

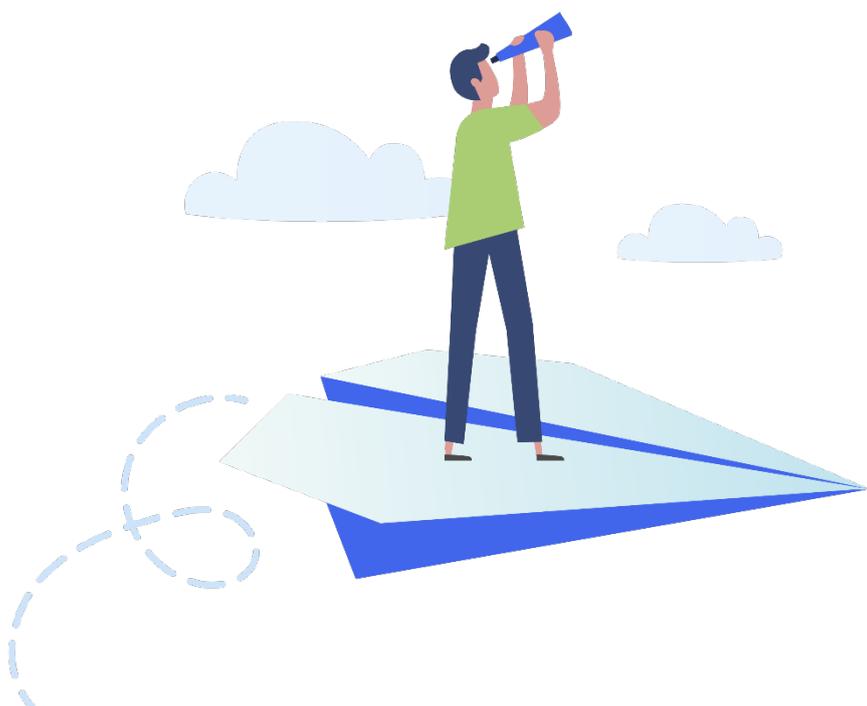


Appointments

Appointments Setup 3.2 Release Guide

Version 1.3

20 July 2022





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Appointments Setup Release 3.2

Summary of Changes

 **Important** - For full functionality you must be on **Vision 3 DLM 830**.

Appointments Setup release **3.2** contains the following new features and improvements:

- **Slot Types** - The following changes have been made to **Slot Types**:

 **Important** - Slot Type Restrictions do not apply for web enabled slots when being booked by your patients.

- **Restrictions** - To prevent bookings being made for specific patient types in specific slot types you can create a list of **Restrictions**. **Restrictions** can be set by age and/or sex, for example, you can apply a female only **Restriction** to maternity slot types, or age restrictions to Baby Clinic slot types.

 See [Appointment Restrictions](#) on page [6](#) for more details.

- **Slot Type - Restrictions** - You can apply **Restrictions** to appointment slot types to prevent bookings from being made for specific patients in specific slots.

 See [Applying Slot Type Restrictions](#) on page [13](#) for more details.

- **Booking Availability** - You can now limit the appointment booking availability by number of hours as well number of days. To set the number of hours in advance a slot can be booked:

1. From **Appointments Setup**, select **Slot types**  from the **Appointments Setup** menu.
2. Select the slot you want to update.
3. Select **Available for booking - Hours prior** to set how many hours in advance the slot can be booked.



Appointments

- **Linked Appointment Warnings** - You can view a Linked appointment warning when updates are made in either **Extension Plan** or **Ad-hoc Book Management** that affect linked appointments created in **Appointments**.



See [Linked Appointment Warning](#) on page [16](#) for more details.



See [Appointments Release 3.2](#) for details about what's new in **Appointments**.



Appointment Restrictions

To prevent bookings being made for specific patients in specific slot types you can create a list of **Restrictions**. **Restrictions** can be set by age and/or sex, for example, you can apply a female only **Restriction** to a maternity slot type, or age restrictions to a baby clinic slot type.



Important - Slot Type Restrictions do not apply for web enabled slots when being booked by your patients.

Restrictions - Age

To add a **Restriction** defined by age:

1. From the **Appointments Setup** menu, select **Restrictions**
2. The existing restrictions display:

Restrictions

MR. DON DEWAR

Booking methods

Cancellation reasons

Book owners

- Staff

- Clinics

Extension plan

Owner extensions

Restrictions

Saved filters

Slot types

- Practice

- Restrictions

Session types

Sessions

Weekly plans

Add restriction... Search restrictions...

50 and over

NEW RESTRICTION TO BE DELETED

This is a very long name for testing testing This is a very long name for testing testing T1

Two years and under-1

Under 50

Boy Only

Female only

Restriction1-res

Save Reset

3. Select **Add restriction**

Add restriction...



4. The **Create Slot Type Restriction** screen displays:

Create Slot Type Restriction

Description
0 months to 24

Type
Age

Minimum age
 Restricted

Maximum age
 Restricted

24

Years
Years
Months

Apply Cancel

Enter a description of the restriction

Select **Age** as the type of restriction

Tick to add a minimum age restriction

Tick to add a maximum age restriction

Select from either **Years** or **Months**

Add a value

Complete the details of the restriction as required:

- **Description** - Enter the description of the restriction.

 **Note** - Duplicated Restriction descriptions are not allowed, should you attempt to create one an error message displays.

- **Type** - Select **Age**.
- **Minimum age** - Tick **Restricted** if you want to apply a minimum age restriction. Enter the numeric value and then select **Years** or **Months** from the available list.
- **Maximum age** -Tick **Restricted** if you want to apply a maximum age restriction. Enter the numeric value and then select **Years** or **Months** from the available list.

 **Note** - You must apply at least one restriction.

5. Select **Apply** to add the restriction.



Restrictions - Sex

To add a **Slot Type Restriction** defined by sex:

1. From the **Appointments Setup** menu, select **Restrictions**
2. The existing restrictions display:

Restrictions

MR. DON DEWAR

Booking methods

Cancellation reasons

Book owners

- Staff
- Clinics

Extension plan

Owner extensions

Restrictions

Saved filters

Slot types

- Practice
- Restrictions

Session types

Sessions

Weekly plans

Add restriction... Search restrictions...

- 50 and over
- NEW RESTRICTION TO BE DELETED
- This is a very long name for testing testing This is a very long name for testing testing TI
- Two years and under-1
- Under 50
- Boy Only
- Female only
- Restriction1-res

Save Reset

3. Select **Add restriction**

Add restriction...



4. The **Create Slot Type Restriction** screen displays:

The screenshot shows the 'Create Slot Type Restriction' form. It has three main sections: 'Description', 'Type', and 'Allowed sex'. The 'Description' field contains 'Female Only'. The 'Type' dropdown is set to 'Sex'. The 'Allowed sex' dropdown is open, showing 'Male only' and 'Female only' options, with 'Female only' selected. Callout boxes on the left point to these fields: 'Enter a description of the restriction' points to the Description field, 'Select **Sex** as the type of restriction' points to the Type dropdown, and 'Select the **Allowed sex**' points to the Allowed sex dropdown. At the bottom right, there are 'Apply' and 'Cancel' buttons.

Complete the details of the restriction as required:

- **Description** - Enter the description of the restriction.



Note - Duplicated Restriction descriptions are not allowed, should you attempt to create one an error message displays.

- **Type** - Select **Sex**.
- **Allowed sex** - Select the sex that you want to allow bookings to be made for, preventing bookings from being made for the opposite sex.



Note - You must apply at least one restriction.

5. Select **Apply** to add the restriction.



Editing Restrictions

i Important – You must log out and restart **Appointments** for **Restriction** updates to take effect.

You can update the details of a **Restriction** if required:

1. From the **Appointments Setup** menu, select **Restrictions** .
2. The **Restrictions** list displays. Select the restriction you want to update.
3. If it is only the name that needs updating, simply select the name and update it:



If you are updating the criteria, select **Edit** and the **Edit Slot Type Restriction** screen displays:



Edit Slot Type Restriction

Description
0 months to 24

Type
Age

Minimum age
 Restricted 1 Months

Maximum age
 Restricted 24 Months

Apply Cancel

4. Update the details as required.

5. Select **Apply**  to save the changes.

6. Select **Save** to save your changes or **Reset** to cancel any changes:

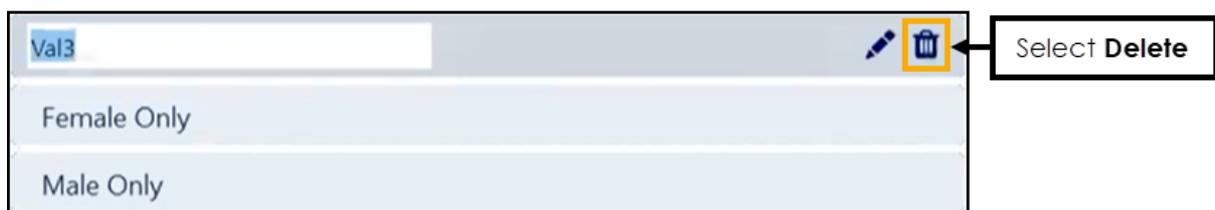


Deleting Restrictions

 **Important** – You must log out and restart **Appointments** for **Restriction** updates to take effect.

You can delete **Restrictions** that are no longer required:

1. From the **Appointments Setup** menu, select **Restrictions** .
2. The **Restrictions** screen displays, select the restriction no longer required, and select **Delete**  to remove it:



 See [Applying Slot Type Restrictions](#) on page [13](#) for more details.



Applying Slot Type Restrictions

You can allocate **Restrictions** to appointment **Slot Types** to prevent bookings from being made for specific patients in specific slots, for example, you can apply a female only **Restriction** to a maternity slot type, or age **Restrictions** to a baby clinic slot type.

 **Important** - Slot Type Restrictions do not apply for web enabled slots when being booked by your patients.

 See [Appointment Restrictions](#) on page 6 for details on adding **Restrictions**.

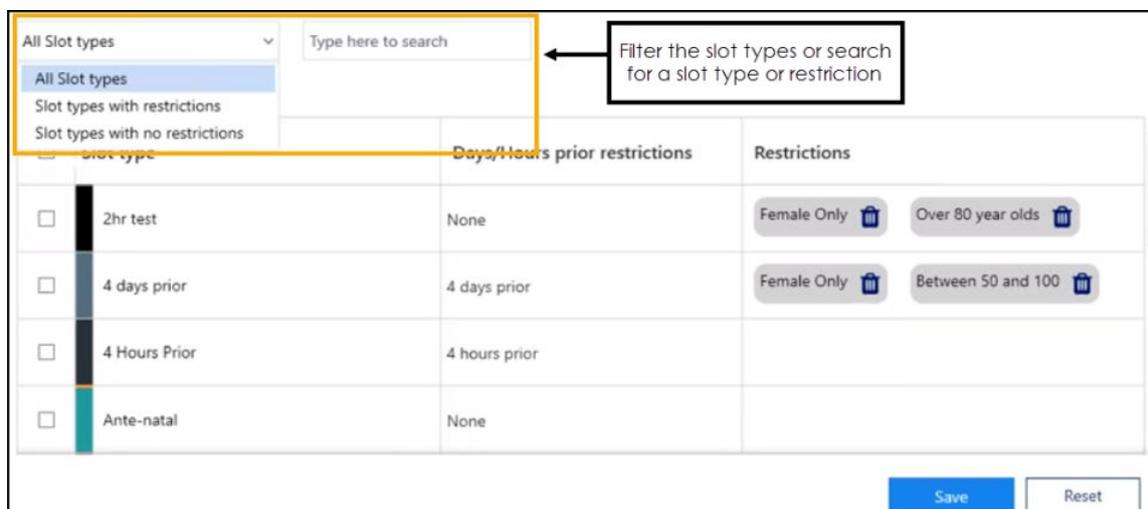
Applying a Restriction to Slot Types

To apply a **Restriction** to a slot type:

1. From the **Appointments Setup menu**, select **Slot types - Restrictions**



2. The existing appointment slot types and restrictions display, filter the slot types, if required:



Slot type	Days/Hours prior restrictions	Restrictions
<input type="checkbox"/> 2hr test	None	Female Only  Over 80 year olds 
<input type="checkbox"/> 4 days prior	4 days prior	Female Only  Between 50 and 100 
<input type="checkbox"/> 4 Hours Prior	4 hours prior	
<input type="checkbox"/> Ante-natal	None	

Save Reset

 **Note** - The search feature only searches on the **Slot type** and **Restrictions** columns.



Appointments

3. Tick the individual or multiple slot types to apply a restriction:

Slot type	Days/Hours prior restrictions	Restrictions
<input checked="" type="checkbox"/> 1 hour prior	23 hours prior	
<input checked="" type="checkbox"/> 1 Hour Prior GPC	1 hours prior	
<input type="checkbox"/> 1DayPrior	1 days prior	
<input type="checkbox"/> 1WeekPriorSlot	7 days prior	
<input type="checkbox"/> 2 Days Prior	2 days prior	

Callouts: 'Tick to select all slot types' points to the top checkbox; 'Tick to select individual slot types' points to the checkboxes for '1 hour prior' and '1 Hour Prior GPC'. A 'Select Add restriction' callout points to the 'Add restriction' button.



Training Tip - You can individually select multiple slots or tick the top option to select all the slots in the list.



4. Select **Add restriction**
5. A list of the **Restrictions** displays, Select a **Restriction** to apply it to the slot type(s):

Search restrictions...

- 50 and over
- Boy Only
- Two years and under-1
- Under 50

Cancel

6. Select **Save** to save your changes or **Reset** to cancel any changes:



Note - If you apply multiple restrictions to the same slot type, they display in the following order - sex, numerical and then alphabetical.



Removing Restrictions from Slot Types

To remove a **Restriction** from a slot type:

1. From the **Appointments Setup** menu, select **Restrictions** 
2. The appointment slot types and their restrictions display, you now have the following options:

- Select **Delete**  on a restriction to remove it individually:



or

- Select a slot type and then select **Remove restrictions**  to remove all the restrictions applied:

Slot type	Days/Hours prior restrictions	Restrictions
<input checked="" type="checkbox"/> Slot type		
<input checked="" type="checkbox"/> 4 days prior	4 days prior	Female Only Between 50 and 100
<input checked="" type="checkbox"/> 4 Hours Prior	4 hours prior	Over 80 year olds
<input checked="" type="checkbox"/> Advance	3 days prior	Over 80 year olds
<input checked="" type="checkbox"/> Ante-natal	None	



Training Tip - You can individually select multiple slots or tick the top option to select all the slots in the list.

4. Select **Save** to save your changes or **Reset** to cancel any changes:



See [Appointment Restrictions](#) on page 6 for more information.



Linked Appointment Warnings

Within **Appointments** you can create linked appointments, for example a recurring appointment for ongoing tests. A linked appointment warning displays when changes are made in either **Extension Plan** or **Ad hoc Book Management** that affect linked appointments created in **Appointments**.

A warning icon displays in the toolbar:

-  - No linked appointment warnings.
-  - Linked appointment warnings.

Viewing Linked Appointment Warnings

To view link appointment warnings:

1. From the toolbar at the top of the screen select **Linked appointment**

warnings  and the Linked appointment warnings screen displays:

Linked appointment warnings

 You have made changes to Linked Appointments for the following patients. You can review your changes here.

ABALUNAM, John (Mr)	Leeds	01-Aug-1953 (68y) - 811 112 3191		
				

[Clear list and close](#) [Close](#)

2. Complete as follows:

- Select **Link**  to view the changes to the link appointments.

 See [Viewing Linked Appointment Changes](#) on page [17](#) for more details.

- Select **Delete**  to delete the link.
- Select **View Patients Scheduled Appointments**  to view the patients scheduled appointments.



3. Select either:
 - **Clear list and close** - To clear the warnings and close the **Linked appointment warnings** screen.
 - **Close** - To close the **Linked appointment warnings** screen without clearing the warnings.

Viewing Linked Appointment Changes

To view the **Linked appointments changes** screen:

1. From the **Linked appointment warnings** screen, select **Link**  and the **Linked appointments changes** screen displays:

Linked appointments changes

Before	After
21-Oct-2021 09:10 CLSUN Leeds	21-Oct-2021 09:10 CLSUN Leeds
21-Oct-2021 10:50 CLDC Leeds	21-Oct-2021 10:50 CLDC Leeds
21-Oct-2021 12:00 JETES Shared Appointment Books	

[Close](#)

You can see from this example that the first linked appointment (12:00pm on the 21st October) is cancelled, and no longer displays under the **After** heading.

2. Select **Close**  to close the **Linked appointments changes** screen.



Examples of linked appointment changes:

Appointment cancelled

Linked appointments changes	
Before	After
10-Jul-2021 09:00 AROW Leeds	10-Jul-2021 09:00 AROW Leeds
10-Jul-2021 09:10 AROW Leeds	
10-Jul-2021 09:20 AROW Leeds	10-Jul-2021 09:20 AROW Leeds
10-Jul-2021 09:30 AROW Leeds	10-Jul-2021 09:30 AROW Leeds

Appointment moved to clipboard

Linked appointments changes	
Before	After
10-Jul-2021 09:00 AROW Leeds	10-Jul-2021 09:00 AROW Leeds
10-Jul-2021 09:20 AROW Leeds	10-Jul-2021 09:20 AROW Leeds 
10-Jul-2021 09:30 AROW Leeds	10-Jul-2021 09:30 AROW Leeds

Appointment moved

Linked appointments changes	
Before	After
10-Jul-2021 09:30 AROW Leeds	
	10-Jul-2021 10:00 AROW Leeds