Vision Appointments Setup Release v2.3

Vision Appointments Setup release v2.3 contains the following updates:

Vision Appointments

- **Open Vision Appointments** - You can now open the **Vision Appointments** app from within **Vision Appointments Setup**, right click on any session and select **View in Vision Appointments**.

Vision Appointments Setup

- **GP Connect functionality** - England only, **Vision Appointments Setup** is now ready for **GP Connect Appointments** to be enabled at your practice, we will announce the release of this functionality as soon as all the components are in place.

- **Import/Export Session Templates** - To enable you to share **Session Templates** across different practices, you can now import and export them from Vision Appointments Setup.

  See Exporting and Importing Session Templates on page 5 for details.

- **Ad-Hoc Book Management** - From the **Extension Plan** screen, to access the **Ad-Hoc Book Management** screen, you can either:

  - Select **Edit Live Appointment Books** , or
  - Right click on owner and select **Manage appointments**

  From the **Ad-Hoc Book Management** screen, you can now:
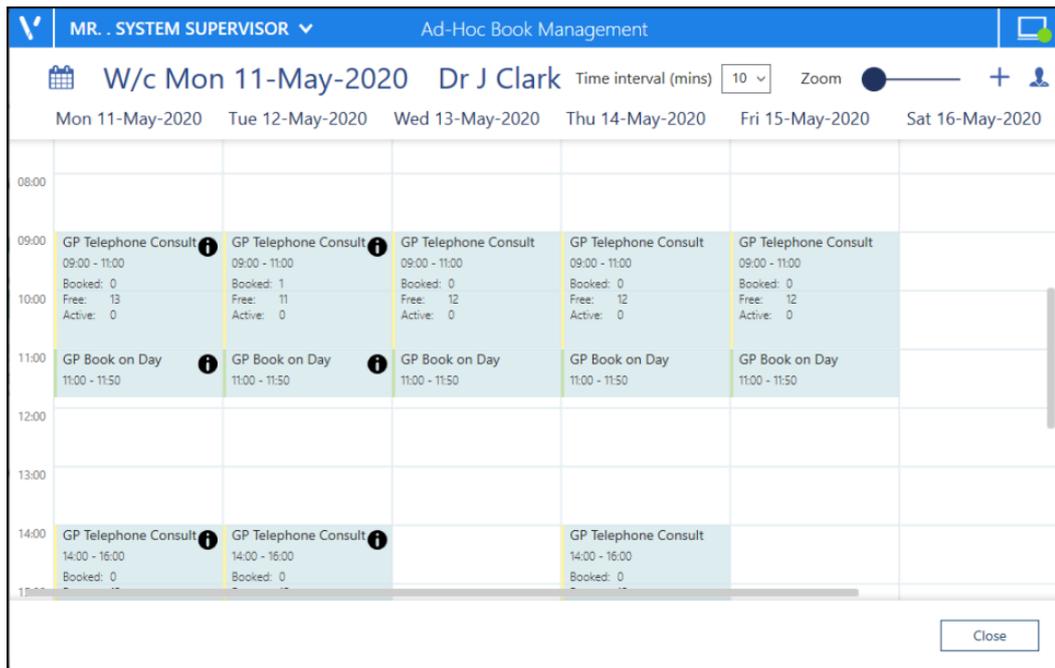
- Customise the view enabling you to see multiple days for multiple clinicians to facilitate the copying or moving of sessions without having to change screens. Simply select **Add or remove book owners** , select the initial book owner and select a date from the calendar. Repeat these steps until all the book owners with session you wish to copy or move display on the **Ad-Hoc Book Management** screen.
- Differentiate between **Moving** and **Copying** a session to a different day, time or book owner:
  - **To Copy** - When you hold the Control key (Ctrl), and drag and drop a session a blank session is copied to the new day, time and owner
  - **To Move** - When you simply drag and drop a session, it is moved complete with any appointment bookings to the new day, time and owner
- Change the **Time intervals** from 5 - 60 minute increments allowing you more control over the times you set your session to start. Simply select the time required:
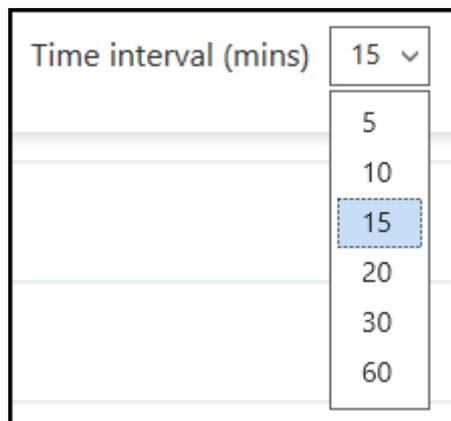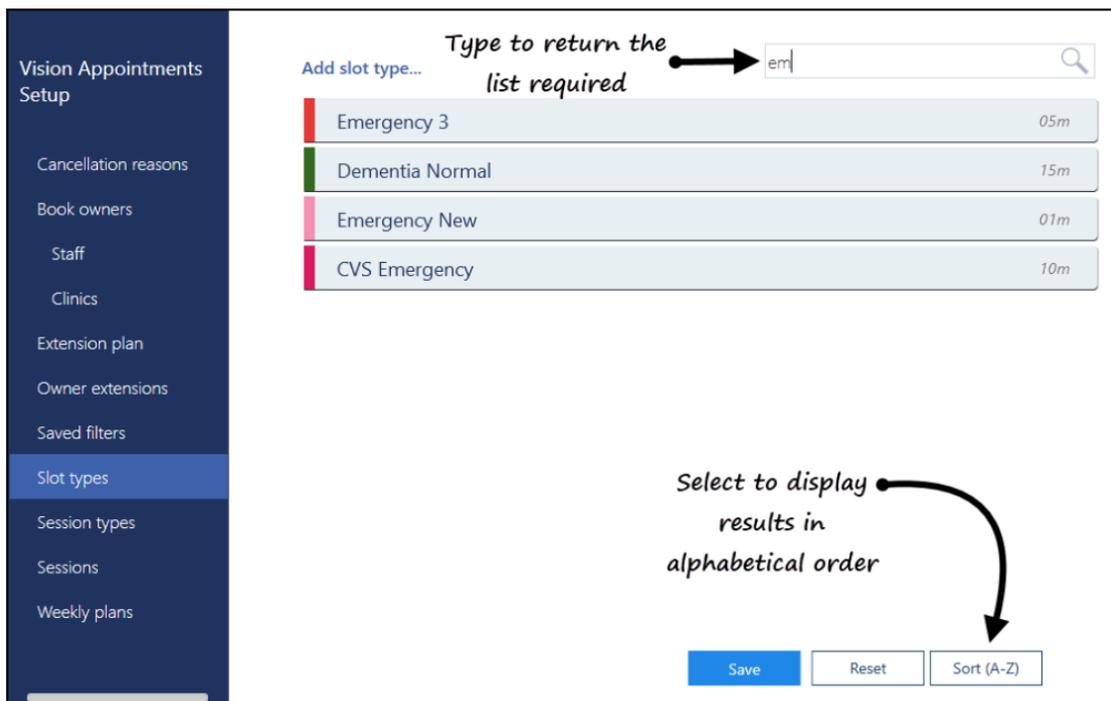

This setting is saved for future use ad-hoc changes.

- When you access the **Ad-Hoc Book Management** screen from, **Extension plan** - Right click on an owner and select **Manage appointments**, you can now select the current or any future week, simply select the **Calendar** and choose the date required.
- The session information on the **Ad-Hoc Book Management** screen displays and updates as appointments are booked:

Note - Where a session is too short to display the information, hover your mouse over the session to display it.

- **Slot Utilisation** - When you select **Get counts** , your slot utilisation is now calculated for all scheduled sessions, not just those on a weekly template.
- **Smarter Searches**:
  - You can now type to search on the **Sessions** and **Slot Types** lists. A smart search returns the items as you type.
  - The following lists now have a **Sort (A-Z)** option to display the data in alphabetical order:
    - **Cancellation reasons**
    - **Slot Types**
    - **Session Types**
    - **Sessions**

General

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

    - The green light indicates you are connected.

    - The amber light indicates a problem with some of your services.

    - The red light indicates a problem with your connection.

Exporting and Importing Session Templates

To enable you to share session templates across different practices, you can export and import them.
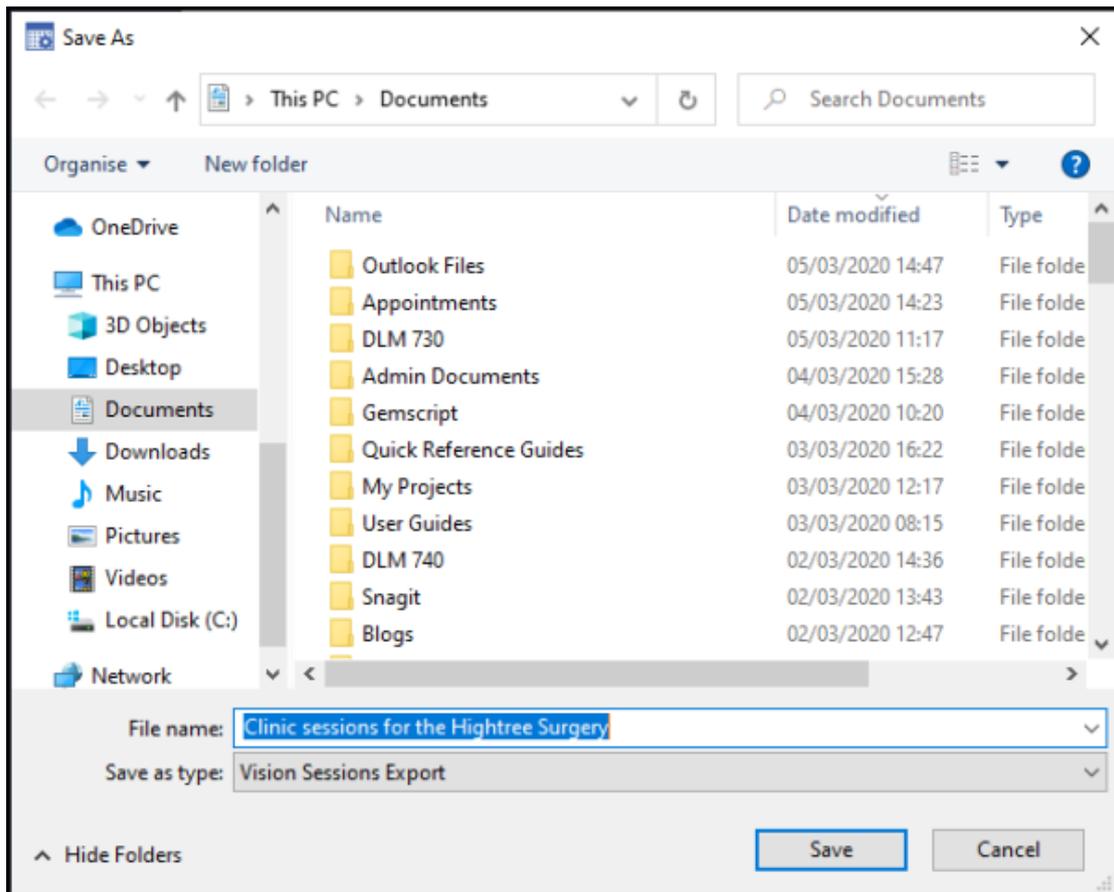
Exporting a Session Template

To export a session template for a different practice to use:

1. From **Vision Appointments Setup**, select the **Main Menu** .
2. Select **Sessions** and the list of available sessions displays.

3. Select the session template(s) you wish to export and select **Export** .
4. The **Export Session Template(s)** screen displays the sessions you have selected:
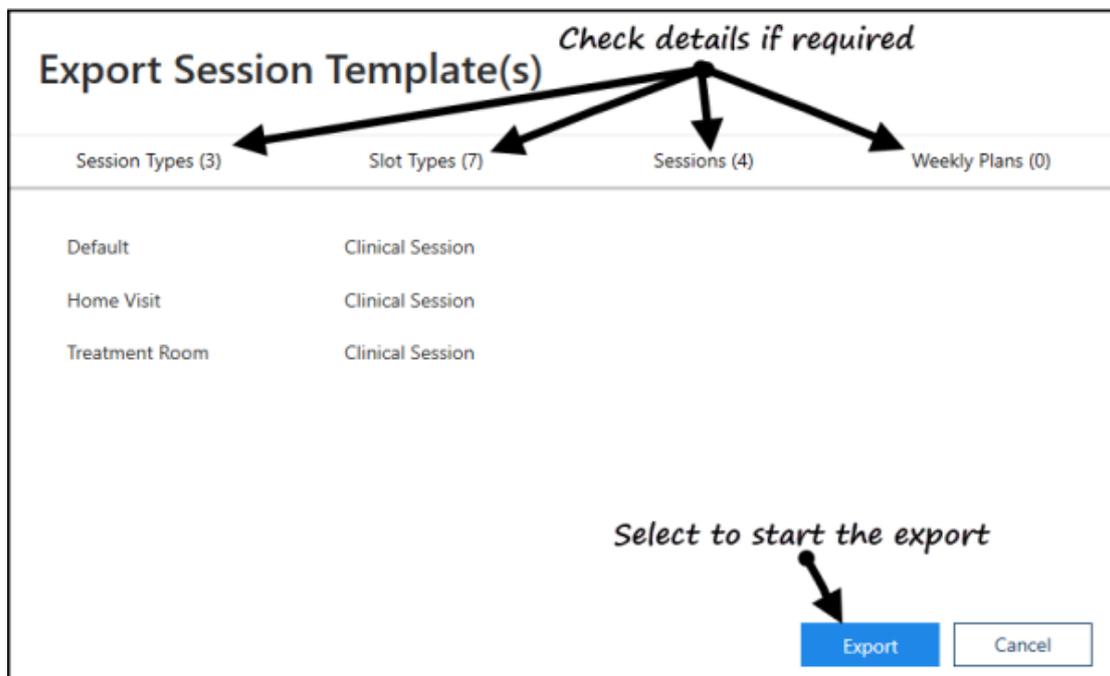
5. Check the details of the selected sessions and then select **Export** .
6. The **Save As** screen displays, navigate to where you want to save the **Vision Sessions Export** file, give the file an appropriate name and select **Save**:

7. Your Sessions are now ready to be sent via email.

Importing a Session Template

To import a session template from a different practice:

Note - Before you start this process, you must have received the **Vision Sessions Export** file and saved it to an accessible location within your network.

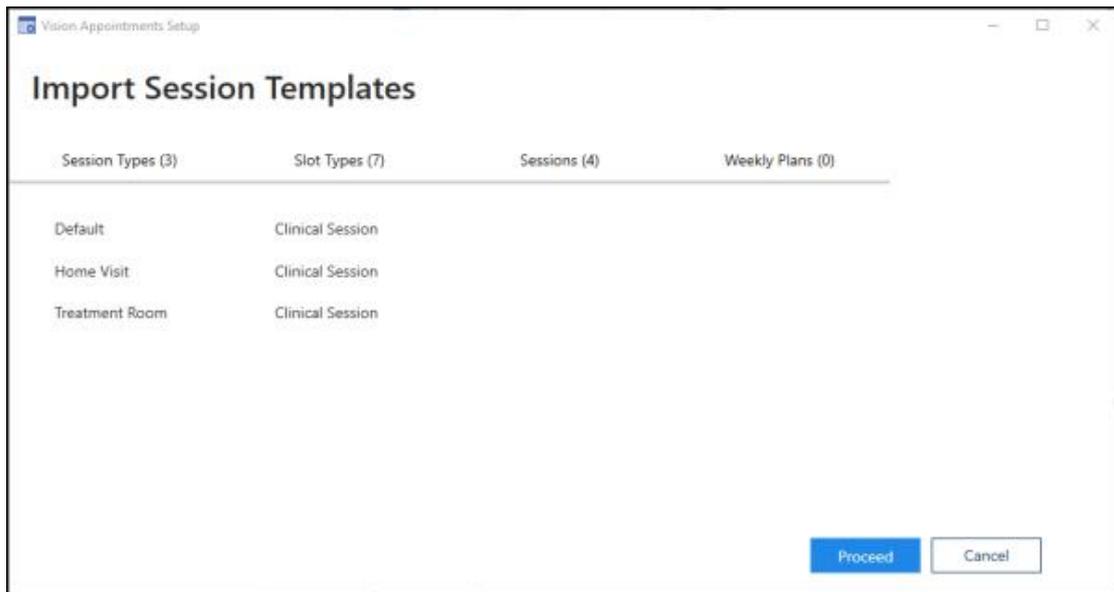1. From **Vision Appointments Setup**, **Extension plan** screen, select **Import Setup Data** [↑]().

2. The **Open** screen displays, navigate to where you saved the incoming **Vision Sessions Export** file:
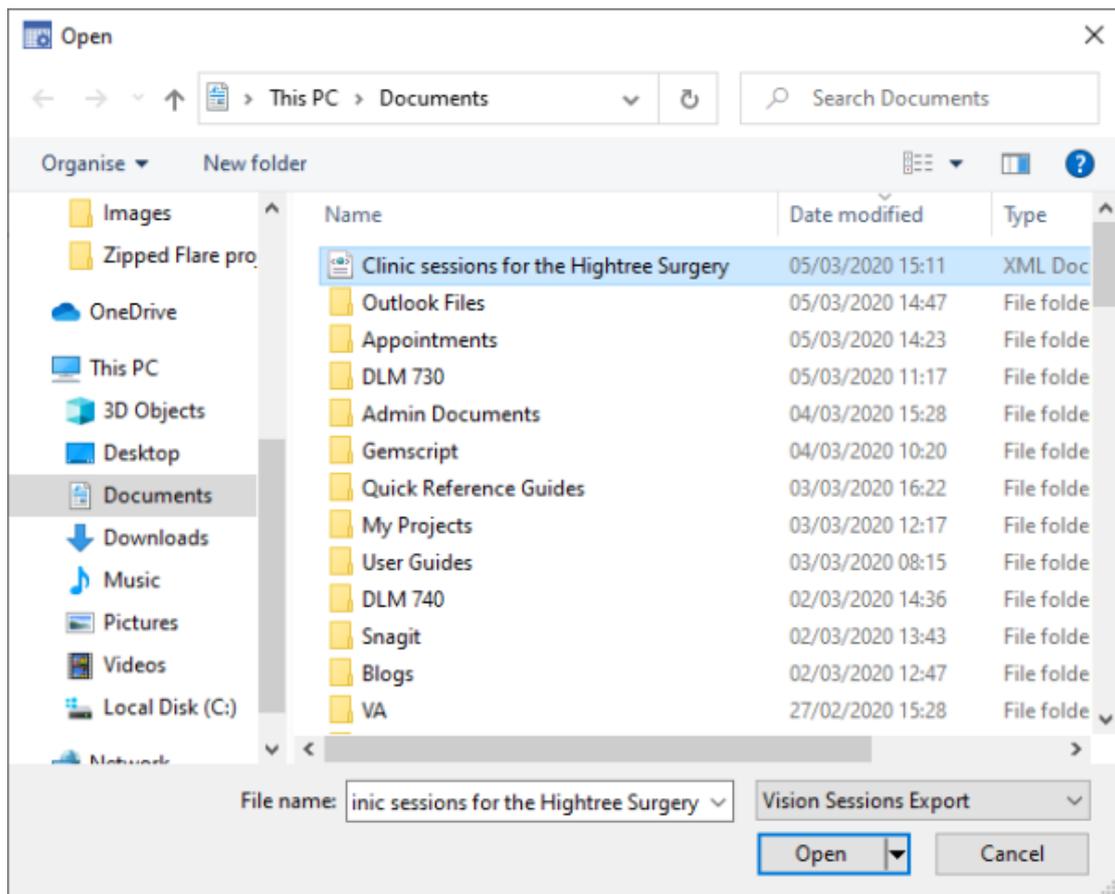

3. Select **Open** and the **Import Session Templates** screen displays:

4. Check the details you are importing and then, select **Proceed** .
5. The **Import Wizard - Session Types** screen displays, detailing any warnings relating to the sessions, for example duplicated session names. Providing you are sure, select **Proceed** .
6. The **Session Types list has been updated** message displays, select **OK**.
7. The **Import Wizard - Slot Types** screen now displays any warnings relating to slots you are importing. Providing you are sure, select **Proceed** .
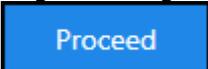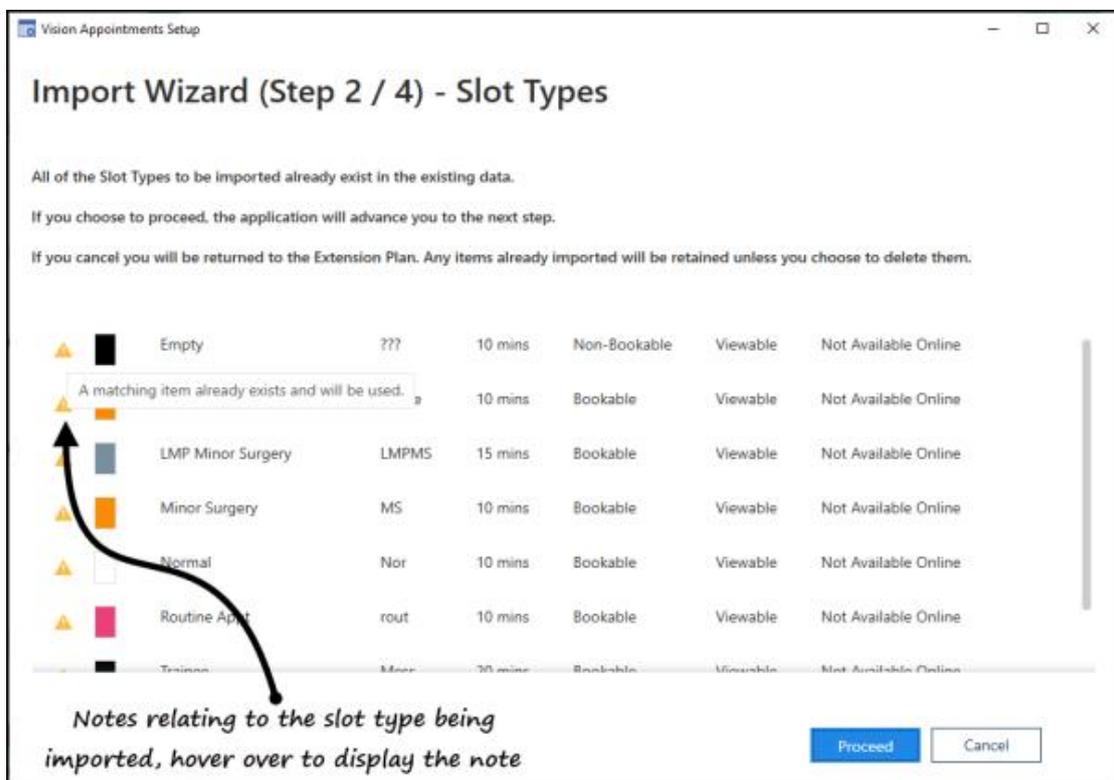
8. The **Slot Types list has been updated** message displays, select **OK**.

9. The **Import Wizard - Session** screen displays, select **Proceed** Proceed .
10. The **Sessions list has been updated** message displays, select **OK**.
11. **Vision Appointments Setup** restarts and the imported sessions are now ready to be updated if required and used in your plans.