

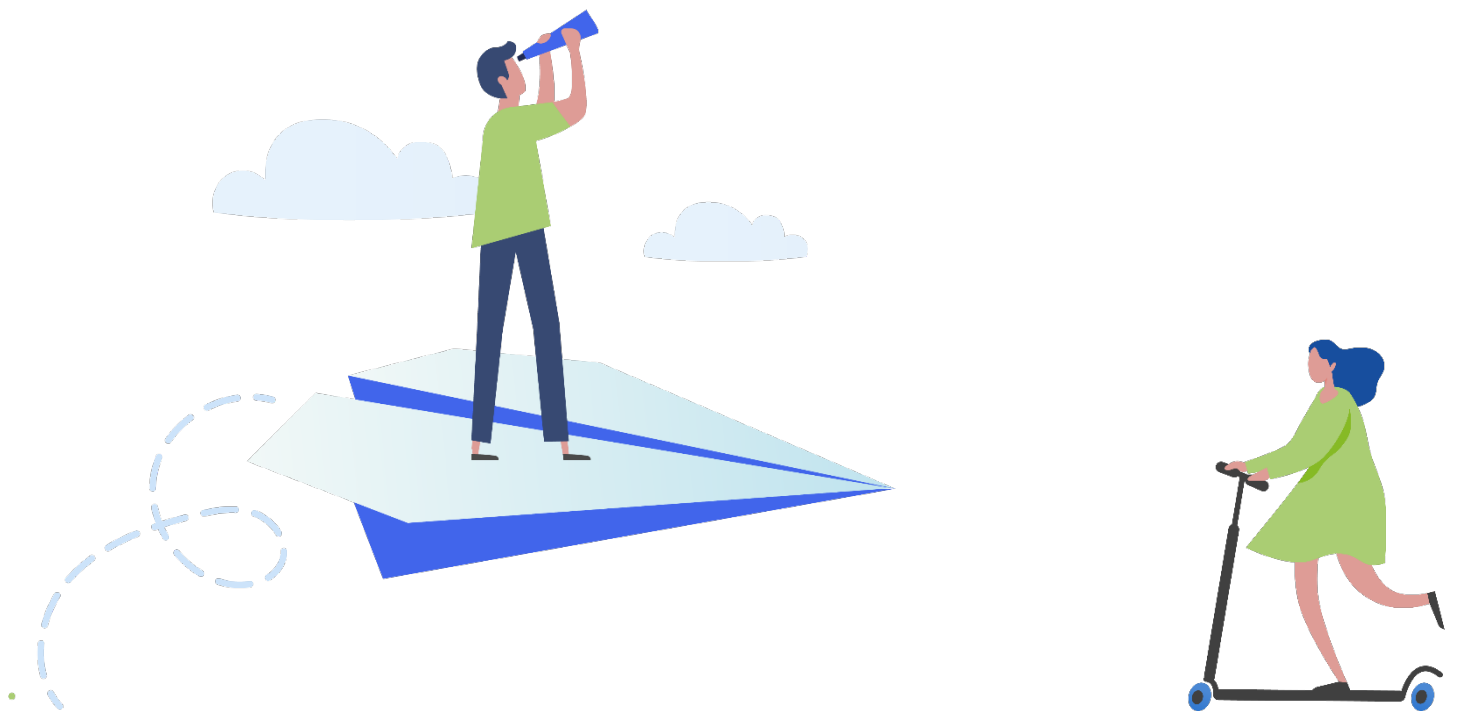


Appointments

Appointments Release Guide 3.0

Version 2

30 March 2021





Copyright © 2021 Cegedim Healthcare Solutions

All Rights Reserved

Cegedim Healthcare Solutions is the trading name of Cegedim Rx Ltd and In Practice Systems Limited.

No part of this document may be photocopied, reproduced, stored in a retrieval system or transmitted in any form or by any means, whether electronic, mechanical, or otherwise, without the prior written permission of Cegedim Healthcare Solutions.

No warranty of accuracy is given concerning the contents of the information contained in this publication. To the extent permitted by law, no liability (including liability to any person by reason of negligence) will be accepted by Cegedim Healthcare Solutions, its subsidiaries or employees for any direct or indirect loss or damage caused by omissions from or inaccuracies in this document.

Cegedim Healthcare Solutions reserves the right to change without notice the contents of this publication and the software to which it relates.

Product and company names herein may be the trademarks of their respective owners.

Registered name: Cegedim Rx Ltd. Registered number: 02855109

Registered name: In Practice Systems Limited. Registered number: 01788577

Registered address: The Bread Factory, 1a Broughton Street, London, SW8 3QJ

Website: <https://www.cegedimrx.co.uk>



Contents

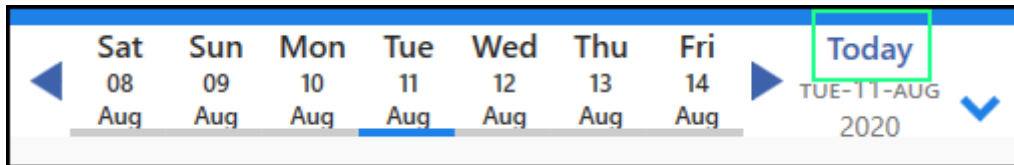
Vision Appointments Release 3.0	4
Preparing for Desktop Vision Appointments for Vision Practices	6
Why does this need to be done?	6
Who needs to do this?	6
Do users need to use an NHS email address?	6
Can users share email addresses?	6
What happens next?	6
How do I add/maintain email addresses?	7
Logging onto Appointments from your Desktop	9
Installing a Appointments Update	11
Using Appointments in a Shared Care Setting	12
Organisational Services	15
Adding a Shared Care User	16
Resetting a Password for a Shared Care User	20
Unlocking a Shared Care User's Account	22
Searching for a Patient	24
Sorting Patient Search Results	26



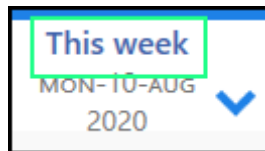
Vision Appointments Release 3.0

Vision Appointments release 3.0 contains the following updates:

- **Reception View** - There is now a **Today** option available from the **Reception** screen when you navigate away from today's appointment book, simply select **Today** to return:



- **Weekly View** - There is now a **This Week** option from the **Weekly** screen when you navigate away from the current week, simply select **This Week** to return:



- **Vision Appointments from your Desktop** - Where appropriate, for example in a shared care setting, you can now log into **Appointments** directly from your desktop.



See [Logging onto Appointments from your Desktop](#) on page 9 for details.

- **Vision Appointments in a Shared Care Setting - Appointments** can now be used in a shared care setting where sharing agreements are set up.



See [Using Appointments in a Shared Care Setting](#) on page 12 for details.

- **Click Once Installation Package** - This process simplifies the installation and update process for **Appointments**. When a new version becomes available, Vision informs you of this and releases the upgrade from our central servers. The next time each user logs into **Appointments**, they are asked if they want to run the update and then they simply follow the installation wizard. This does not require administrator access to the workstation.



Note - This is not compatible with the Chrome browser.



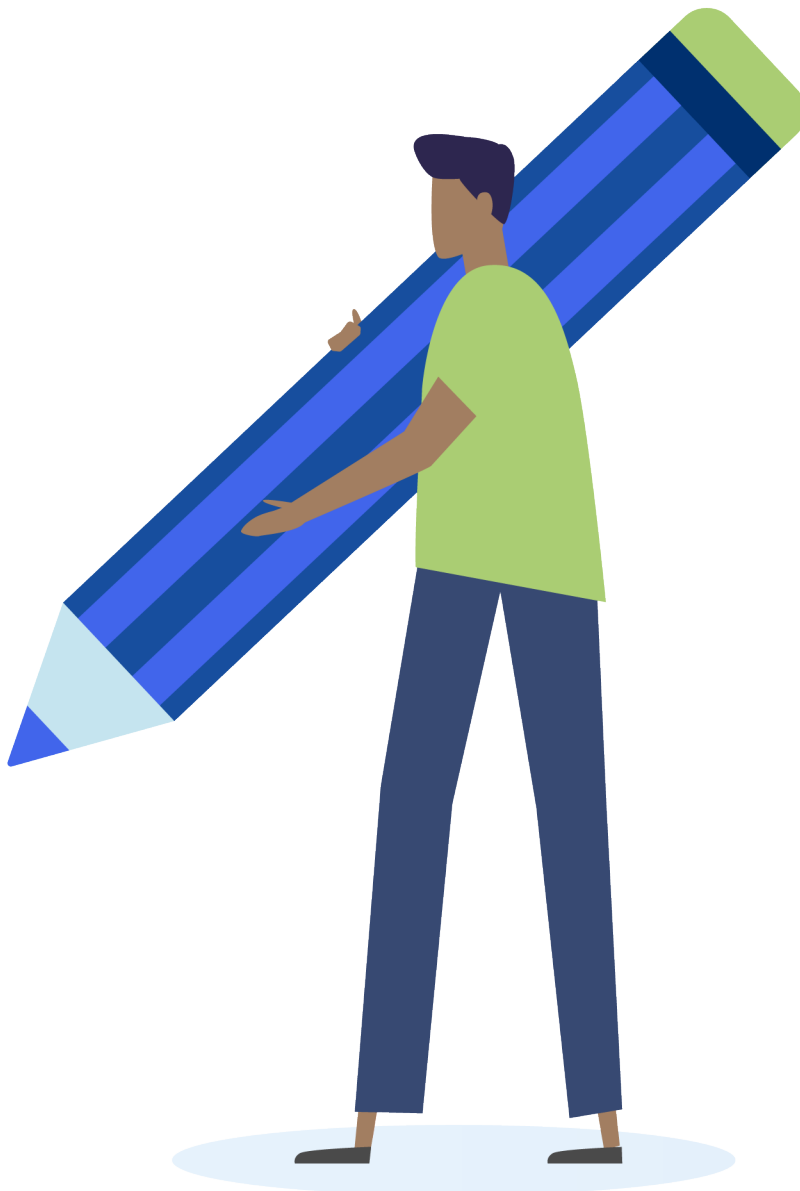
See [Installing an Appointments Update](#) on page 11 for details.



- **Searching for a patient** - The way you search for a patient has been updated. This varies depending on how you access **Appointments**.



See [Searching for a Patient](#) on page 24 for more details.





Preparing for Desktop Vision Appointments for Vision Practices

- Before anyone can login to **Appointments** from their desktop, they need to have an email address set up in **Vision 3**.

Why does this need to be done?

- All Vision apps use a staff member's registered email address as their unique user name.

The email addresses together with Vision passwords and linked staff details are transferred into **Vision 360** ready to be used when any app is enabled.

Who needs to do this?

- Email addresses in **Vision 3** are set up and maintained by System Administrators at each practice.

Do users need to use an NHS email address?

- Yes, an NHS email address is required.

Can users share email addresses?

- No, every **Appointments** user must have their own email address.

What happens next?

- Once all user details have been transferred into Vision 360, your practice can be configured to use **Appointments** from the desktop. Depending on whether your patient's clinical data is already being streamed into the Vision 360, there may be a short delay before **Appointments** is ready to use from the desktop.

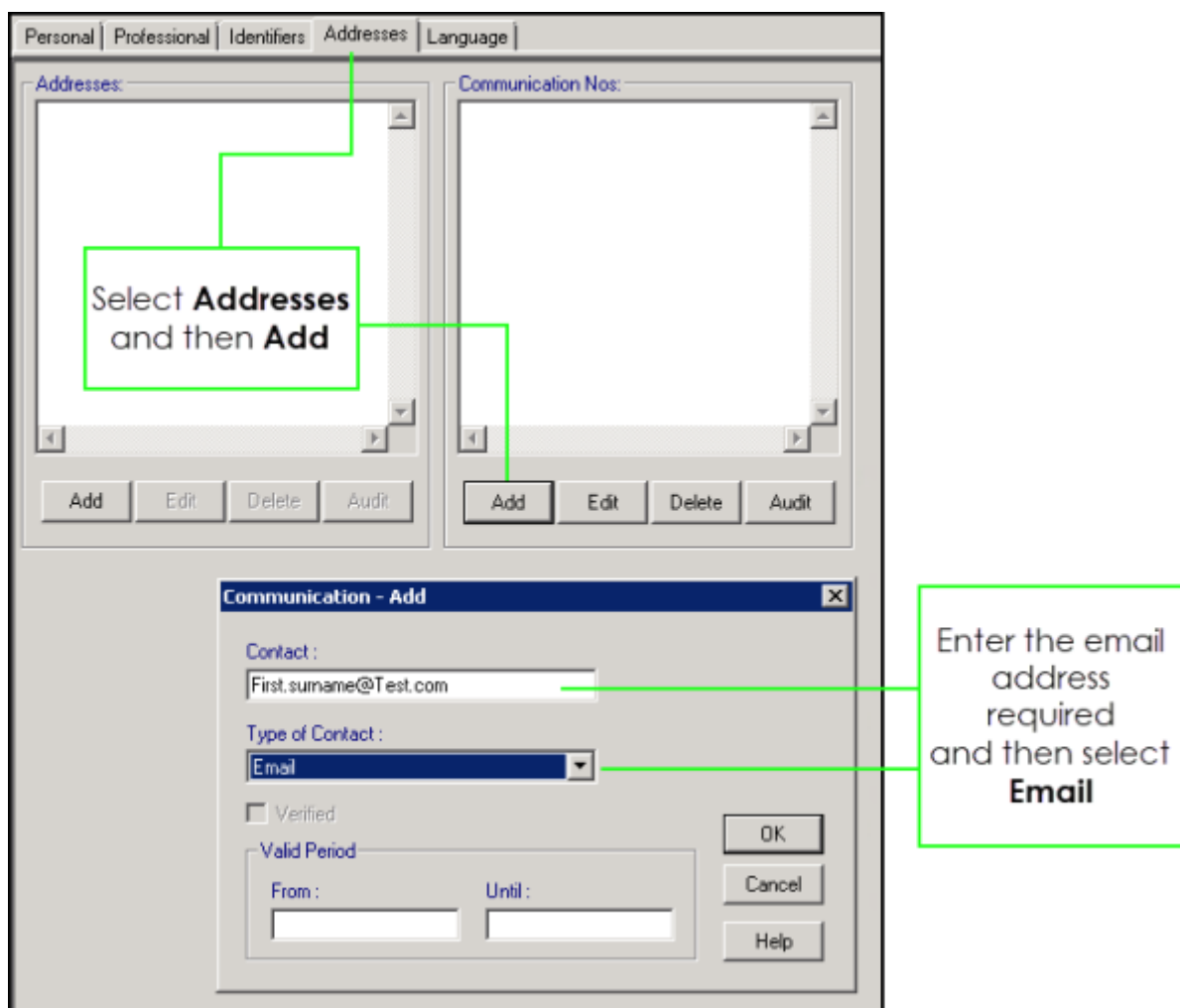


How do I add/maintain email addresses?

Each user who needs to use Appointments must have their email address set up in **Control Panel - File Maintenance - Staff - Communications Numbers**.

To add an email address:

1. From **Vision 3**, select **Management Tools - Control Panel - File Maintenance - Staff**.
2. Right-click on the staff member required and select **Edit Staff**.
3. Their **Personal** tab displays, select the **Addresses** tab.
4. Under **Communication Nos**, select **Add** and the **Communication - Add** screen displays:



5. Complete as required:
 - **Contact** - Enter the staff member's email address
 - **Type of Contact** - Select **Email**
6. Select OK and then OK again, in the main staff window, to save your changes.

Repeat this process for every member of staff who needs access to **Appointments**.



User details transfer to Vision 360 approximately every twenty minutes. After this short delay your staff members can log into **Appointments**, from the desktop, using their email address as their username and their usual Vision 3 password.



Note - If any staff member has more than one Vision 3 user account, only the preferred user should be updated with the email address, and the password for this user should be used for accessing **Appointments**. We strongly recommend you inactivate any unused staff accounts.



Important - If a staff member is set up in more than one practice with the same email address, their credentials, for example, prescriber code must be set up in each Vision system otherwise it can cause issues.





Logging onto Appointments from your Desktop

To access **Appointments** from your desktop:



1. From your desktop, double click on **Vision Appointments**.
2. The **Log in** screen displays:

The screenshot shows the Vision login interface. At the top left is the Vision logo, consisting of two stylized 'V' shapes (one blue, one green) and the text 'vision A Cegecim Brand'. Below the logo is the text 'Signing into England - Change'. There are two input fields: 'Username' and 'Password'. The 'Username' field has a callout box pointing to it with the text: 'Enter either: your email address recorded in Vision 3, if you are a Vision 3 user, or the email address recorded in V360 Clinical Portal'. The 'Password' field has a callout box pointing to it with the text: 'Enter either: your Vision 3 password or the password set up in V360 Clinical Portal'. Below the input fields is a blue 'Sign in' button.

3. Enter your email address:
 - **Vision 3 user** - If you use Vision 3, this is the email address set up within **Vision 3 - Control Panel - File Maintenance - Staff**, see [Preparing for Desktop Vision Appointments for Vision Practices](#) on page 6 for details.
 - **Non-Vision 3 user** - If you do not use Vision 3, this email address is added in Vision 360, see [Using Appointments in a Shared Care Setting](#) on page 12 for details.



4. If you have multiple roles, for example, in a shared care setting, select your role for this session:

vision
A Cegedim Brand

← arow@test2.com
Please choose your role

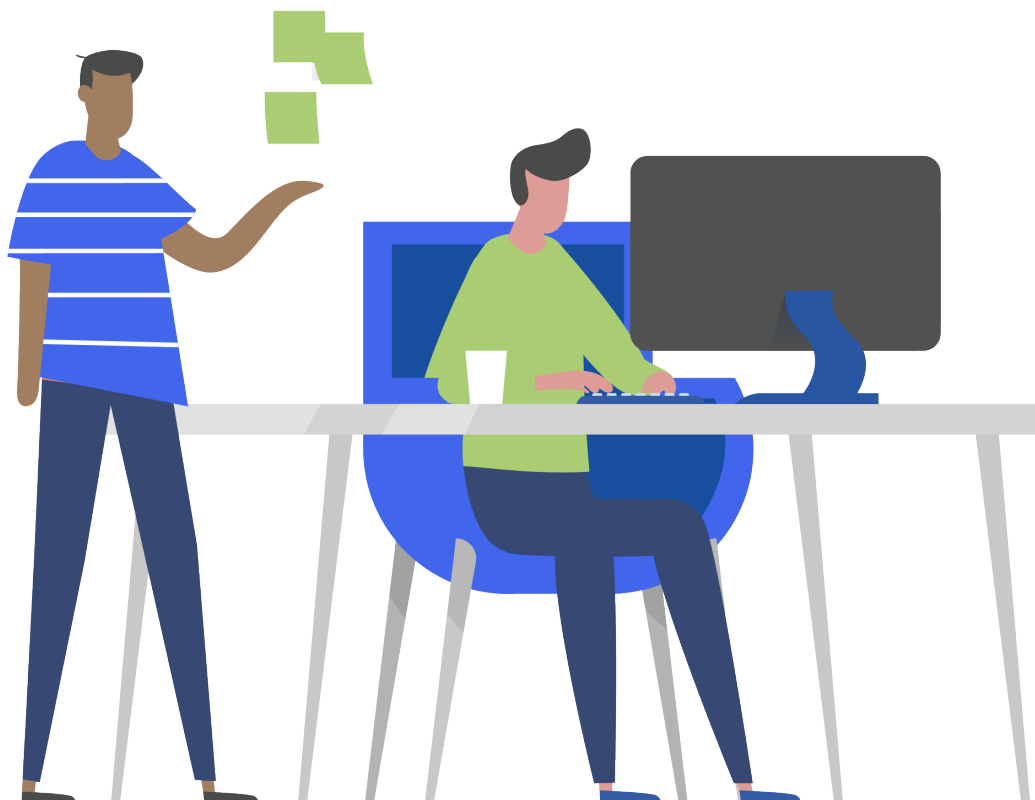
V3 USER: Leeds

V3 USER: Dundee

FEDERATED PRACTITIONER ACCESS: Leeds and Dundee Federated Service

Select from your available roles

5. The **Reception** screen displays ready for use.



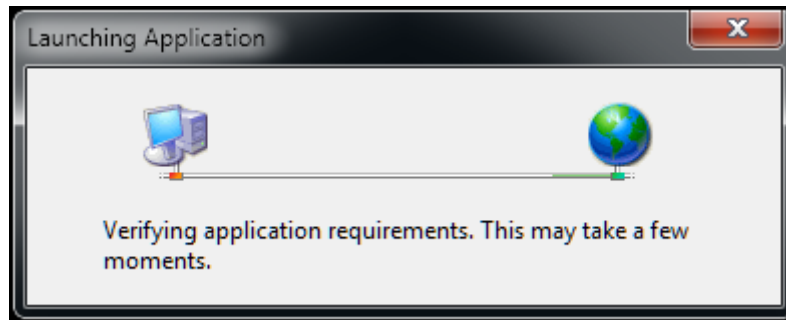


Installing a Appointments Update

If you access **Appointments** from your desktop, when an update is available, you are automatically prompted to download and install as follows:



1. From your desktop, double click **Appointments** in the usual way.
2. The **Launching Application** screen displays for a short while:

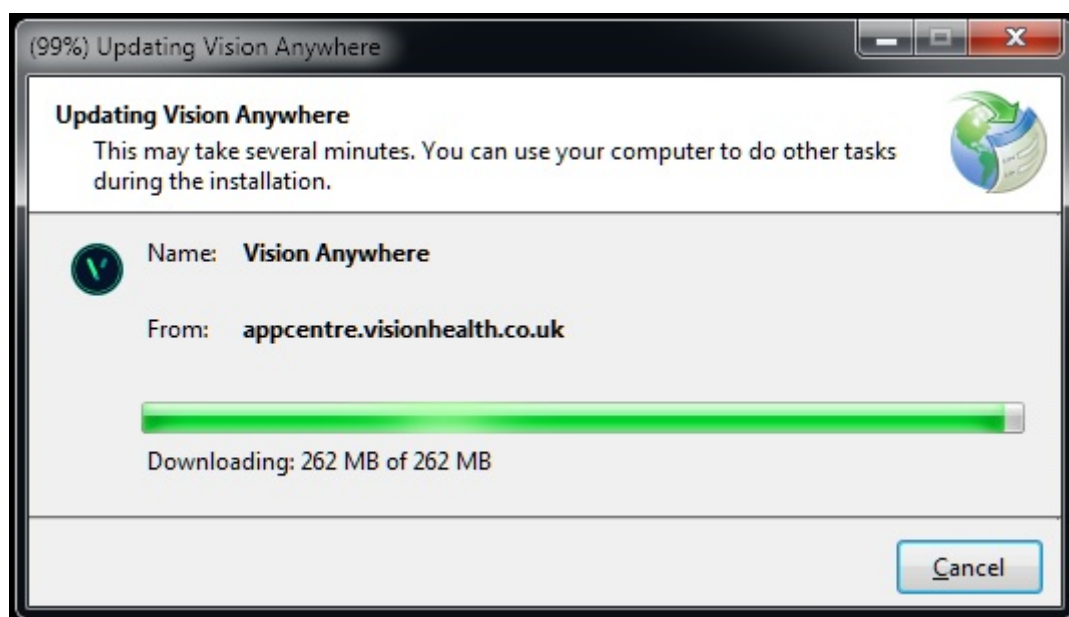


3. If an update is available, the **Update Available** screen displays, select **OK** to continue.



Note - If you do not want to load the update, you can select **Skip**. We do not recommend you repeatedly skip an update, as you will not be on the latest version of the software.

4. The **Updating Appointments** screen displays with a progress bar for the download:



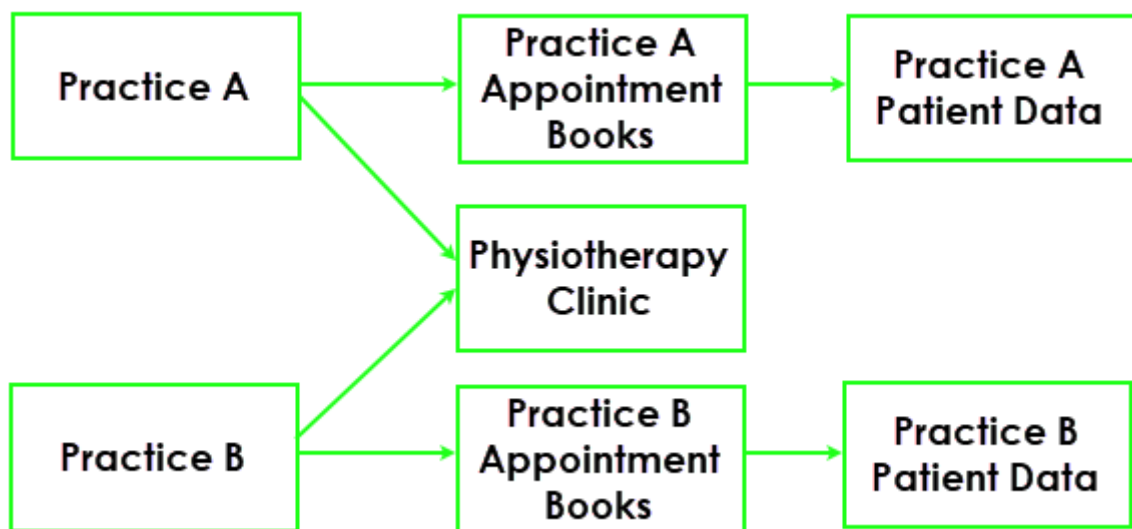
5. Once the update completes, **Appointments** opens in the usual way.



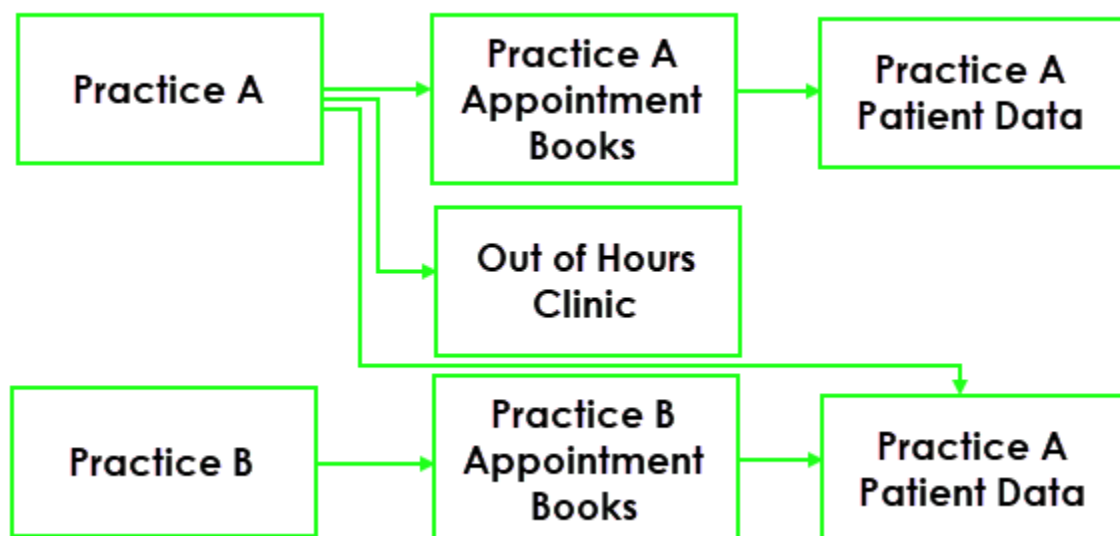
Using Appointments in a Shared Care Setting

Appointments can be used in the following shared care setting:

- **Federations (England) or Clusters (Scotland and Wales)**
 - **A Common Book** - Providing a sharing agreement is set up, multiple practices can access a common appointment book, for example, a Physiotherapy clinic. Each practice can book appointments for their own patients in the shared service and can view their own patient's information, but appointments booked for patients registered elsewhere display as **Booked** with no further information available:



- **Full Shared Care access** - Providing a sharing agreement is set up, a practice can have full access to another practice's patient details, for example, where a practice acts as an 'Out of Hours' service for one or more other practices:





Most **Appointments** functionality is the same whether you are accessing your practice's patients or you are working as part of a shared care organisation.

The following functionality is specific to shared care access:

- **Uploading EMIS patients** - In order to have access to all the EMIS patient data available within your shared care settings, you must upload it to Vision 360.



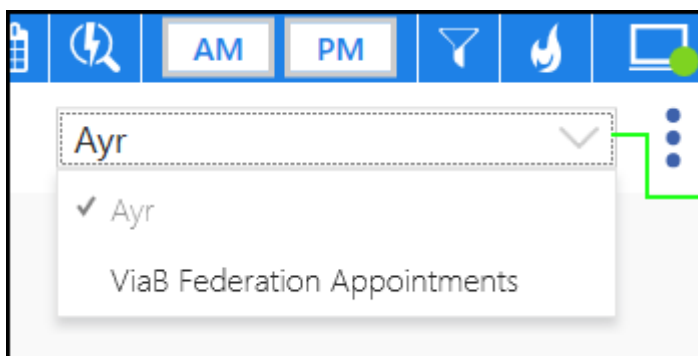
See [Uploading Patients from EMIS to Vision 360](#) for details.

- **Logging in** - To use the shared care options within **Appointments**, you must log in from your Desktop.
- **Selecting Role** - When you login to **Appointments** from your desktop, if you have more than one role assigned to you in Vision 360, you have the option to select your local practice, if you have one, or the shared care service required. Your choice here, determines the initial appointments list(s) offered.



See [Logging onto Appointments from your Desktop](#) on page 9 for details.

You can also change the service you are viewing from within **Appointments**. From relevant screens, a select service option displays, select from the available list as required:

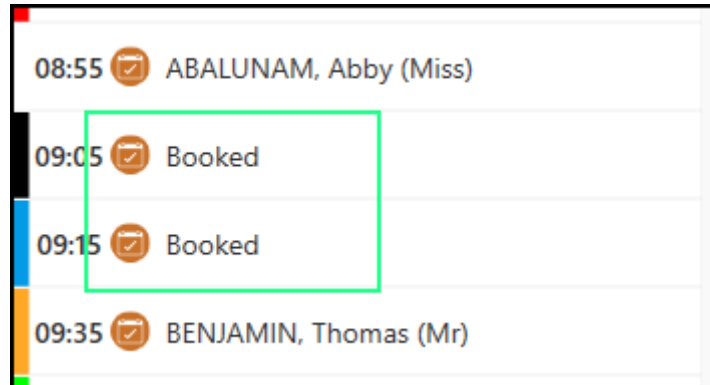


Select to change the service you are viewing

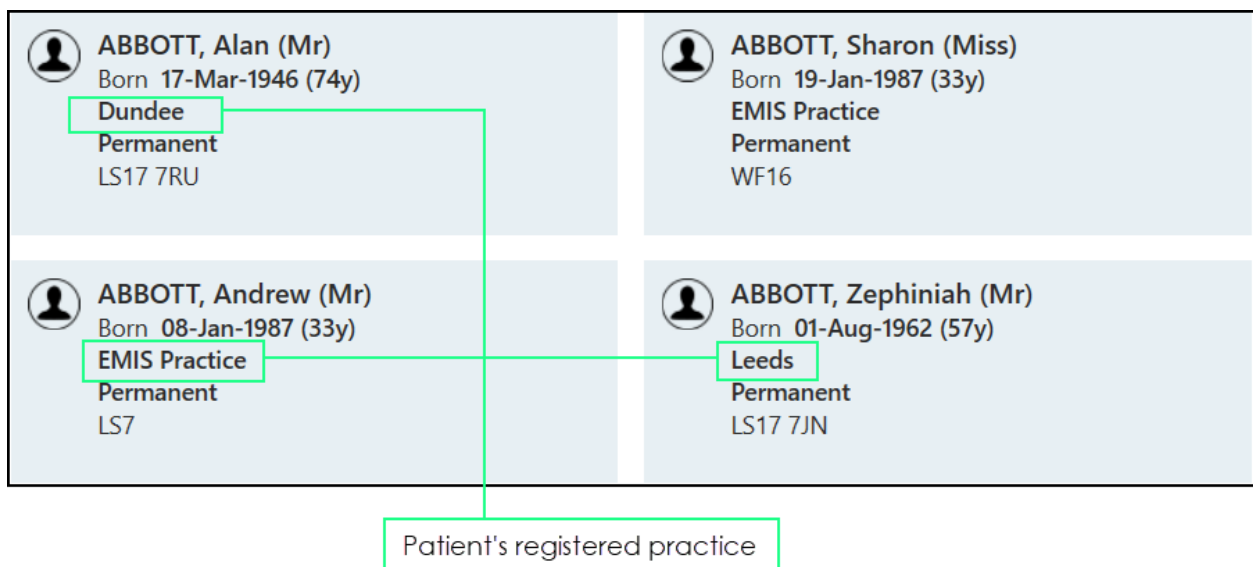


- **Viewing Appointments Booked:**

- **A Common book** - In a shared service with a common book, appointments booked for patients not registered at your practice, display as '**Booked**' in the **Reception view**:



- **Full Shared Care access** - In a full shared care service, the patient name displays in the **Reception view** regardless of their registered practice.
- **Searching for a Patient** - If you have full shared care access, the patient search results include the patient's registered practice:



Important - You cannot access **Appointments Setup** for any practice except your own.



Note - Appointment books for shared care services are currently set up in **Vision 360**, see [Appointments Administration](#) for details.



Organisational Services

User accounts for **Appointments** in a shared care setting are managed in **Organisational Services** part of the **Vision V360** application.

The link and log in details were provided as part of your shared care go live.

User management:

- [Adding a Shared Care User](#) on page 15.
- [Resetting a Password for a Shared Care User](#) on page 20.
- [Unlocking a Shared Care User's Account](#) on page 22.
- [Inactivating a User](#).

Services

- For details on viewing and maintaining data sharing agreements between organisations, see [Service Overview](#).

Audit Trail

- For details on viewing user and patient activity, see [Audit Viewer](#).



See [Organisational Services Help Centre](#) for full details.





Adding a Shared Care User

In order to use **Appointments** in a shared care setting, you must be set up as a user in **Organisational Services** and be added to the service required.

To create a user in **Organisational Services** and then add them to a service:

1. Open your browser and access the **Vision 360 Clinical Portal** using the URL provided by the Vision Data Hub implementation team.
2. Login to the **Vision 360 Clinical Portal** by entering your user name and password and select **Sign In**.

Sign in with your Vision ID

debbie.cuthbert@inps.net [password masked] Sign In

3. From **Please select a Role at a Service**, select **Systems Support Access Role**:

Please select a Role at a Service :

Systems Support Access Role [dropdown arrow]

Sign In Cancel

4. The **Vision 360 Clinical Portal** home screen displays, select



Organisational Services .

5. The **Service Details** screen displays.
6. Check to see if the user already exists, see [Search for a User](#) for details.
 - If the user exists, you can simply add the service required, see [Add a User to a Service](#) on page 18
 - If the user does not exist, they must be added, see [Create a User in Organisational Services](#) on page 17

Now complete the following as required:



Create a User in Organisational Services

1. Open the **Shared Care Service** you want to add the user to, see [Search for Service](#) for details.



2. Select **Create User** and the new **Add User** tab displays:

The screenshot shows the 'Add User' form with the following details:

- User Name:** Joanne.Smith@inps.net
- Surname:** Smith
- Forename:** Joanne
- Title:** Miss
- Sex:** Female
- Display Name:** JSMITH
- Short Name:** JSMIT
- Password:** [Redacted]
- Re-enter Password:** [Redacted]
- Employer:** Shared Care Service
- Department:** [Empty]
- Valid from:** 20-Sep-2017 to [Empty]
- Status:** Active
- Prescriber Number:**

Annotations in the screenshot:

- A red box highlights the **Password** and **Re-enter Password** fields.
- A green box highlights the **Professional Codes** section with the text: "For clinicians, select to add **Professional Codes**".
- Another green box highlights the **Save** button with the text: "Select to save".

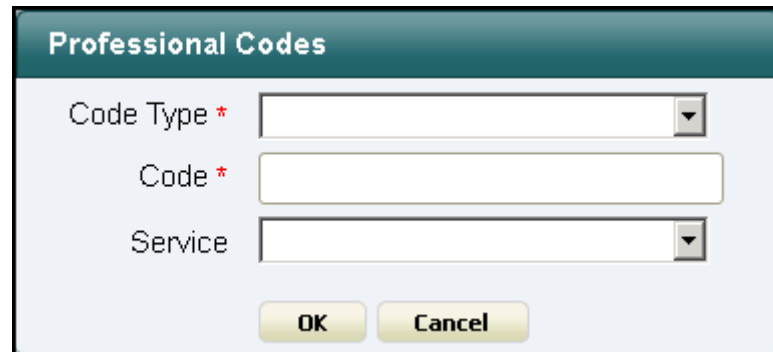
3. Enter the new users details, items marked * are mandatory fields.
 - The password must be a minimum of 6 characters and contain characters from at least three of the following categories:
 - Upper case
 - Lower case
 - Numbers
 - Non-alphanumeric characters: ~!@#\$%^*_-=+`|\(){}[]:;'.?/
 - No spaces at the beginning or end of the password
 - The password must not contain three or more consecutive characters (case insensitive) from the user name, forename or surname.
4. For clinicians we recommend you add any relevant **Professional Codes**, for example, a GMC code:



Adding Professional Codes

a. From **Professional Codes**, select **Add** .

b. The **Professional Codes** screen displays:



The screenshot shows a dialog box titled "Professional Codes". It contains three input fields: "Code Type *" (a dropdown menu), "Code *" (a text input field), and "Service" (a dropdown menu). At the bottom of the dialog are two buttons: "OK" and "Cancel".

c. Complete as required:

- **Code Type** - Select the type of code to record
- **Code** - Enter the code
- **Service** - Select from the list of services available for this user.

d. Select **OK**.

5. Select **Save** .






Add a User to a Service

1. Open the **Shared Care Service** view, if you have just created the user, this is still open at the top of your screen.
2. Select **User Roles**:

Enter the users details and then select **Search**

Select **Users Add**

Select the user required from the list offered

3. Select **Users Add...**
4. Enter user's details in the search bar and select **Search** .
5. Select the user from the results.
6. The user is assigned to the shared care service.
7. Tick next to the user's name under the appropriate heading, to allocate their role.



Note - To remove rights from a user, simply untick the box.



See [Organisational Services Help Centre](#) for full details.



Resetting a Password for a Shared Care User

To reset a password for a shared care user:



Note - If you are not a system manager, you can only reset your own password.

1. Open your browser and access the **Vision 360 Clinical Portal** using the URL provided by the Vision Data Hub implementation team.
2. Login to the **Vision 360 Clinical Portal** by entering your user name and password and select **Sign In**:

Sign in with your Vision ID

debbie.cuthbert@inps.net

.....

Sign In

3. Select your **Systems Support Access Role**:

Please select a Role at a Service :

Systems Support Access Role

Sign In Cancel



4. Select **Organisational Services**.
5. In the search box, type part of the locked user's name or email and select **Search**.

sysadmin
Root Registration Authority Manager - SYSTEM

New Tab x New Tab x +

jane

BIRCH, (Dr) **Jane**, jbirch@test2.com, Dr **Jane** Birch

CRICHTON, (Dr) **Jane**, jcric12@hog.com, **Jane** Crichton

JONES, (Mrs) **Jane**, jjones21@hog.com, **Jane** Jones

LOCUM, (Dr) **Jane**, janelocum@naechess.net, **Jane** Locum

NORTH, (Dr) **Jane**, north@email.com, **Jane** North

RECEPTIONIST, (Miss) **Jane**, jane.reception@example.org, **Jane** Receptionist

Enter part of the user's email or name

A list of possible matches displays, select as appropriate

6. All matching results display, select the user required.
7. The **Edit User** screen displays with the **Details** tab selected.
8. In **Password**, enter a new password.



9. In **Re-enter Password** enter the new password again to confirm:

User Details screen

The screenshot shows a web browser window with the title 'Jane North'. The page is titled 'User Details screen'. On the left, there is a navigation menu with 'Details', 'Roles', 'Apps', and 'Vision 3'. The main content area shows user details for 'Jane North' with fields for Surname, Forename, Title, Sex, Display Name, Short Name, Password, Re-enter Password, Employer, Department, Valid from, Status, and Prescriber Number. The 'Password' and 'Re-enter Password' fields are highlighted with a green box and a callout that says 'Enter the new password and then enter it again to verify'. The 'Save' button is also highlighted with a green box.

10. Select **Save**.



Note - The following password validation rules apply when resetting a user's password:

- Minimum of 6 Characters
- Contain Upper and Lower case Letters
- Contain Numbers
- Contain Non-alphanumeric symbols (for example & \$ % etc)
- Password from the last 5 passwords cannot be used.



See [Organisational Services Help Centre](#) for full details.



Unlocking a Shared Care User's Account

After three unsuccessful attempts at logging in, users are locked out of **Appointments** and the locked out message displays.

To unlock a shared care user's account:

1. Open your browser and access the **Vision V360 Clinical Portal** using the URL provided by the Vision Data Hub implementation team.
2. Login to the **Clinical Portal Vision 360** by entering your user name and password and select **Sign In**:

3. Select your **Systems Support Access Role**:

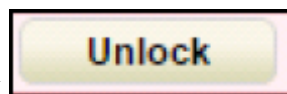
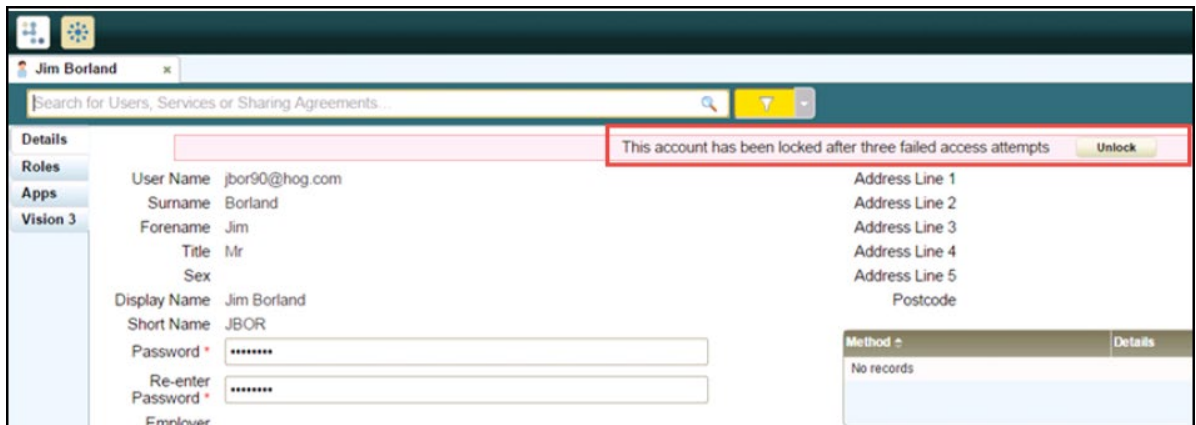


4. Select **Organisational Services**.
5. In the search box, type part of the locked user's name or email and select **Search**.

6. All matching results display, select the user required.
7. The **Edit User** screen displays with the **Details** tab selected.



8. The **This account has been locked after three failed access attempts** message displays at the top of the **Details** screen:



9. Select **Unlock**



See [Resetting a Password for a Shared Care User](#) on page 20 and [Organisational Services Help Centre](#) for full details.





Searching for a Patient

The way you search for a patient depends on how you access **Appointments**:

- If you access **Appointments** through the **Vision 3 Home screen**



you can search for a patient using the following options:

- Surname - In full or part, for example, Smith or Smi.
- Surname, Forename - You must use the comma between the names, for example, Smith, John.
- Surname, Forename, Date of Birth - In full or part, for example, Smith, John, 1980.
- Surname, Date of Birth - In full or part, for example, Smith, 091980.
- Date of Birth - In full or part, see the following examples:

Full Date of Birth

- You can enter the full date of birth in the following ways:
- DDMMYY, for example, 9th December 1980 would be 091280.



Note - Only valid for patients born within the last 100 years.

- DDMMYYYY, for example, 9th December 1980 would be 09121980.
- DDMMMYYYY, for example, 9th December 1980 would be 09DEC1980.

Partial Date of Birth

- You can enter the partial date of birth in the following ways:
- YYYY, for example, 1980.
- MMYYYY, for example, 091980.
- MMMYYYY, for example, DEC1980.



- If you access **Appointments** from your **Desktop** you can search for a patient using the following options:
 - Surname - In full or part, for example, Smith or Smi.
 - Surname Forename - There is no comma between the names, for example, Smith John.
 - Date of Birth - In full or part, see the following examples:

Full Date of Birth

- The full date of birth can be typed as:
 - DDMMYY, for example, 9th December 1980 would be 091280.



Note - Only valid for patients born within the last 100 years.

- DDMMYYYY, for example, 9th December 1980 would be 09121980.
- YYYY-MM-DD, for example, 9th December 1980 would be 1980-12-09.

Partial Date of Birth

- The partial date of birth can be typed as:
 - YYYY, for example, 1980.
 - MMYYYY, for example, 091980.
- Postcode - In full or part, for example, AB12 3CD or AB12.
- NHS/CHI Number.



Sorting Patient Search Results

If you receive a high number of results, you can use the available sorting options to group the results and navigate them with greater ease:



To sort the patient search results:

1. Select the required sorting option, for example **Age**
2. The search results sort accordingly.



Note - Only one sorting option can be applied at a time.



Note - After applying a sorting option, the results display in ascending order



Select the sorting option again to display the results in descending order

