

Appointments Setup Desk Aid - Scotland



Appointments

The screenshot displays the 'Appointments Setup' interface for Dr. Ben Nowland. The interface includes a header with the doctor's name and a dropdown arrow. Below the header is a navigation bar with a date selector 'w/c 02-Jan-2023' and a right arrow. The main area is a grid of appointment slots for various templates (AROW, BOBA, MMAR, RLIN, RHAW) over a period from 02-Jan-2023 to 20-Feb-2023. Annotations include:

- Select a week:** Points to the date selector.
- View Linked Appointment Warnings:** Points to a warning icon in the top right.
- Open Appointments:** Points to a calendar icon in the top right.
- Filter:** Points to a funnel icon in the top right.
- Slot utilisation:** Points to a percentage icon in the top right.
- Refresh Locks:** Points to a refresh icon in the top right.
- Extend all displayed books:** Points to a right-pointing arrow icon in the top right.
- Hover for more information:** Points to a person icon in the left sidebar.
- Edit Live Appointment Books:** Points to a pencil icon in the top right.
- Right click options to manage a weekly plan:** Points to a context menu with options: 'Edit current template', 'Duplicate current template', 'Copy', 'Manage appointments', and 'View in Vision Appointments'.
- Planned weeks are grey until the books are extended:** Points to a greyed-out slot labeled '120 planned'.
- Active week:** Points to a highlighted slot.
- Blue stripe indicates owner's book is fully extended:** Points to a blue stripe on the left sidebar.

At the bottom right, there are 'Save' and 'Reset' buttons.



The following are commonly used options from the **Appointments Setup** toolbar. Select an option to:



Main menu - Display the **Appointments Setup menu**.



Refresh data - Update changes made by other users.



Linked Appointment Warnings - Indicates changes are made to linked appointments.



Edit Live Appointment Books - Manage the existing plans of a combination of book owners and dates.



Filter - Select and apply book owner filters.



Refresh Locks - Display any active locks.



Get counts - Show appointment slot usage, by owner, by week.



Extend all owners displayed - Extend all the books displayed.

Appointments Setup menu

From the  **Main menu** you can access all **Appointments Setup** functions:

- Booking methods
- Cancellation reasons
- Book owners
 - Staff
 - Clinics
- Extension plan
- Override reasons
- Owner extensions
- Restrictions
- Saved filters
- Slot types
 - Practice
 - Restrictions
- Session types
- Sessions
- Weekly plans

- **Booking methods** - Add to and maintain a list of **Booking methods** to audit how your appointment slots are being booked.
- **Cancellation reasons** - Add to and maintain a list of **Cancellation reasons** to audit why booked appointments are being cancelled. These are used by both practice and patients via online services.
- **Book owners - Staff and Clinics - Book owners** are the staff, usually clinicians and clinics, usually generic names, for example Asthma or Baby clinics, that appointment books are allocated to.
- **Extension plan** (Home screen) - Provides the tools to manage your appointment books.
- **Override reasons** - Add to and maintain a list of **Override reasons** to record why you are booking an appointment in a slot with a **Clinician** restriction, or a **Days/Hours Prior** restriction.
- **Owner extensions** - Allows you to allocate a default weekly template plan for each book owner and define the number of weeks that the books automatically extend by.
- **Restrictions** - Add to and maintain a list of **Slot type restrictions** to prevent bookings being made for patients in specific slots. Restrictions can be defined by clinician, age and sex, for example, you could map a female only **Slot type restriction** to slots in a maternity session, to prevent bookings being made for male patients accidentally in those slots.
- **Saved filters** - Add to and maintain a list of **Saved filters** to provide a quick way to view a selection of book owners and/or clinics.
- **Slot types** - Add to and maintain a list of **Slot types**. **Slot type** is the name allocated to the type of appointment that should be booked into this slot, for example an Emergency appointment could be booked into an appointment with a **Slot type** of Emergency only.
- **Session types** - Add to and maintain a list of **Session types** used to describe the purpose of an appointment session.
- **Sessions** - Add to and maintain a list of **Sessions**. A session is a period of time that contains appointment slots. You must create and allocate a session to a clinician or clinic before you can book an appointment.
- **Weekly plans** - Add to and maintain a list of **Weekly plans**. The weekly template plans for each book owner is used in the **Extension plan** view and becomes the released appointment books.