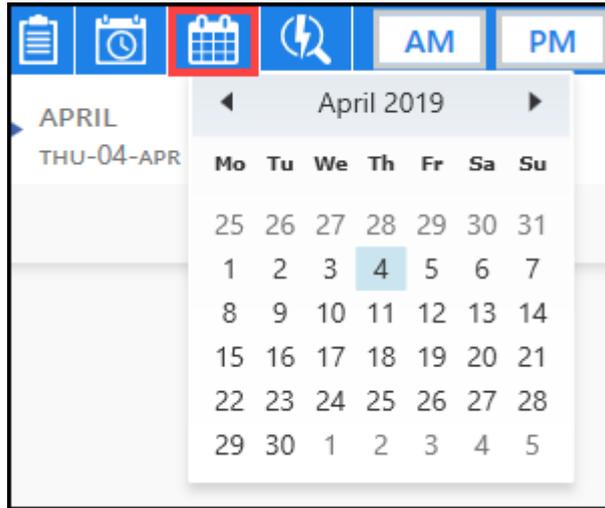
If the date you require is further forward, use the arrows either side of the month to navigate, and select the date.

When you have finished choose **Today** from the **Navigation** menu, to return to today.

Using Free Slot Search

The **Free Slot Search** quickly finds free appointments.

1. Select the **Free slot search** button.
2. The selection of free appointments display, maintaining existing filters.

   Refine the results by:

   - Search by duration
   - Edit or apply filters
     See - Apply or Edit Filters on page 80.
   - AM or PM
   - Week Skipper - move forwards +1+/2/+3/+4/+5+6 weeks or return to today
   - Use the arrows to display additional appointments, or select an alternate date

> **Note** - There are 3 different view options, these are defined in preferences.

3. Select a slot to book an appointment.
   The booking form displays.
4. Enter the patient's details into the **Patient name** box.

Patient Search Criteria

- Surname
- Surname, Forename

> **Note** - You must include a comma between surname and forename.

- Surname Date of Birth (full or partial)
- Date of Birth Full
- Surname, forename Date of Birth (full or partial)

The full date of birth can be typed as:

- DDMMYYYY (e.g. 09121980)
- DDMMMYYYY (e.g. 09DEC1980)

The partial date of birth can be typed as:

- YYYY (1980)
- MMYYYY (091980)
- MMMYYYY (DEC1980)

5. Select the **Search** button
6. Select the patient from the results.
   The booking form populates with the patient's details.
7. Complete the **Booking Form.**

Booking Form Options

- Change the appointment **duration**
- Change the **slot type**
- Add **Appointment comments**
- View / update the **Patient related notes**. See - Patient View - Patient Notes on page 21.
- View Appointment warnings. See - Patient Warnings on page 59.
- View future and previous appointment status

Select the buttons for further information

- DNA's in the last 6 Months
- Scheduled Appointments
- Completed appointments
- Cancelled appointments

The time period for the appointment history is set in preferences. See - Preferences - Patient Data on page 13.

8. Select **Book** to make the appointment.
   A message displays confirming the booking.

See - Free Slot Search - Overview on page 55 and Preferences - Patient Data on page 13.

Cancel an Appointment

To cancel a single or multiple appointment in the **Reception** or **Current appointments** views:

1. Right click on the appointment(s) you want to cancel.
    The selected slot(s) are highlighted, and the toolbar activates at the top of the view.

2. Select **Cancel Appointment** from the toolbar.
3. Choose a **Cancellation reason** from the drop-down list.

4. Select **Yes** to proceed.
    The view refreshes and the appointment slot is available for booking.

See - Move Appointments on page 75.

Change Slot Types

You can change the slot type in the **Reception** and **Current appointments** views for both single and multiple appointments, for example, making more emergency appointments following a Bank Holiday.

1. Right click on each appointment to select.
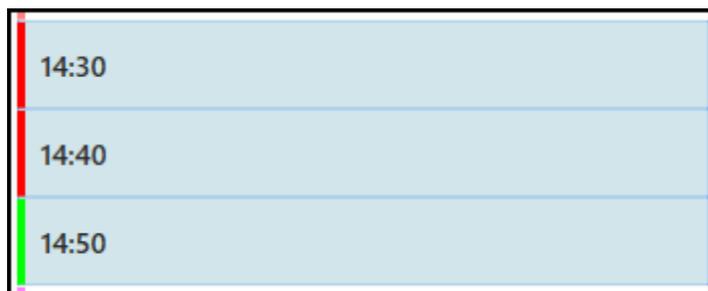
'**XX items selected**' prompt displays at the bottom right of the screen confirming the number of items selected and the toolbar activates at the top of the screen.

2. Select the **Change type** button from the toolbar.
   A list of slot types displays.
3. Choose the slot type, for example, **Emergency** from the list.

The slots automatically update and change to **Emergency**.

Copy Appointments

To make another appointment for a patient, you can copy their existing appointment from the **Reception** or **Current appointments** view.

Note - Copying an appointment copies the patient information only and excludes any appointment comments.

1. Right click on the appointment to select.

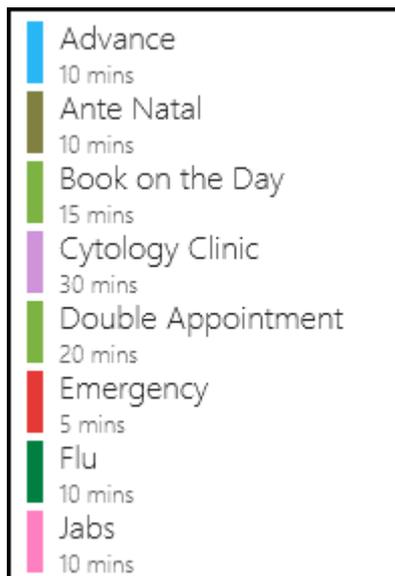   The toolbar displays at the top of the screen.

2. Select the **Copy** button from the tool bar.

   Note - In the **Reception** view - to copy the appointment to a slot on the same day, press CTRL and use drag and drop.

   If you are in the **Current appointments** view open the **Reception** view.

3. Select the **Clipboard** button.
   The clipboard displays **Copied** appointments.
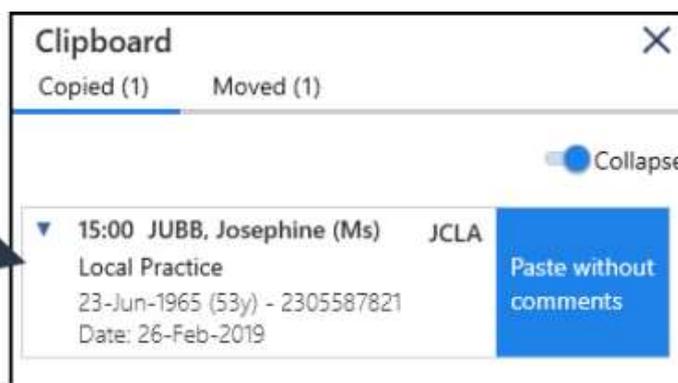
4. Select the copied appointment, drag and drop into a free slot.
   The booking confirmation message displays.

Note - the Appointment remains on the clipboard until you either close the app, or copy another appointment to the clipboard.

See - Move Appointments on page 75 and Cancel an Appointment on page 68.

Delete Slots

Blank slots can be deleted from the **Reception** view.

1. Right click on each slot you want to delete.
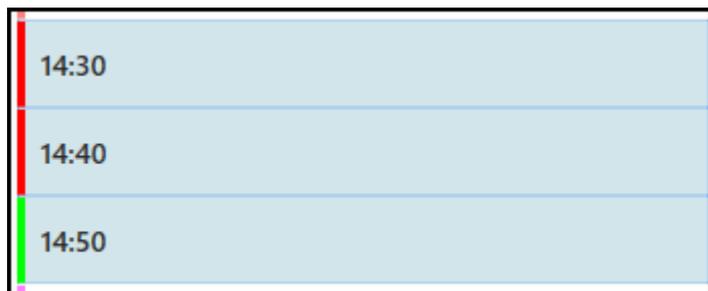
A pop up confirms how many items are selected, and the toolbar at the top of the screen activates.

2. From the toolbar, select the **Delete slot** button.
3. A message displays "**Slots(s) will be permanently deleted**."

4. Select **Delete** to proceed.
    The view refreshes with the slots removed.

See - Change Slot Types on page 69 and Hold Slots on page 72.

Hold Slots

You may need to hold empty appointment slots and this can be done in the **Reception** view.

1. Right click to highlight appointment slot(s).

   '**XX items selected**' prompt displays at the bottom right of the screen to confirm how many items selected, and the toolbar activates at the top of the screen.
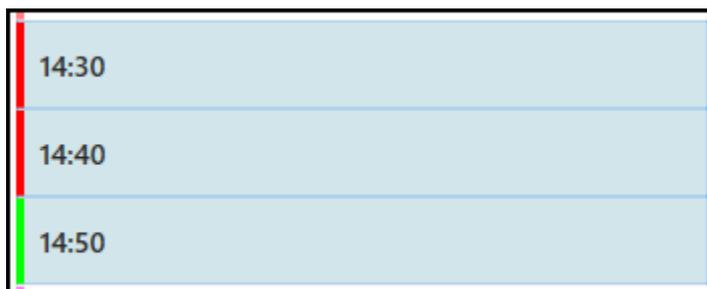

2. Select the **Hold slot** button.

3. The appointment status changes to **Held**.

To release Held Slots:

1. Right click on the **Held** slots.
   "XX items selected" prompt appears at the bottom right of the screen to confirm how many items selected. The toolbar activates at the top of the screen.

2. Select **Release slot** button.
   The view refreshes and the slots are available for booking.

   > **Note** - If the slot is held by you then you can select the appointment and use it as normal without releasing first. Anyone else wanting to use a **Held** appointment must have administration rights to **Release**.

Insert Slots

From the **Reception** view extra slots can be inserted as required.

1. Right click to highlight an appointment slot.

The toolbar activates.

2. Select the **Insert Slot** button.
3. Update the time / duration / slot type / number of slots.

> **Note** - The duration of the inserted slot can be different that the default slot duration.

4. Select **Save** to insert.
   The view refreshes with the additional slots.

See - Hold Slots on page 72.

Make Slots Unavailable

Users with full rights to the Appointments system can mark slots as **Unavailable** and release these.

Any slots marked as **Unavailable** cannot be booked until they are made available again.

1. From the **Reception** view, right click on the slot(s) you want to mark as **Unavailable**.
   The selected slot(s) are highlighted, and the toolbar activates at the top of the view.

2. Select the **Mark slot unavailable** button.
   Alternatively, for a single slot select the **Options** menu and choose **Mark slot unavailable**.
3. The view refreshes and the slot(s) display **Unavailable**.

   14:50   *Unavailable*

   If anyone tries to book the slot, a message displays **'Cannot Navigate to booking because: Slot is unavailable**'.

   Cannot navigate to booking because: Slot is unavailable.
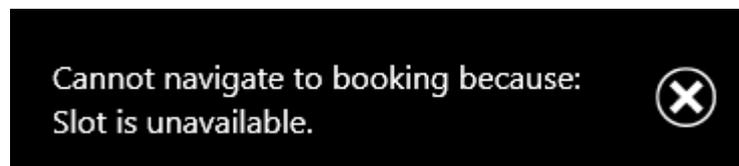
Release Unavailable Slots

Only users with full rights to the Appointments system can release **Unavailable** slots.

1. From the **Reception** view, right click on the **Unavailable** slot(s) you want to make **Available**.
   The selected slot(s) are highlighted, and the toolbar activates at the top of the view.

2. Select the **Make slot available** button.
   Alternatively, for a single slot select the **Options** menu and choose **Mark slot available**.
   The view refreshes and the slot(s) are available for booking.

Move Appointments

To move an appointment in the **Reception** or **Current appointments** view.

1. Right click on the appointment(s) you want to move.

   The toolbar at the top of the screen activates.

2. Select the **Move** button.

    > **Note** - in the **Reception** view, you can move a single appointment to a slot on the same day with drag and drop.

    If you are in the **Current appointments** view, open the **Reception** view.

3. Select the **Clipboard** button.
    The **Moved** section displays moved patients.
4. Find your appointment, then drag and drop the patient to the new slot.
    All the associated comments automatically move to the new date and time.
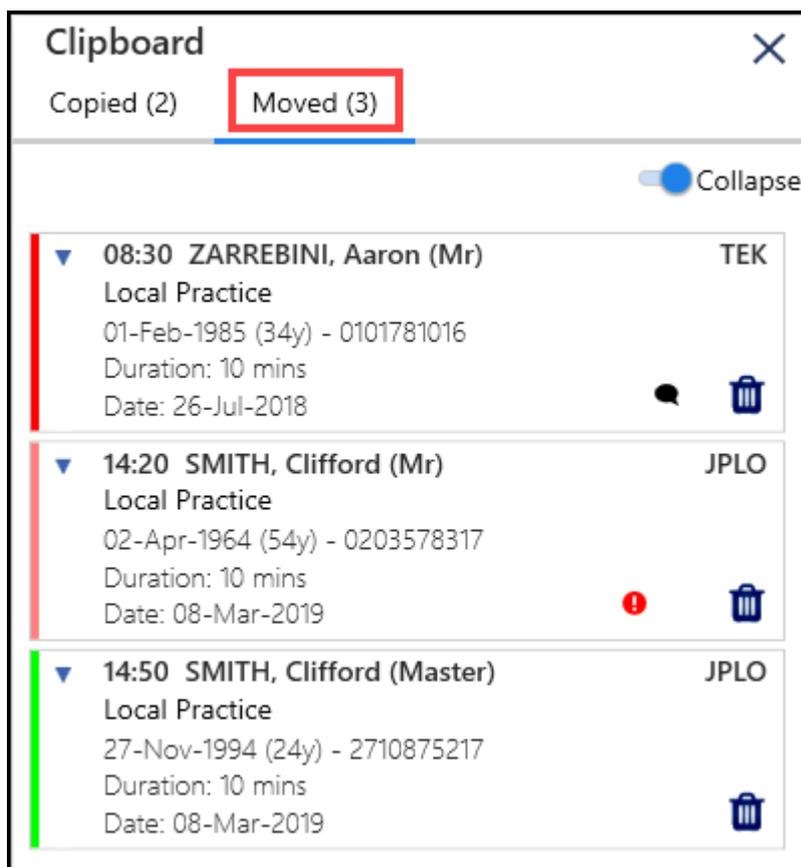
5. A booking confirmation message displays.

Appointment for 'SMITH, Clarice (Ms)' on Tue 26-Feb-2019 at 14:00 with 'JACK PLOTNEK' at 'Local Practice' has been booked.

See - Copy Appointments on page 70.

Appointment Status - Overview

The **Reception**, **Current appointments** and **Patient** views display the status of a patient's appointment using the following icons:

Booked
Once an appointment is confirmed the status defaults to **Booked**.
In the booking form the count underneath denotes how many future appointments the patient has.

Overdue

One minute after the appointment time is due the status changes to **Overdue** for ten minutes, then changes to DNA.

Arrived

When the patient is checked in by reception staff or a self check-in, the status changes to **Arrived.**

In Consultation

When the clinician starts the consultation the status changes to **In Consultation**.

Seen

When the clinician completes the consultation the status changes to **Seen**.
In the booking form, the count indicates the number of completed appointments.

DNA

Ten minutes after the appointment time has elapsed, the status changes to **DNA**.
In the booking form, the count indicates the number of DNA's in the last 6 months. The count can be set to pulse as an alert.

See - Preferences - Patient Data on page 13.

Web Appointment
Slot bookable by your patients online, or against a booked appointment indicates that this was booked online.

Available for Web Slots

Appointments available for patients to book online are identified in **Reception** view by a

Globe symbol.

- The available for web slots can be booked as normal by reception staff.
- Any slot booked online by a patient displays the **Globe** icon next to the status.

The configuration and distribution of **Reserved for Web** slots can be managed with either Appointments Setup or within Vision 3 Appointments.

Check a Patient in on Arrival

A patient can be booked in from the **Reception** or **Current appointments** view. When a clinician starts and ends a consultation the status updates automatically.

- To mark a patient as arrived press the **Booked** appointment status.

  The status updates to **Arrived**.
- You can also right click on the appointment, select **Change Status** from the menu, and choose a status from the drop down list:
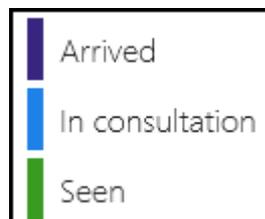
View Status Times

In the **Reception** select the patient's name to access the booking form.

In the **Current appointments** view the waiting time displays next to the status.

Note - Practices that have Self Check-in screens for their patients will see the appointment status update automatically as the patient checks in.

See - Appointment Status - Overview on page 77.

Apply or Edit Filters

The **Filter** at the top right of the screen enables you to refine the **Reception**, **Current appointments** and **Free slot search** views.
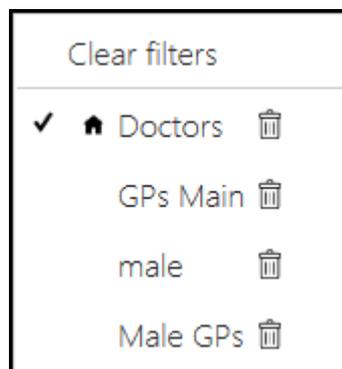
You can save your own filters, and create practice wide filters.

A default filter can also be set per user - see .

Access the Filters

1. Select the **Filter** button.

   If the **Filter** is orange an existing filter is active, hover over the filter to see the details or right click and choose **Clear filter**.


   Note - A tick displays next to the active filter name.

2. Filters can be applied to the following categories:
   - **Gender**
   - **Spoken Language**
   - **Clinician**
   - **Clinic**
   - **Slot Types**
   - **Sessions**

   Note - Any clinics or clinicians that are marked as inactive book owners, and have appointments, are indicated by a "strike through". Any inactive book owners without appointments are not displayed.

3. Select a category heading to expand, for example, languages.
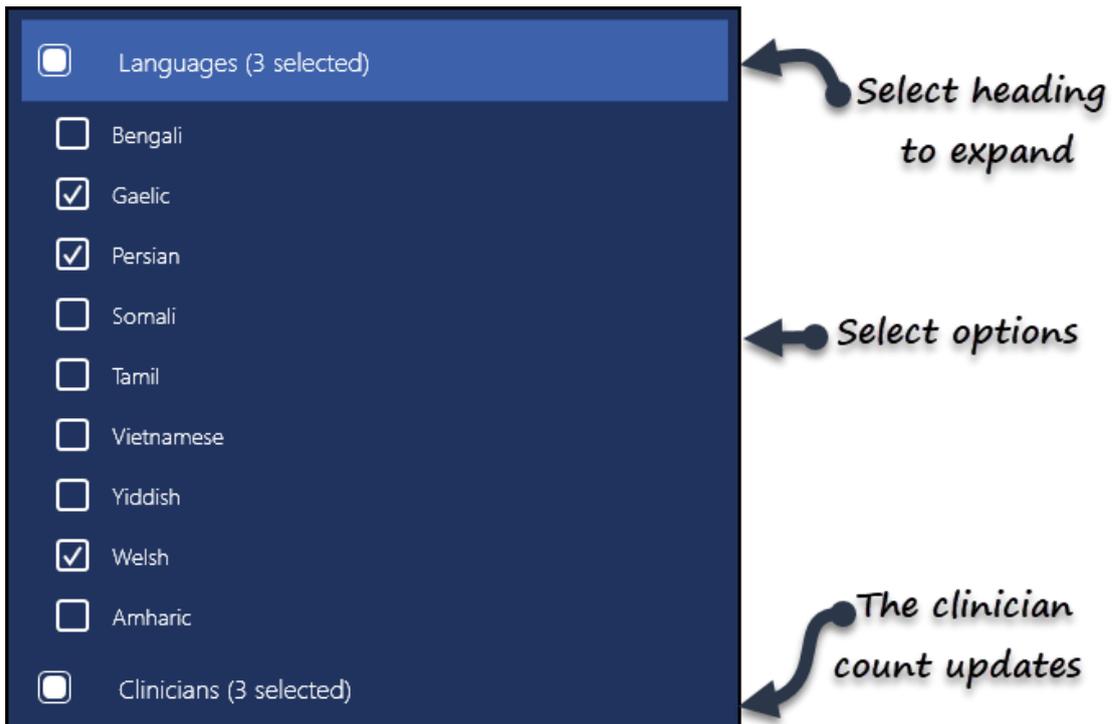
4. Select from the available options.
As the languages for example, are chosen, the count of clinicians updates automatically.
5. Select additional categories as required.
6. Select Run **Run** to apply the filter.

Save the Filter

The filter can be saved for future use.

1. Follow steps 1-5 above.

2. Select the **Save** button.
3. Enter the **Filter Name** in the box.

4. To make the filter practice wide, tick the box.
5. Select **Save and apply** to use the filter immediately.

Note - You can set a filter as a default in preferences.

Reorder the Columns in the Reception View

If required you can reorder the columns in the **Reception** view, by dragging the columns.

1. To save the new column order, you must save the filter - see Save the Filter on page 81.
2. Select the columns and drag into the preferred order.
3. Select the **Command Menu** in the top right corner.
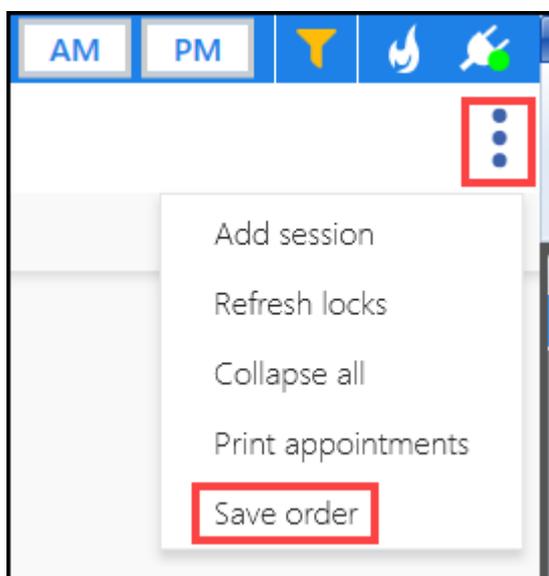
4. Choose **Save Order**.
   The order applies to the filter.

Note - Saved Filters are accessed by right clicking the filter icon.

See - Saved Filters on page 87, Preferences Filter on page 9 and Clear Filters on page 83.

Clear Filters

If the filter is orange [icon] it indicates a filter is already active.

1. Select the **Filter** [icon] button.
2. Choose the **Clear** [Clear] button at the top of the screen. The filter is removed and the view refreshes.

Right Click Filter Options
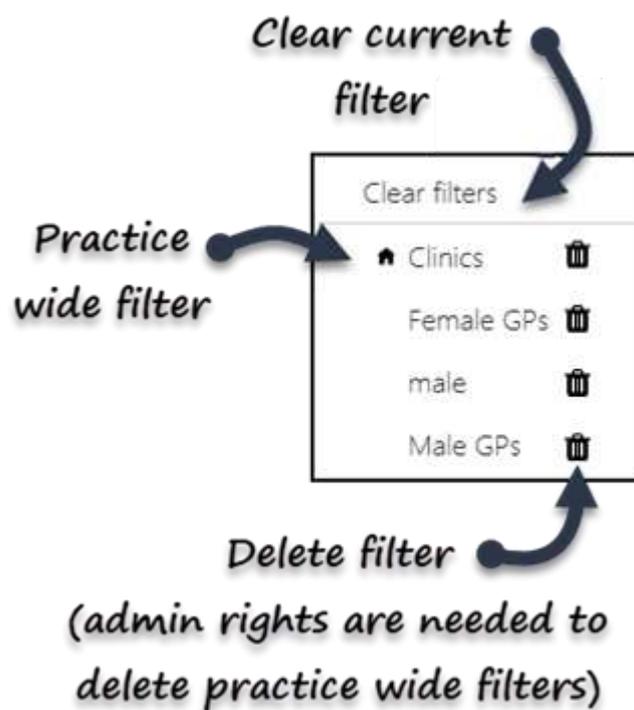
- **Clear** filter
- **Delete** personal and practice wide filters

Note - Practice wide filters are indicated by a **House** [icon] symbol

See -

Delete Filters

If a filter is no longer required it can be deleted.

1. Right click on the **Filter** button.

2. Select **Delete** next to the filter you wish to remove
   The filter is removed.
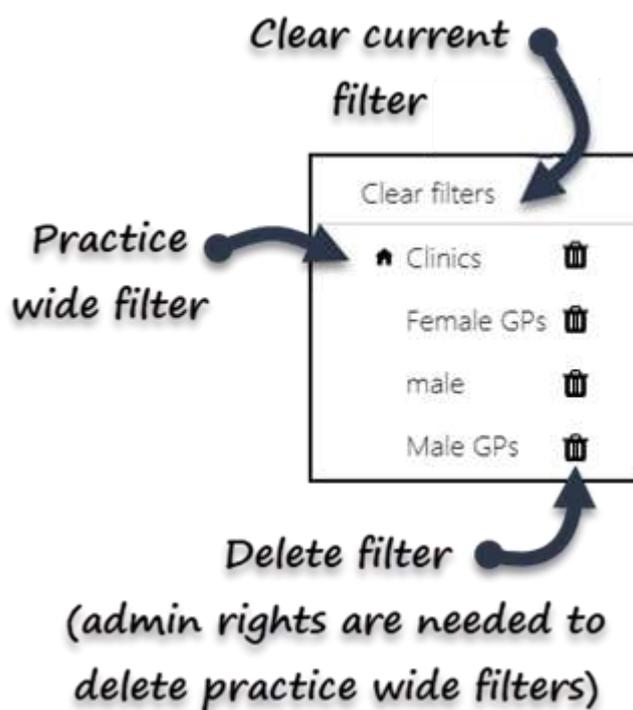
Note - Practice Wide Filters can only be deleted if you have admin rights.

See -

Practice Wide Filters

Your practice can have shared filters.

Only members of staff with admin rights can create practice wide filters.

To set a Practice Wide Filter:

1. Select the **Filter** button.

   If the Filter is orange it means an existing filter is active. See - Clear Filters on page .

2. Filters can be applied to the following categories:
   - **Gender**
   - **Spoken Language**
   - **Clinician**
   - **Clinic**
   - **Slot Types**
   - **Sessions**

   Note - Any clinics or clinicians that are marked as inactive book owners, and have appointments, are indicated by a "strike through". Any inactive book owners without appointments are not displayed.

3. Select a category heading to expand, for example, languages.

Select heading to expand

Select options

The clinician count updates

4. Choose from the available options.
   As the options are chosen, the number of clinicians updates automatically.
5. Select additional categories as required.

6. Select **Save** .
7. Enter the **Filter Name** in the box.

8. Tick the **Practice Wide** filter option.
9. Select **Save and apply** to use the new filter immediately or **Save**.

   When you right click on **Filter** you can see any practice wide filters that have been

   set. These are identified with a **House** symbol.

10. Optionally, you can reorder the columns in the **Reception** view, then from the
    Command menu, select **Save Order**.
    This saves the order of columns to the filter settings.

Note - You can only delete a practice wide filter if you have sufficient admin rights.

See - Saved Filters on page 87, Preferences Filter on page 9 and Clear
Filters on page 83.

Saved Filters

Saved filters are stored and accessed by right clicking the **Filter** button.

A list displays showing your individual filters and any practice filters.

- To run a saved filter, simply select it from the drop down list.
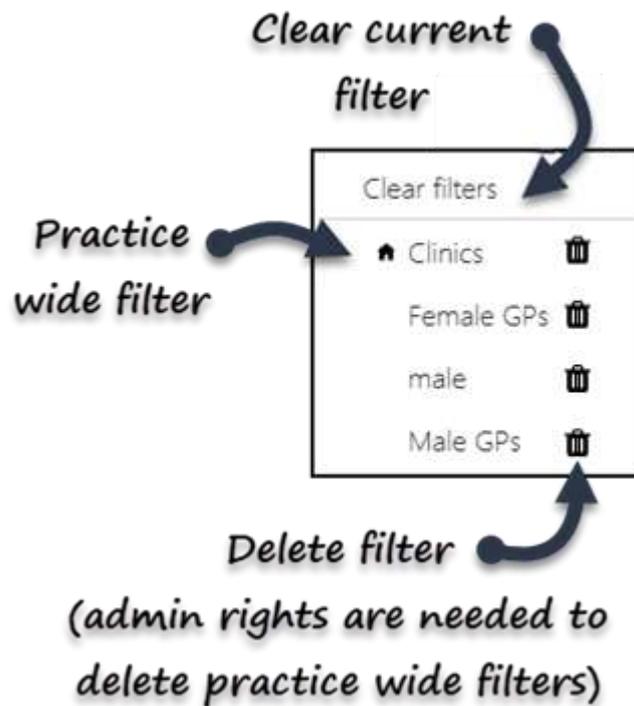
- Select the **Bin** to delete a saved filter.

Note - Practice wide filters can only be deleted by users with admin rights.

See -

Search for Special Bookings

You can search for **Special Bookings**:

1. From anywhere on the **Reception** views, press F3 or start typing the patients name or booking, and the search box displays.
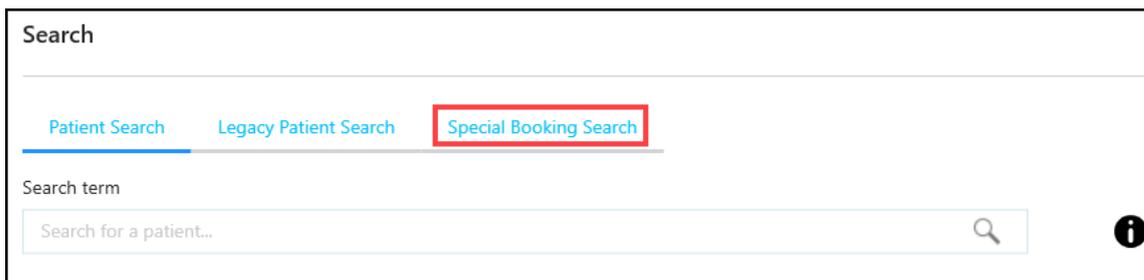
2. The search defaults to the last used search.
   Select the **Special Bookings Search** tab.
3. Enter the details, for example, HGV.
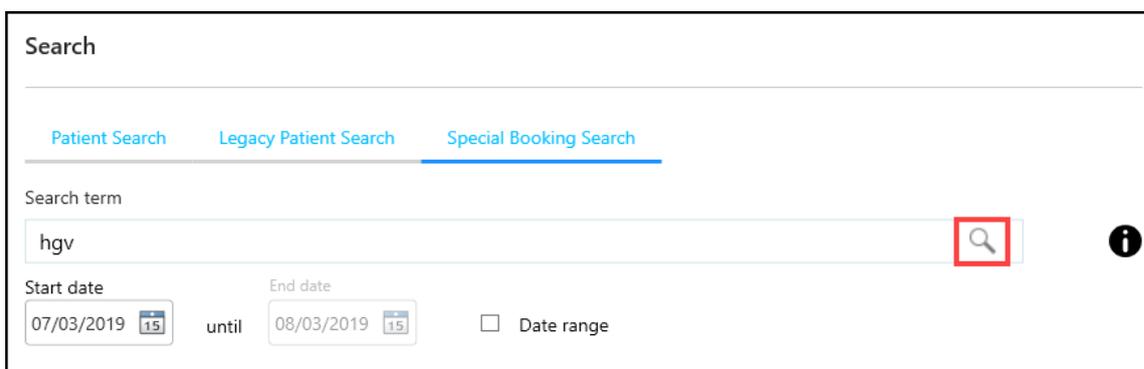
4. Update the dates as required.

5. Select **Search** [magnifying glass icon].
   The results display.
6. Optionally, enter additional information to refine the results further.
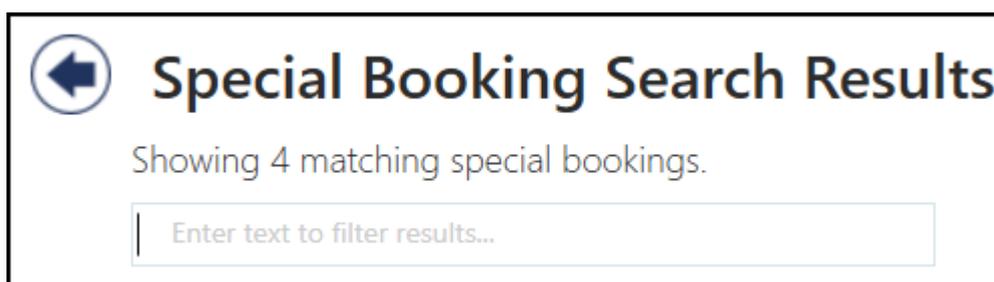
7. Choose the patient or booking from the list.
   The booking form opens.
8. Select **Save** or **Cancel** to close.

Results - Display and Filter Options

The search results screen has two display options:
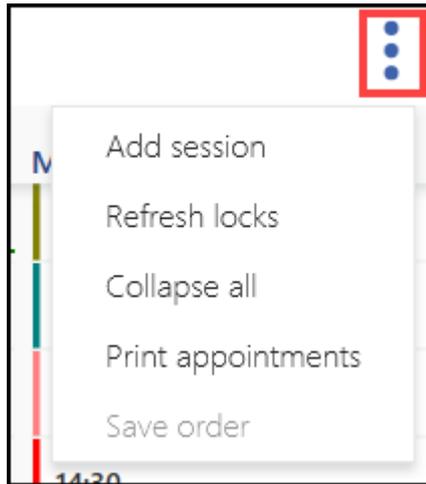
- ⬛ - **Tile view**:
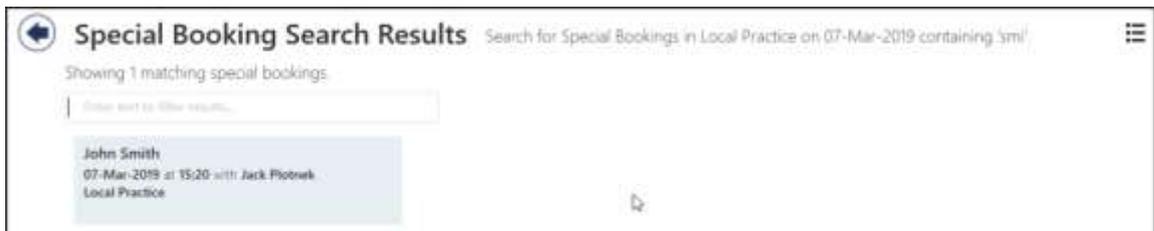
- ⬛ - **List view**:

See - Make a Special Booking on page 49.

Add Sessions

Sessions can be added and deleted as required in the **Reception** view.

1. Navigate to the date you wish to add a session.
2. Select the **Command menu** from the top right of the **Reception** view.

3. Select **Add Session**.
    The **Add Single Session** window displays.
4. Select the book **Owner** from the drop down list.

5. Select the **Session** from the drop down list.
6. Enter the start time of the session.

    Note - This must be after the current time, if the session is for today.

7. Select **Save**.
    The view updates with the new session.

    Note - If the new session clashes with an existing session, an error displays "**Unable to Add Session**". Select **OK** to return to the **Add Single Session** pop up to select a new time.
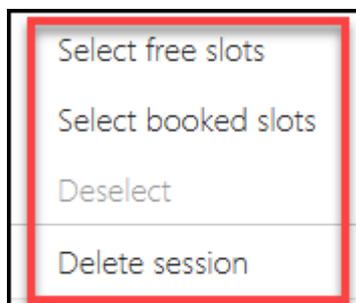
Delete Session

Sessions can be added and removed on an ad hoc basis within the **Reception** view.

1. Navigate to the session you want to remove.
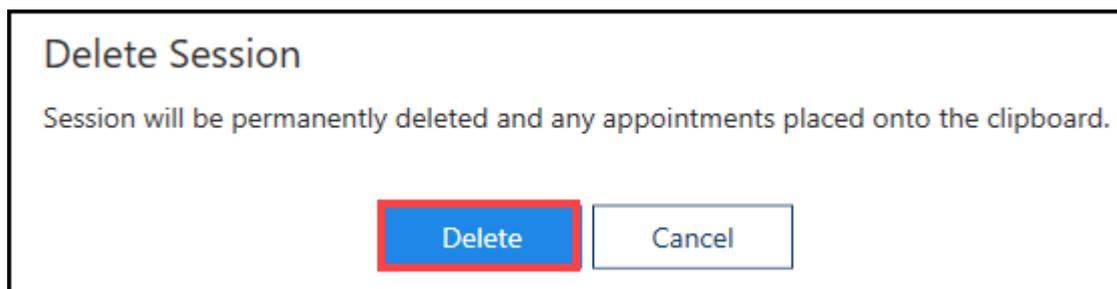2. Hover the mouse over the session heading to activate the **Options** menu.

3. Select the **Options** button.
   The menu displays.
4. Choose **Delete Session**.

A pop up warning displays **"Session will be permanently deleted and any appointments placed on the clipboard"**.

5. Select **Delete** to proceed.

6. The view refreshes, with the session removed.

All the booked appointments move to the **Clipboard** .

See - Add Sessions on page 90 and Move Appointments on page 75.

Emergency Evacuation Report

The Emergency Evacuation Report details by clinician, the patients in consultation, and those the waiting room.

1. From the Reception view select the **Emergency Evacuation** button.
2. The report generates to your default printer, and includes the time of generation.

```
                        NHS Confidential

Emergency Evacuation Report - 14-Mar-2019 at 15:53

Local Practice

        JANE CLARK

                Patients in waiting room

                        KAMRAN, Joseph (Mr) - 09-Dec-1944 (74y)

                Patients in consultation

                        KANE, Joseph (Mr) - 02-Oct-1965 (53y) in consultation since
15:29
```

Print Appointments Lists

You can print a report which details all the appointments booked for the day you are viewing.

1. From the Reception view, select the **Command** menu.
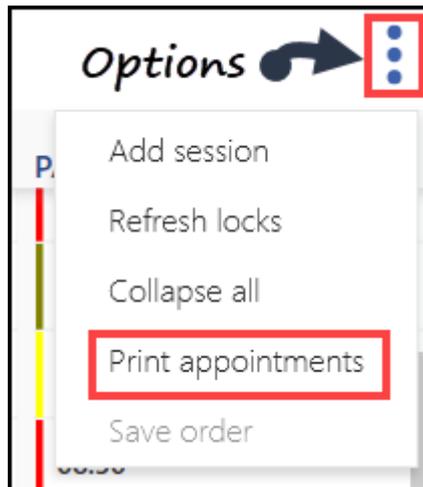
2. Choose **Print Appointments**.
    The printer dialogue displays.
3. Choose your printer.
4. Select **Print**.
5. The list includes Patient/Special Booking Name with date of birth and NHS Number, Slot Type, Contact Details and Comments.

JANE CLARK on 14-Mar-2019 ← *Clinician and session details*

Morning - 08:00 until 11:55

Time	Patient/Special Booking Name	Slot Type	Contact Details	Comment:
08:50	Free	Emergency		
09:00	KAMRAN JOSEPH 09/12/1944 0911377212	ANT		
09:10	HACKETT MARY 29/07/1954 2906476323	Emergency	M: 07974941111	
09:20	Free	BOD		
09:30	LAKHANPAL JOHN 18/01/1948 1812403119	Far		
09:40	Free	Emergency		
09:50	KANE JOSEPH 02/10/1965 0209586613	Reserved for Web		
10:00	Free	Emergency		

See - Emergency Evacuation Report on page 92.

Help topics

Welcome to the Appointments Help Centre

1 - Getting Started

2 - Navigating the Views

3 - Making Appointments

4 - Edit Appointments

5 - Appointment Status

6 - Filtering Views

7 - Special Bookings

8 - Sessions

9 - Reports

Index