

# Appointments Setup Release 3.5

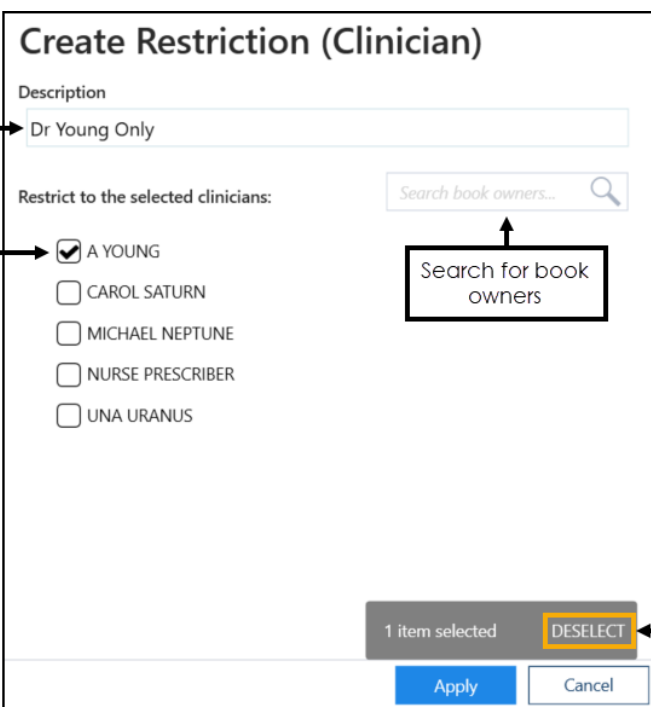
## Summary of Changes

**i 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:



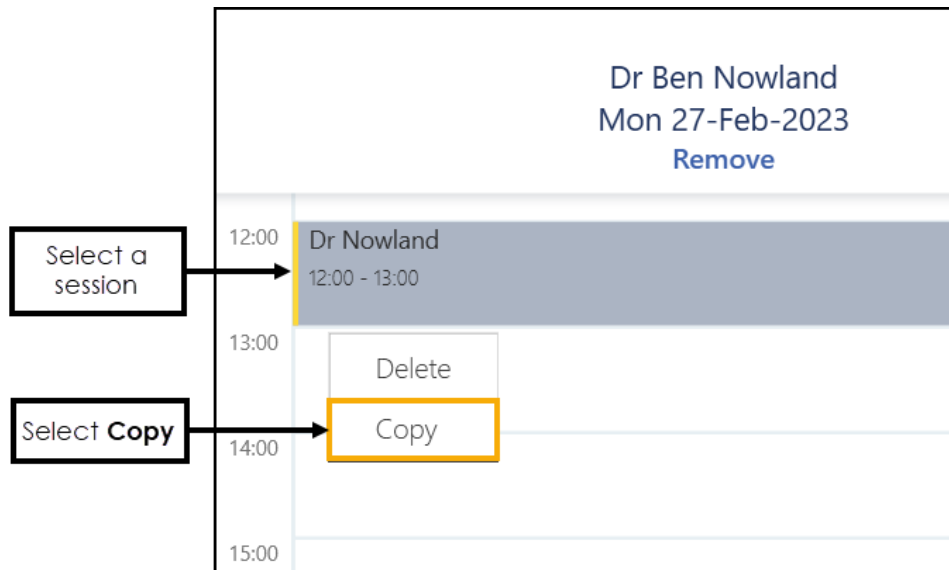
The screenshot shows the 'Create Restriction (Clinician)' form with the following elements and annotations:

- Description:** A text input field containing 'Dr Young Only'. An annotation box points to this field with the text 'Enter a description for the restriction'.
- Restrict to the selected clinicians:** A list of checkboxes with names:
  - A YOUNG
  - CAROL SATURN
  - MICHAEL NEPTUNE
  - NURSE PRESCRIBER
  - UNA URANUS
 An annotation box points to the 'A YOUNG' checkbox with the text 'Tick to select the clinician(s) bookings can be made by'.
- Search for book owners:** A search input field with a magnifying glass icon. An annotation box points to this field with the text 'Search for book owners'.
- Buttons:** At the bottom, there is a '1 item selected' indicator, a 'DESELECT' button (highlighted with a yellow box), an 'Apply' button, and a 'Cancel' button. An annotation box points to the 'DESELECT' button with the text 'Deselect selected clinicians'.

**➔** See [Slot Type Restrictions - Clinician](#) on page **5** for more details.

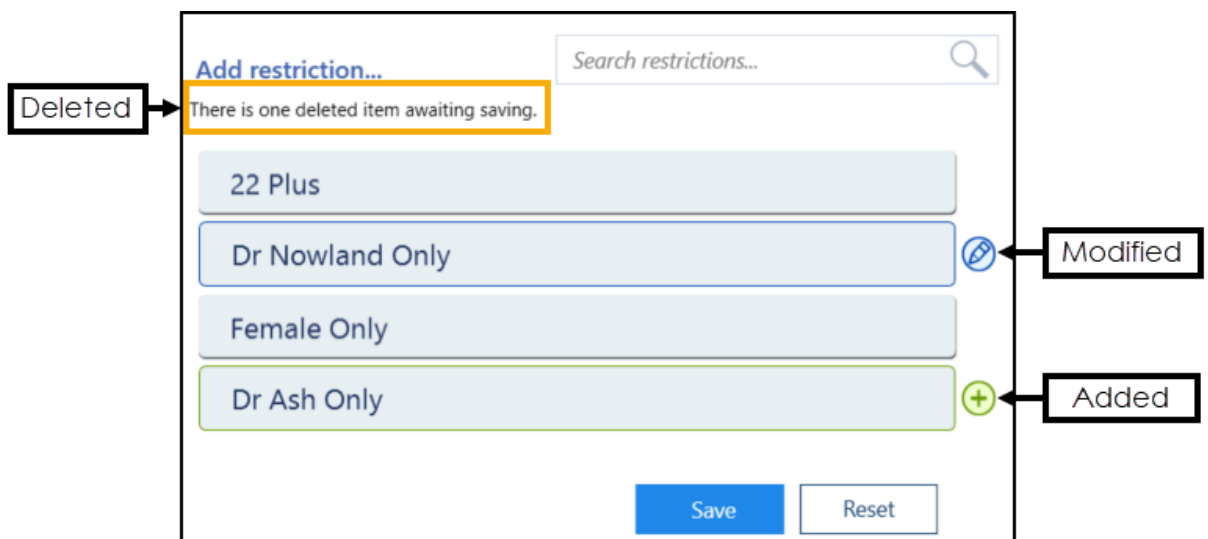



- **Ad-Hoc Book Management - Copy sessions** - Sessions can now be copied from one day or book owner to another by selecting a session, selecting **Copy**, and then right click on a time in the book you want to copy to and select **Paste**:



**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:

The screenshot shows the 'Sessions' screen. At the top left, there is a checkbox labeled 'Select all sessions' which is checked. Below it is a list of sessions, each with a checked checkbox on the left and a duration on the right. The sessions are: 'Afternoon Surg BA' (10m), 'Afternoon Surgery AR' (02h 00m), 'Afternoon Surgery BA' (02h 00m), 'Afternoon Surgery RH' (02h 00m), 'Dr Nowland' (01h 00m), 'Afternoon Surgery RL' (02h 00m), and 'Baby Clinic' (03h 00m). At the top of the list, there is an 'Add session...' button and three icons: 'Search weekly plans', 'Duplicate', and 'Delete'. A search bar labeled 'Search sessions...' is also present at the top right.

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

The screenshot shows a 'Linked appointment warnings' notification. The title is 'Linked appointment warnings'. Below the title is a yellow banner with a warning icon and the text: 'You have made changes to Linked Appointments for the following patients. You can review your changes here.' Below the banner is a table with one row of patient information:

Test patient MOUSE, Mickey... Leeds	01-Jan-1980 (43y) - 111 111 1111	
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Below the table are two icons: a link icon with the number '1' and a trash can icon.



## 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](#)

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

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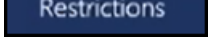


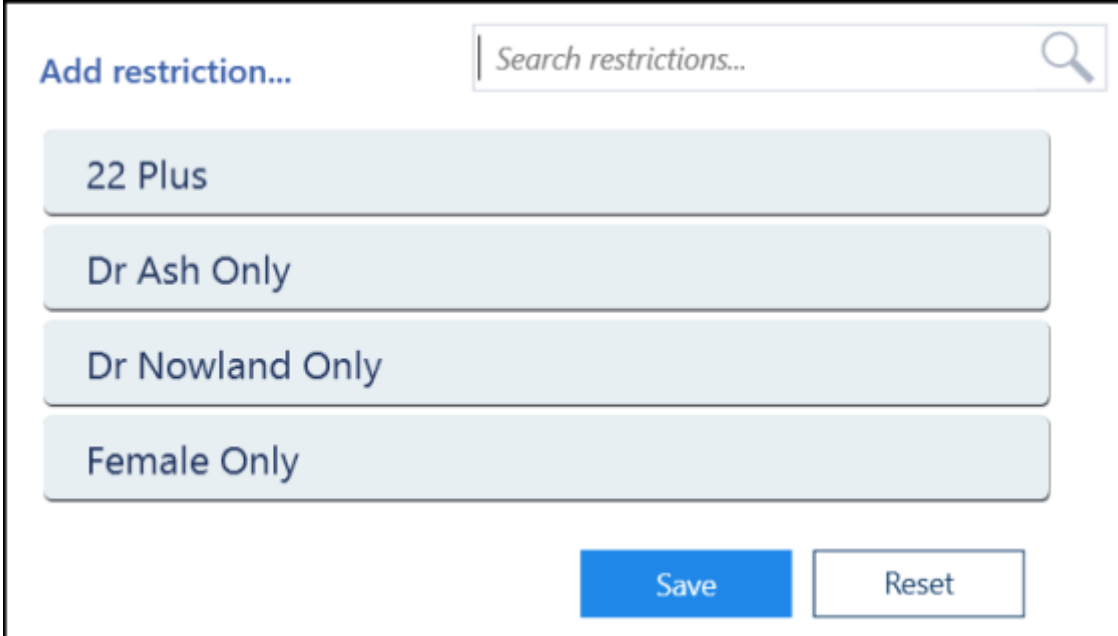
## Slot Type Restrictions

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

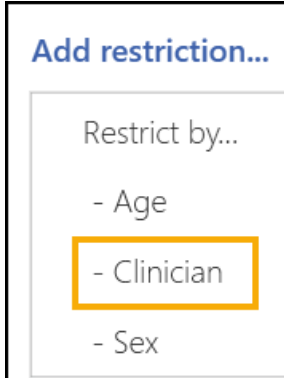
To add a **Slot Type Restriction** allowing bookings to be made by specific clinician(s) only:

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



The screenshot shows a window titled "Restrictions" with a search bar at the top right containing the text "Search restrictions...". Below the search bar is a list of four restriction items: "22 Plus", "Dr Ash Only", "Dr Nowland Only", and "Female Only". At the bottom of the window are two buttons: "Save" (blue) and "Reset" (white with a blue border).

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



The screenshot shows a dialog box titled "Add restriction...". Inside the dialog, there is a dropdown menu labeled "Restrict by...". The dropdown is open, showing three options: "- Age", "- Clinician" (which is highlighted with a yellow border), and "- Sex".



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

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

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 **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.

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

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

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The screenshot shows the 'Create Restriction (Clinician)' screen. It has a title bar at the top. Below the title, there is a 'Description' field containing 'Dr Young Only'. To the left of this field is a callout box that says 'Enter a description for the restriction'. Below the description field is a section titled 'Restrict to the selected clinicians:' which contains a list of checkboxes next to names: 'A YOUNG' (checked), 'CAROL SATURN', 'MICHAEL NEPTUNE', 'NURSE PRESCRIBER', and 'UNA URANUS'. To the left of this list is a callout box that says 'Tick to select the clinician(s) bookings can be made by'. To the right of the list is a search bar labeled 'Search book owners...' with a magnifying glass icon. Below the search bar is a callout box that says 'Search for book owners'. At the bottom of the screen, there is a status bar that says '1 item selected' and a 'DESELECT' button highlighted in yellow. To the right of this button is a callout box that says 'Deselect selected clinicians'. At the very bottom are 'Apply' and 'Cancel' buttons.

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

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