Appointments Setup Release 3.5
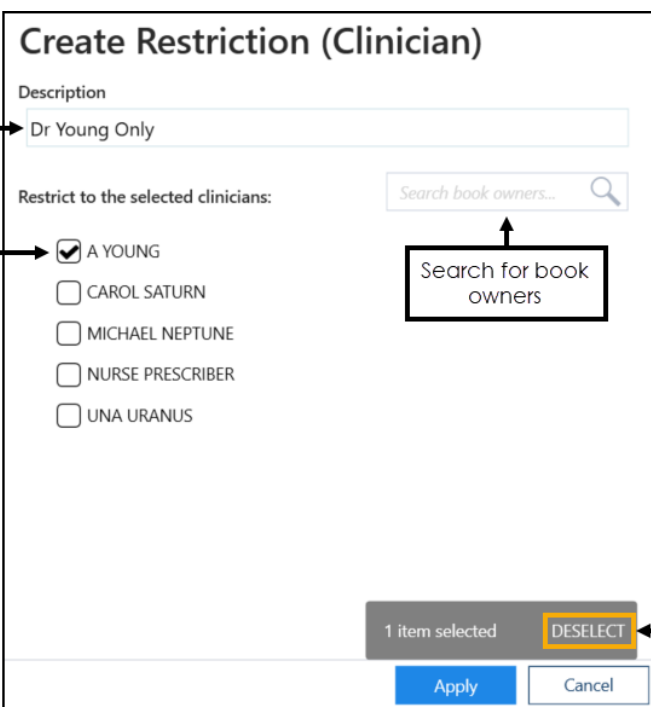
Summary of Changes

> ℹ️ **Important** - **Vision 3 users** - For full functionality you must be on a minimum of **Vision 3** release **DLM 860**, see [Checking your Current DLM Version](#) in the **Vision 3 Front screen Help Centre** for details.

Appointments Setup release **3.5** contains the following new features and improvements:

All Users

- **Slot Type Restrictions - Clinician** (This feature is dependent on **Vision 3** release **DLM 860**) - You can now create a slot type restriction that only allows specific clinicians to book appointments in those slots:
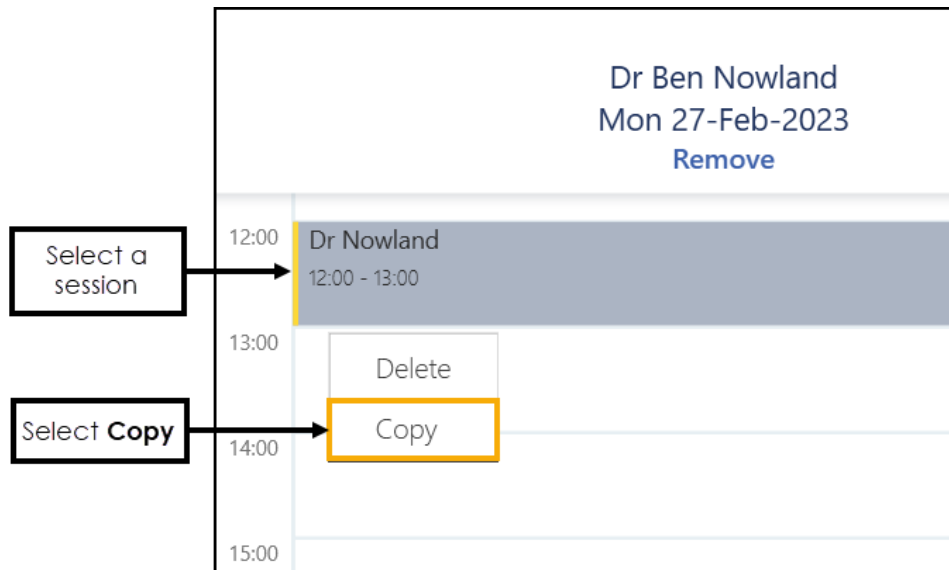
Create Restriction (Clinician)

Enter a description for the restriction →
Description
Dr Young Only

Restrict to the selected clinicians:
Search for book owners → *Search book owners...* 🔍

Tick to select the clinician(s) bookings can be made by →
- ☑ A YOUNG
- ☐ CAROL SATURN
- ☐ MICHAEL NEPTUNE
- ☐ NURSE PRESCRIBER
- ☐ UNA URANUS

1 item selected   DESELECT ← Deselect selected clinicians

Apply   Cancel

> ➡️ See **Slot Type Restrictions - Clinician** on page **5** for more details.
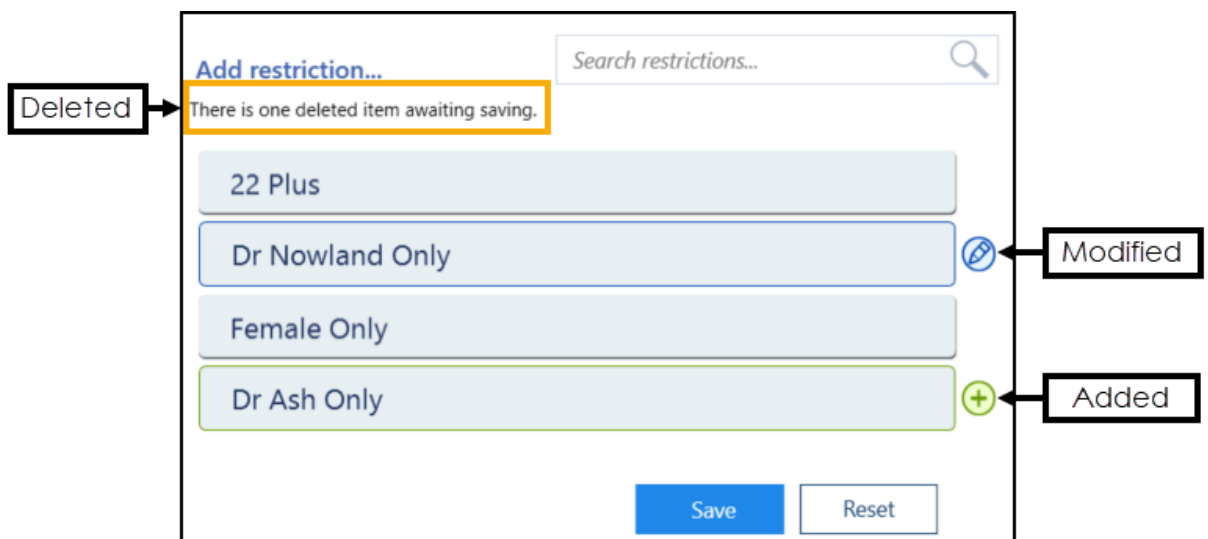
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Healthcare Solutions

- **Ad-Hoc Book Management - Copy sessions** - Sessions can now be copied from one day or book owner to another by selecting a session, selecting **Copy**, and then right click on a time in the book you want to copy to and select **Paste**:

Training Tip - You can paste a session multiple times after copying it.

- **Updating Appointments Setup** - When you add, edit, or delete in **Appointments Setup**, the number of deletions, or a symbol displays next to the affected row notifying you of the change, until you select to save or reset the changes:

Note - A warning notification displays ⚠ if the change cannot be made, for example, if the name is already in use.

- **Sessions** - A **Select All** option now displays on the **Sessions** screen. Tick **Select All** to select all the sessions in the list:

- **Test Patients** - Patients that have been added to **Vision 3** as a test patient now display with Test patient before their name:

England Only

- **Appointment Mode Mapping** - It is now mandatory when logging on to **Appointments Setup** to map all Slot Types to an **Appointment Mode** before carrying out any other action. If any Slot Types require mapping to an **Appointment Mode**, a message advises you of this and gives you the option to **Map now** or **Map later**:

> NHS England require all slot types to be mapped to an Appointments Mode for GPAD reporting.
>
> Please click on 'Map now' to go to the Modes page or 'Map later' to complete on your next log in.
>
> [Map now] [Map later]

- **Map now** - Displays the **Modes** screen, where you can filter the outstanding unmapped slot types and map them to an **Appointment Mode**.

- **Map later** - Allows you to defer on that occasion and continue using **Appointments Setup** without mapping.

  The next user to log on to **Appointments Setup** will only have the option to select **Map now**:

> NHS England require all slot types to be mapped to an Appointments Mode for GPAD reporting.
>
> You will need to complete this before carrying out any other activity in Appointments Setup.
>
> [Map now]

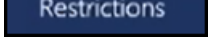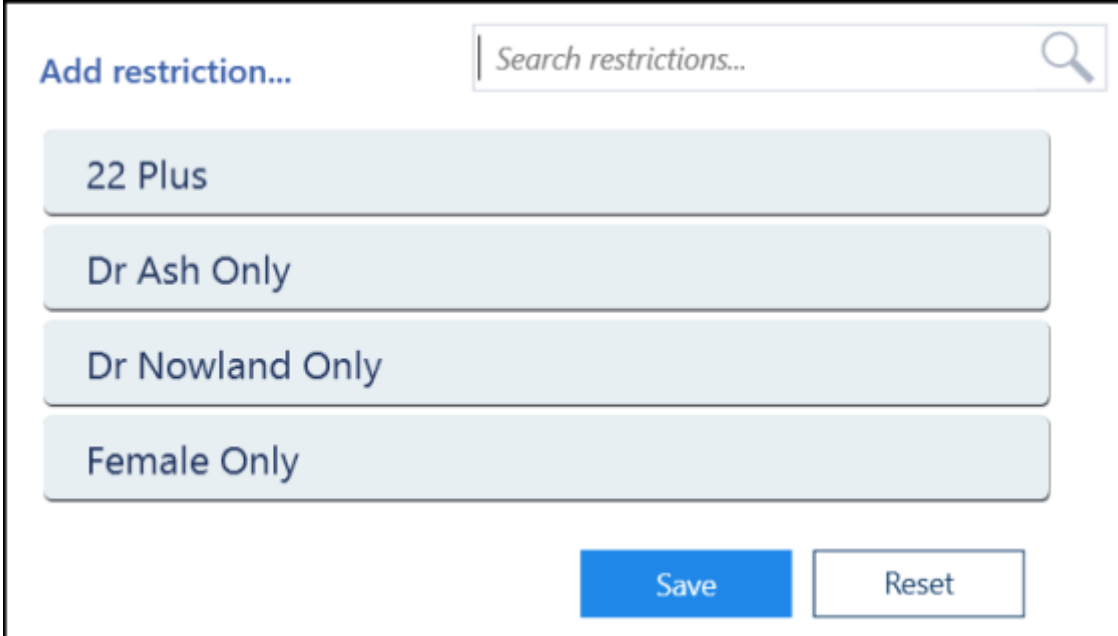**Important** - You cannot update **Appointments Setup** until **Appointment Mode** mapping is complete.

Slot Type Restrictions

You can add and maintain a list of **Slot Type Restrictions** to prevent bookings being made for patients in specific slots.

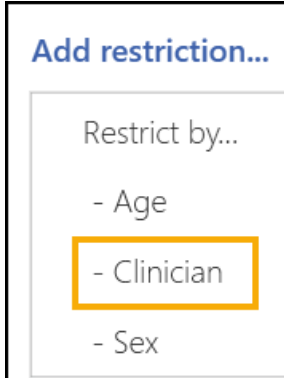## Slot Type Restrictions - Clinician

To add a **Slot Type Restriction** allowing bookings to be made by specific clinician(s) only:

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

    Add restriction...   Search restrictions...

    22 Plus

    Dr Ash Only

    Dr Nowland Only

    Female Only

    Save   Reset

2. Select **Add restriction** [Add restriction...], and then select **Clinician** from the list:

    Add restriction...

    Restrict by...

    - Age

    - Clinician

    - Sex

3. The **Create Restriction (Clinician)** screen displays. Complete the details of the restriction as required:

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

  Note - Duplicate Restriction descriptions are not allowed, and cannot be added. The '*This description is already in use*' message displays. Select **OK** and change the description.

- **Restrict to the selected clinicians** - Select the clinician(s) that are allowed to make bookings.

  Note - This prevents other clinicians booking appointments in slots that this restriction is applied to.

Training Tip - If the list of clinicians is too long to fit on your screen, you can search for one using **Search book owners**.