Vision Appointments Setup

Version 2.3

Thursday, May 14, 2020

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Getting Started

Accessing Vision Appointments Setup

Vision Appointments Setup is accessed from the main Vision 3 menu.

Select **Vision Appointments Setup** to launch.

Note - **Vision Appointments Setup** can be used by multiple staff and at the same time as Vision Appointments.

Navigating Vision Appointments Setup

On start up, Vision Appointments Setup displays your **Extension plan**, this provides an overview of the weekly plans and optionally, appointment utilisation details.

To access the rest of the Vision Appointments Setup features, select **Main Menu** from the top right corner of the screen to display the **Vision Appointments Setup menu**:
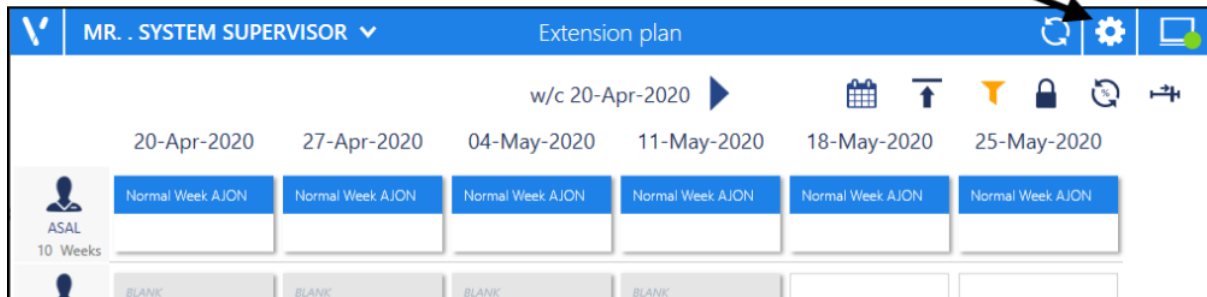
See Extension Plan Overview on page 21 and Slot Utilisation on page 32 for details.

If you update any aspect on a view and then navigate away from it without saving, a prompt displays asking you to **Save**, **Discard** or **Cancel**.
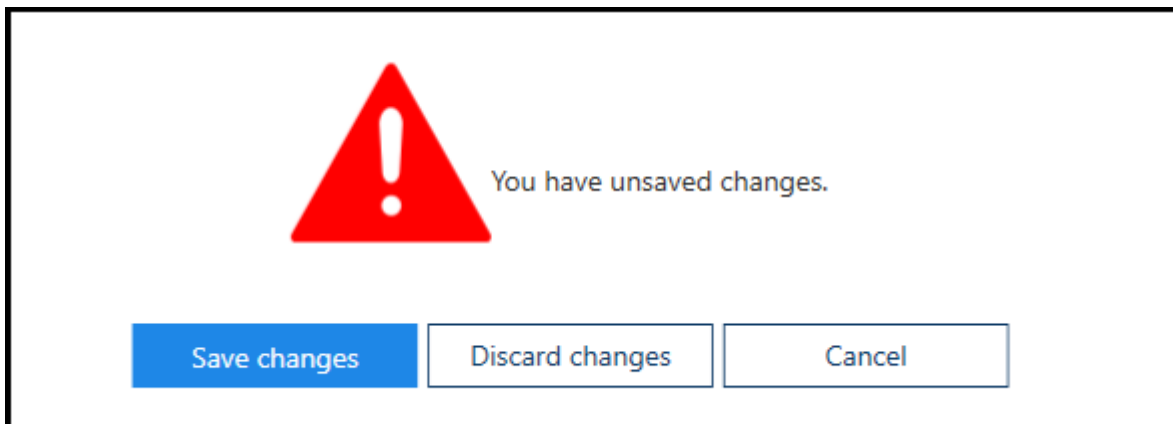
Vision Appointments Setup Menu

The **Vision Appointments Setup menu** is accessed from **Main Menu** ⚙ on the **Extension plan** screen, and provides access to all the Vision Appointments Setup functions:

From the menu you can access:

- **Cancellation Reasons**, see Cancellation Reasons on page 93.
- **Book Owners - Staff and Clinics**, see Book Owners - Overview on page 14.
- **Extension Plan** (Home screen), see Extension Plan Overview on page 21.
- **Owner Extensions** - default plan and number of weeks for extension, see Owner Extensions Overview on page 41.
- **Saved Filters**, see Add Filters on page 50.
- **Slot types**, see Slot Types Overview on page 57.
- **Session Types**, see Session Types on page 65.
- **Sessions**, see Sessions Overview on page 64.
- **Weekly Plans**, see Add Weekly Plans on page 82.

What do I need to use Vision 3 for?

The following functionality still needs to be carried out in Vision 3, and will be included in a later version of Vision Appointments Setup:

- **Reports**
- **Events**
- **Maintenance - System Constants**

See Vision Appointments Setup vs Vision 3 Appointments Feature Comparison on page 11 for details.

Vision Appointments Setup vs Vision 3 Appointments Feature Comparison

The following table compares Vision Appointments Setup to Vision 3 Appointments:

Function	Vision Appointments Setup	Vision 3 Equivalent
Cancellation Reasons See Cancellation Reasons on page 93	The top reason becomes the default.	Default can be added in System Constants.
Book Owners See Book Owners - Overview on page 14	Separate views for Staff and Clinic books for easier viewing.	Combined view of all book owners.
Extension Plan See Extension Plan Overview on page 21	View of all book owners with active books. Visual guide of how far in advance the books are extended. Indicator to show books are fully extended. Slot Utilisation percentages.	**Extend Books** Displays book owners and last date.
Owner Extensions See Owner Extensions Overview on page 41	All book owners shown, with plan details and default extension period.	**Time Planner (Books - Planner)** Shows individual book owner with plan
Saved Filters See Add Filters on page 50	Filtered views in the **Extension Plan**, for example all clinicians or nurses.	No equivalent functionality.
Slot Types See Slot Types Overview on page 57	List can be ordered. Frequently used section. Default slot type at the top of the list.	Alphabetical List. Default can be added in System Constants.
Session Types See Session Types on page 65	List can be ordered. Frequently used section.	Alphabetical List. Default can be added in System Constants.
Sessions See Sessions Overview on page 64	Can contain slot types of different lengths. Patterns can be copied. List can be ordered. Frequently used section.	All slots must be the same length. Slots manually allocated.

Weekly Plans	Visually time aligned.	Personal Plan.
See Add Weekly Plans on page 82	Sessions can edited or dragged to a different start time.	Default start time can be edited.

Refreshing Your View

As Vision Appointments Setup can be used by more than one person at a time, you should refresh your screen select at regular intervals to update the **Extension plan** with any changes made by other users.

To refresh your screen:

1. From the Extension plan screen, select **Refresh**
2. The system refreshes each of the views:

3. A message displays on completion:

Note - Users do not need to be out of the Appointments system while changes are made in Vision Appointments Setup.

See Extension Plan Overview on page 21 for details.

Book Owners - Overview

Book Owners are the staff, usually clinicians and clinics, usually generic names, for example Asthma or Baby clinics, that appointment books are allocated too.

From the **Vision Appointments Setup menu** you can:

- **Add new book owners**
- **Make book owners inactive**
- **Make book owners active**
- **Delete book owners**
- **Edit book owners**
- **Search book owners**

Adding a Book Owner - Staff

To add a member of staff as a Book Owner:

1. From the **Vision Appointments Setup menu**, select the **Book owners - Staff**.
2. The **Staff book owners** screen displays, select **Show inactive** at the top right to display inactive staff too.

   Note - The staff member must be set up in Vision 3 - File Maintenance - Staff before you can select them here.

3. Select **Add staff book owner**:
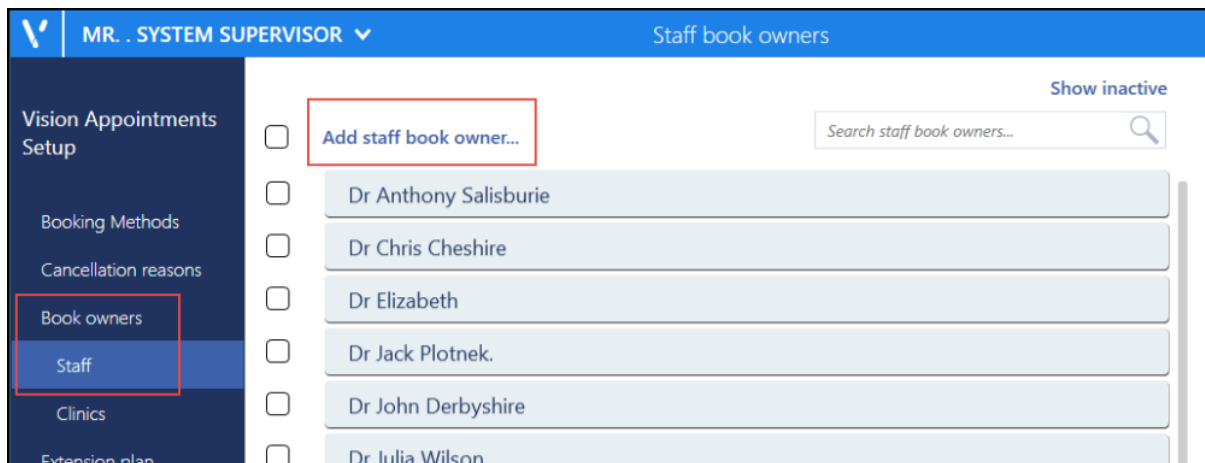
4. The staff list displays, using the scroll bar, run through the list and select the member of staff required, or use the **Search** bar to find them.
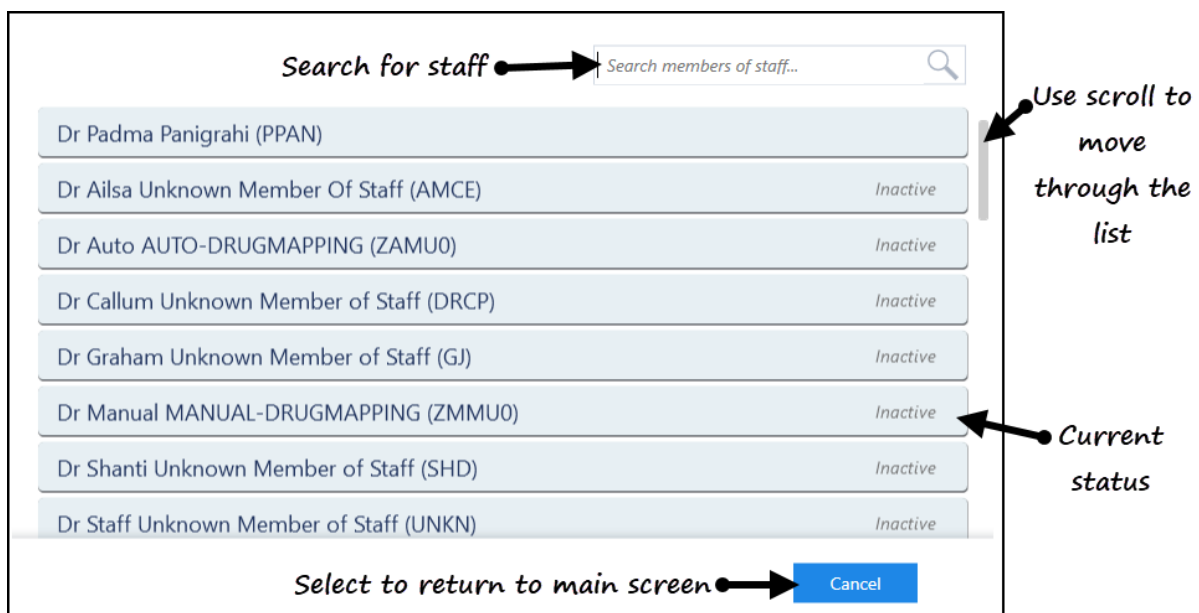
5. The **Staff book owners** screen displays with the new book owner listed.
6. Select **Save** to save your changes, **Reset** to cancel any changes or **Sort (A-Z)** to reorder the list.

Save   Reset

Note - If the staff member is inactive, this is indicated to the right of their name. Their status automatically updates to active on selection.
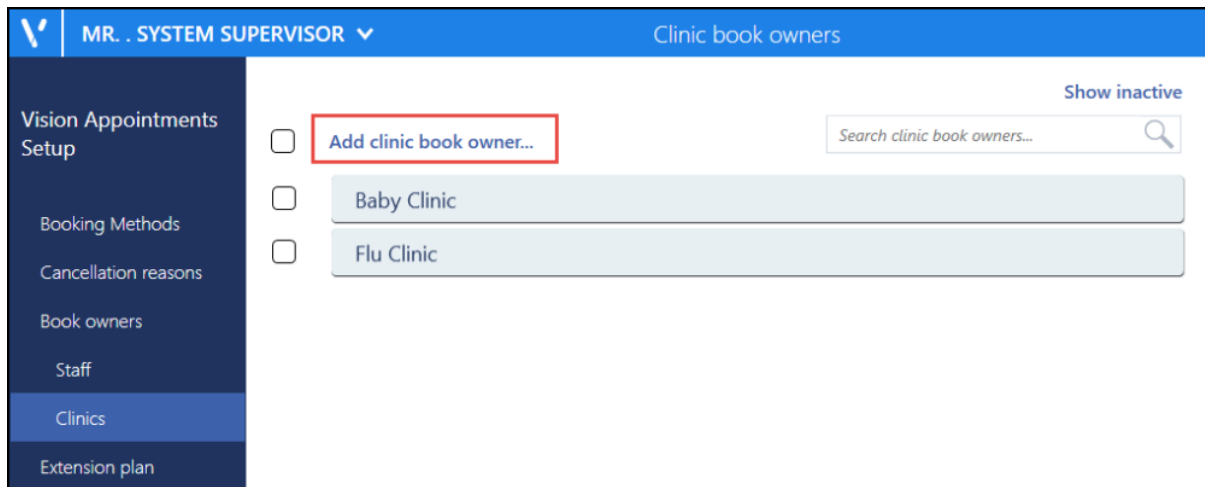
See Video Tutorials, Book Owners - Overview on page 14, Adding a Book Owner - Clinic on page 17 and Modify Book Owners on page 19.

Adding a Book Owner - Clinic
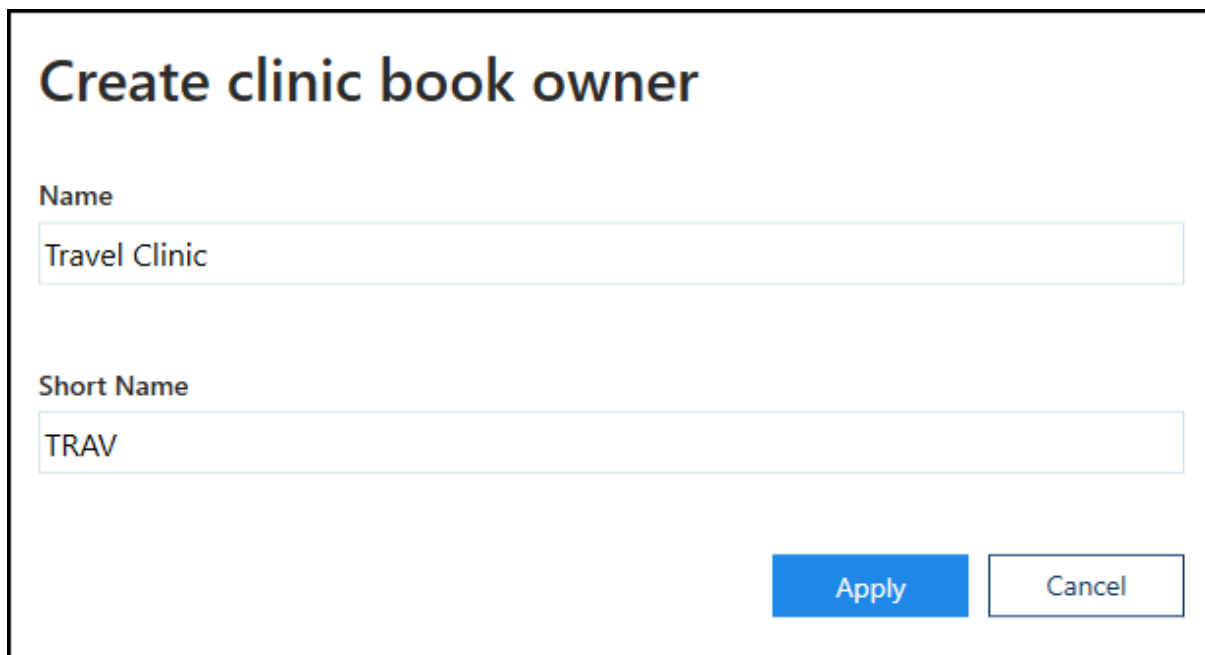
To create a clinic as a Book Owner:

1. From the **Vision Appointments Setup menu**, select the **Book owners - Clinics**.
2. The **Clinic book owners** screen displays, select **Show inactive** at the top right to display inactive clinics.
3. The **Clinic book owners** screen displays:

4. Select **Add clinic book owner** and the **Create clinic book owner** screen displays:

5. Complete as follows:
   - **Name** - Enter the clinic name
   - **Short Name** - Enter an abbreviated form of the clinic name, between 2 - 5 characters.

6. Select **Apply** and the **Clinic book owners** screen displays with new clinic included.
7. Select **Save** to save your changes, **Reset** to cancel any changes or **Sort (A-Z)** to reorder the list.

Save	Reset

See Book Owners - Overview on page 14, Adding a Book Owner - Staff on page 15 and Modify Book Owners on page 19 for details.

Modify Book Owners

You can make changes to the book owners as required including editing, deleting or changing status.

1. Select the **Staff** or **Clinics** view from the Appointments Setup Menu. See - Vision Appointments Setup Menu on page 9.

   To display inactive book owners or clinics, select the **Show inactive**

   Show inactive button at the top right of the view.

2. To edit or delete a book owner, select the name and amend, or click the **Delete**

   🗑 button to remove.

   > **Note** - Book owners that have had appointment books cannot be deleted, and can only be inactivated.

3. To make changes to the status, tick the box to the left of the staff or clinic name. A menu displays at the top of the screen.
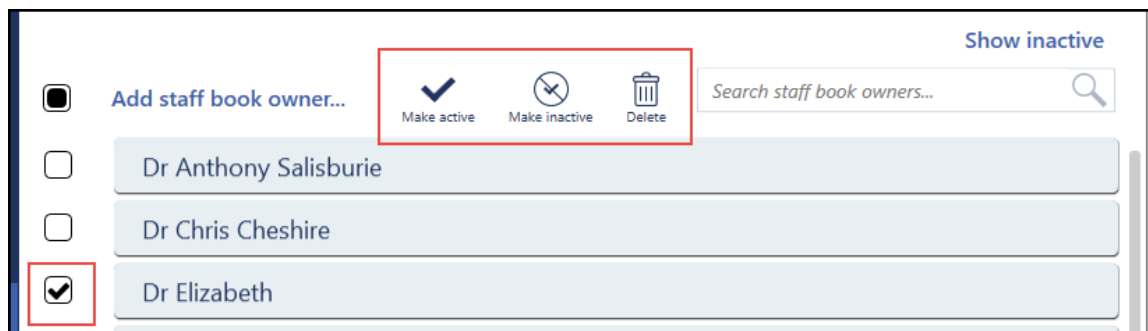
4. Select **Active** or **Inactive** to update the status accordingly, or delete.

   > **Note** - If the status changes to inactive, when the view refreshes *Inactive* displays to the right of the name, and the owner moves to the end of the list.

5. Select **Save** to save your changes, **Reset** to cancel any changes or **Sort (A-Z)** to reorder the list.

See - Video Tutorials, Book Owners - Overview on page 14, Adding a Book Owner - Staff on page 15 and Adding a Book Owner - Clinic on page 17.

Owner Extensions Overview

The **Owner Extensions** settings allocate a default weekly template plan for each book owner, and the number of weeks that the books are automatically extended by.

The view displays all active book owners by default.

The **Show Inactive** button includes inactivated book owners. These display at the end of this list, with *Inactive* to the right of their name, the previous extension period and default weekly template plan are maintained for reference.

Extension Plan Overview

The **Extension Plan** is the default view when you open Vision Appointments Setup and provides the tools to manage your appointment books:

- **View and Modify Planner**
  See - View Plans on page 36, Updating Weekly Planner on page 37 and Updating Plans on page 28.
- **Slot Utilisation**
  See - Slot Utilisation on page 32.
- **Extend Books**
  See - Extend Books on page 23, Extend Multiple Books on page 24 and Extend Single Book on page 26.
- **Undo Books**
  See - Undo Books on page 34.
- **Insert, Copy or Edit Templates**
  See - Updating Plans on page 28 and Edit Weekly Plans on page 84.
- **Apply Filters**
  See - Add Filters on page 50.
- **Refresh**
  See - Refreshing Your View on page 13.

The **Extension plan** view provides a snapshot of the appointment schedules, showing which weeks are active (blue), and how far in advance the books are extended.

The blue line to the left of the book owner indicates their books are fully extended.

Extension Plan view can also be accessed from the main Vision Appointments Setup menu:

See Vision Appointments Setup Menu on page 9, Extend Books on page 23, Extend Multiple Books on page 24, Extend Single Book on page 26, Undo Books on page 34, Slot Utilisation on page 32 and Updating Weekly Planner on page 37 for further details.

Extend Books

Extend Books generates appointment slots, for however far ahead appointments are available for booking, in each owner's appointment book. This maintains the length of appointment books.

The appointment book can extend from 1 to 80 weeks following the week you are in, a week starts on a Sunday, and each book owner has a defined number of weeks, see Owner Extensions Overview on page 41 for details.

You need to run **Extend Books** after doing the following:

- Initially after setting up weekly template plans for each owner, in order to release appointment slots on the **Session**, **Day** or **Calendar** views, see Add Weekly Plans on page 82.
- If an individual book length has been altered, see Owner Extensions Overview on page 41.
- Weekly task
  To release appointments.

Extending of books can also be undone. See - Undo Books on page 34.

See - Video Tutorials, Extend Single Book on page 26, Extend Multiple Books on page 24 and Undo Books on page 34.

Extend Multiple Books

The **Extension Plan** automatically filters the view to display active book owners with plans, these can all be extended together.

1. Open the **Extension plan** view. See -

2. Check the **Filter** to ensure the books you want to extend are all showing.
   If you don't want to extend all the books, hold down the CTRL key and left click on the specific owners to choose.

3. Select the **Extend books** button on the right of the view.
   Note - If all the books are up to date this button will be greyed out.

4. Check the **Confirm book extensions** alert, you may need to scroll to view all the statuses, for example, books already extended.
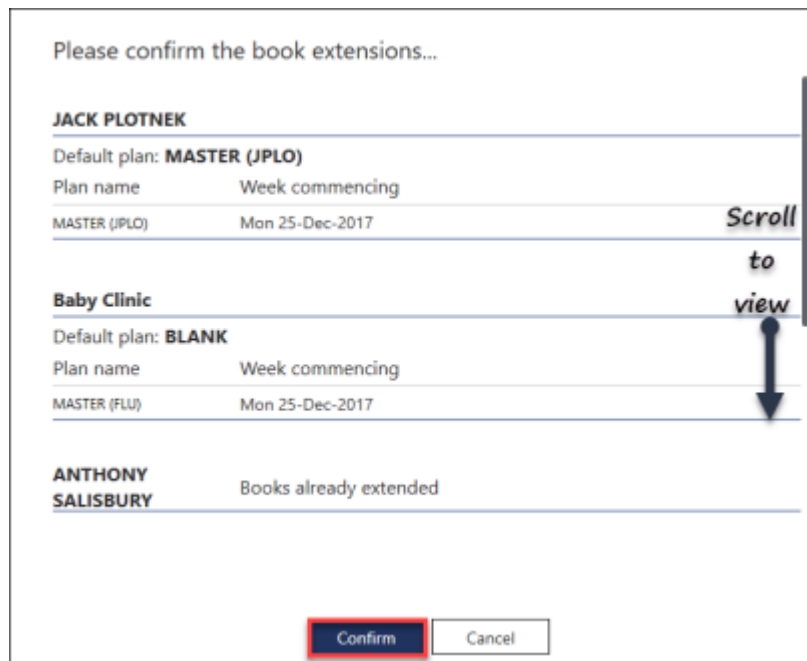
5. Select the **Confirm** button to continue.
6. As the books extend a progress indicator displays.

7. On completion a message displays confirming the books have successfully extended.
   Select the **OK** button, to clear the message.
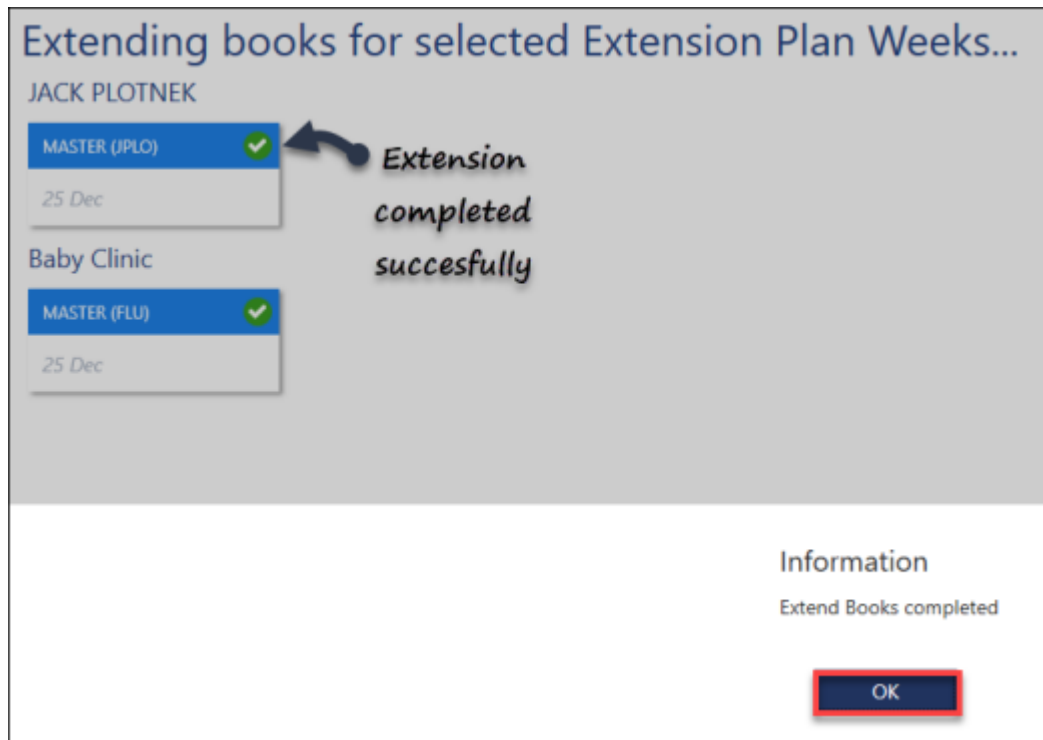
8. Select the **Close** button at the bottom right, to return to the **Extension Plan**.

See -

Extend Single Book

Appointment books can be extended on an individual basis.

1. Open the **Extension plan** view. See - Extension Plan Overview on page 21.
2. Right click on the **Book owner's name**, or an **inactive** (grey) week.
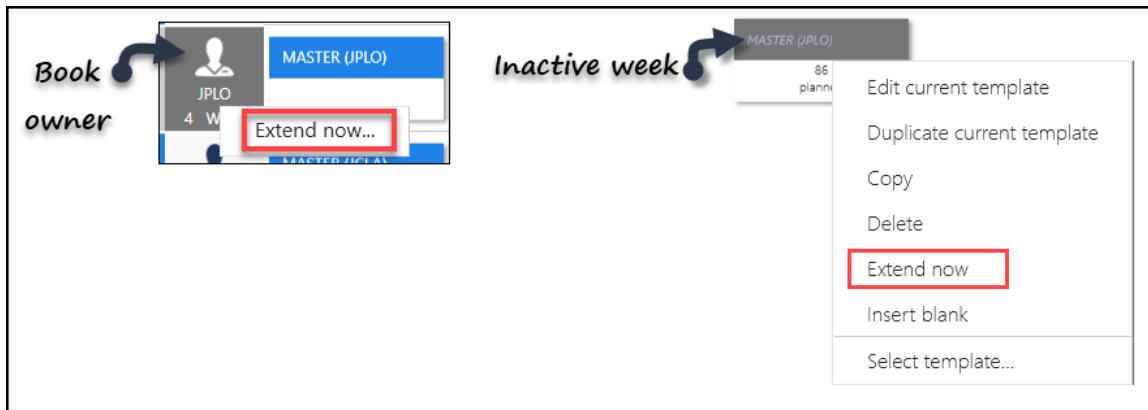
3. Select **Extend now**.
4. Check the **Confirm book extensions** alert.
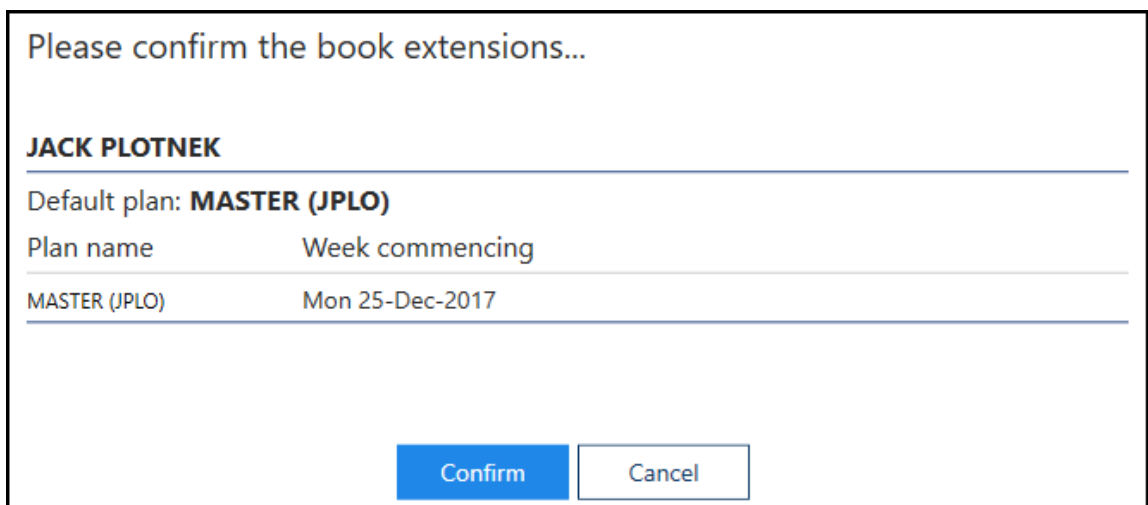
5. Select the **Confirm** button to continue.
6. As the book extends a progress indicator displays.
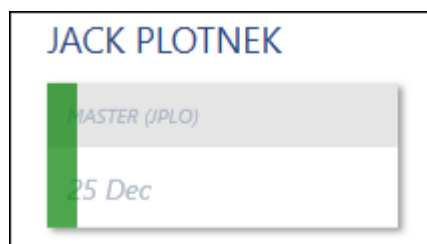
7. On completion, a message displays confirming the book has successfully extended. Select the **OK** button, to clear the message.
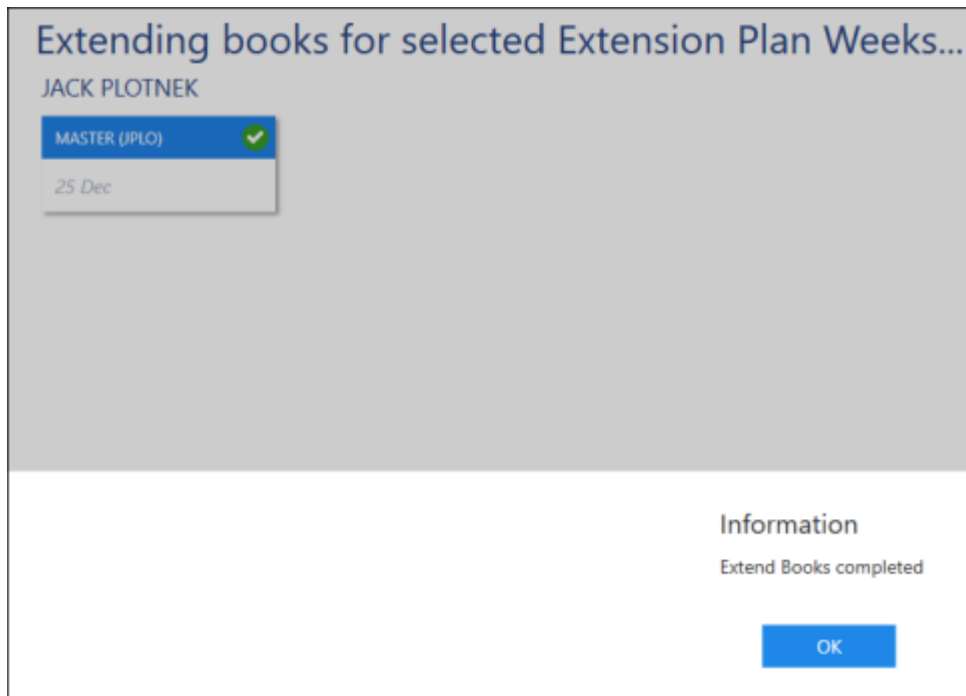
8. Select the **Close** button at the bottom right of the view, to return to the **Extension Plan**.

See - Extend Books on page 23 and Video Tutorials.

Updating Plans

The extension plan for a book owner can be updated using the right click menu:
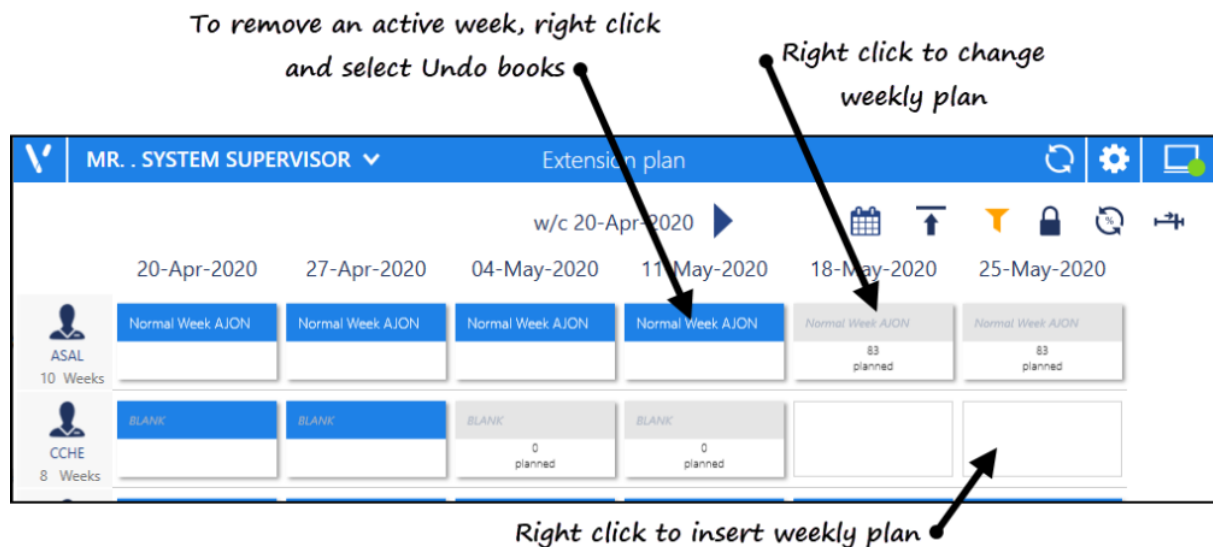
The options vary depending on whether the week is active, planned or blank.

Active Week (Blue)

The right click menu on an active week displays the following options:

- **Edit current template** - Select to change the current template. Changes are only applied to future active weeks, once the books are extended, see Edit Weekly Plans on page 84 for details.
- **Duplicate current template** - Select to create a new weekly plan from the current plan.
- **Copy** - Select to copy this weekly plan and paste it into any book owners planned or blank weeks.
- **Undo books** - Select to make the selected week(s) inactive and copy any booked appointments to the clipboard, see Undo Books on page 34 for details.
- **Manage appointments** - Select to access the **Ad-Hoc book Management** screen, see Ad-Hoc Book Management on page 96 for details.

Right click on an active week
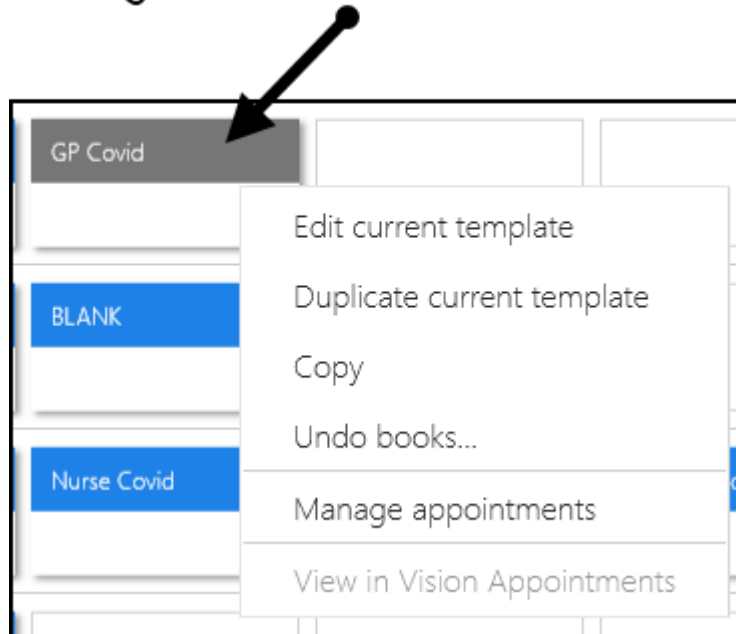
Planned Week (Grey)

The right click menu on a planned week displays the following options:

- **Edit current template** - Select to change the current template. Changes are only applied to future active weeks, once the books are extended, see Edit Weekly Plans on page 84 for details.
- **Duplicate current template** - Select to create a new weekly plan from the current plan.
- **Copy** - Select to copy this weekly plan and paste it into any book owners planned or blank weeks.
- **Delete** - Select to delete the planned week, the weekly template is unchanged.
- **Extend now** - Select to extend the selected plan only, see Extend Single Book on page 26 for details.
- **Insert blank** - Select to insert a blank week, one without any appointment sessions.
- **Select template** - Select to choose a weekly template to use.
- **Manage appointments** - Select to access the **Ad-Hoc book Management** screen, see Ad-Hoc Book Management on page 96 for details.

Right click on a planned week
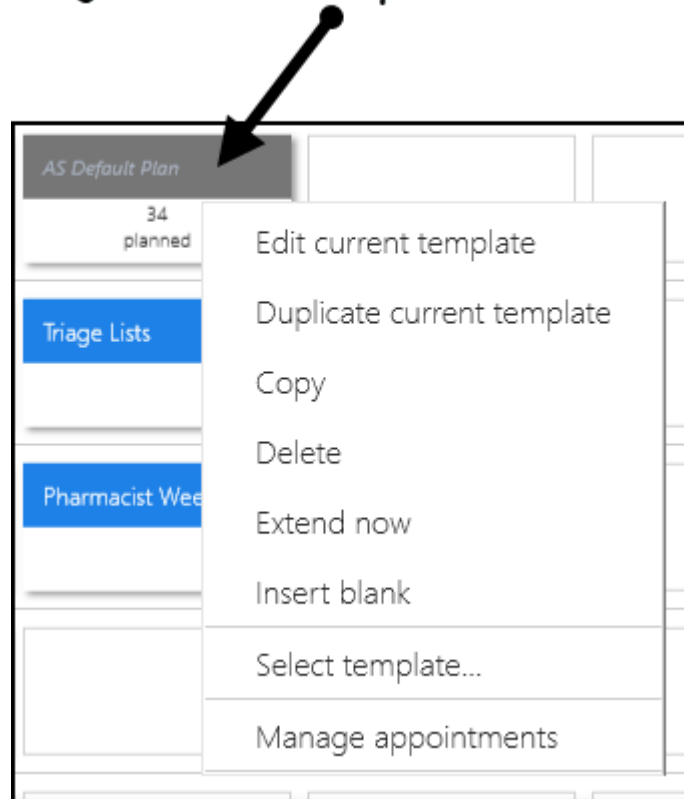
Blank Weeks

Right click on a blank week to display the following options:

- **Paste**(only active if you've copied a plan) - Select to paste a copied plan into the blank week.
- **Insert Blank** - Select to insert a blank week.
- **Select template** - Select to display all weekly plans to select from.
- **Manage appointments** - Select to access the **Ad-Hoc book Management** screen, see Ad-Hoc Book Management on page 96 for details.

Right click on blank week
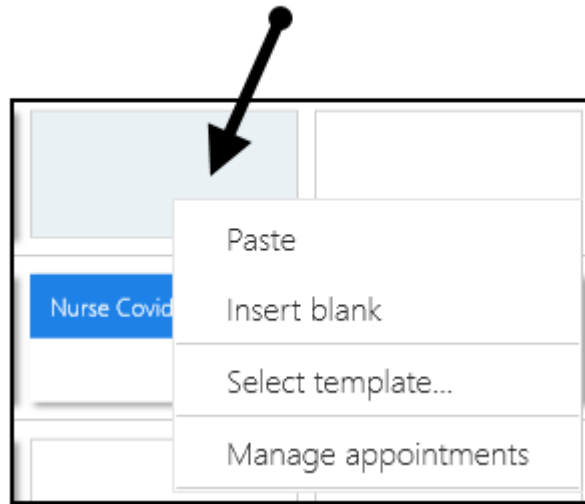
See View Plans on page 36, Updating Weekly Planner on page 37 and Extension Plan Overview on page 21 for details.

Slot Utilisation

The **Slot Utilisation** report shows at a glance, the appointment usage by book owner, by week.

1. From the **Extension Plan** view.

2. Select **Get counts** [icon].

3. The counts populate and display:
   - Free slots
   - Booked
   - Utilised %

   The utilisation is colour coded depending on the percentage.

   - **Red** - over 80% of slots booked
   - **Amber** - 61% to 80% slots booked
   - **Orange** - 41% to 60% slots booked
   - **Yellow** - 26% to 40% slots booked
   - **Green** - up to 25% or slots booked

MASTER (ASAL)		
42	168	80 %
free slots	booked	utilised

MASTER (JPLO)		
78	132	62 %
free slots	booked	utilised

MASTER (JCLA)		
110	100	47 %
free slots	booked	utilised

MASTER (PPAN)		
148	72	32 %
free slots	booked	utilised

MASTER (MHEA)		
285	45	13 %
free slots	booked	utilised

- Free slots
- Booked
- Utilised %

The utilisation is colour coded depending on the percentage.

- **Red** - over 80% of slots booked
- **Amber** - 61% to 80% slots booked
- **Orange** - 41% to 60% slots booked
- **Yellow** - 26% to 40% slots booked
- **Green** - up to 25% or slots booked

MASTER (ASAL)

42	168	80 %
free slots	booked	utilised

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MASTER (PPAN)

148	72	32 %
free slots	booked	utilised

MASTER (MHEA)

285	45	13 %
free slots	booked	utilised

4. To clear the counts, either:

- Select **Reset** Reset , or
- Navigate away from the view.

Note - All other reports are run via Vision 3.

See Extension Plan Overview on page 21 for details.

Undo Books

Once the books have been extended, these can be undone on an individual book owner basis.

1. Open the **Extension Plan** view.
   See Extension Plan Overview on page 21.
2. Right click on the active week(s) that you want to undo.
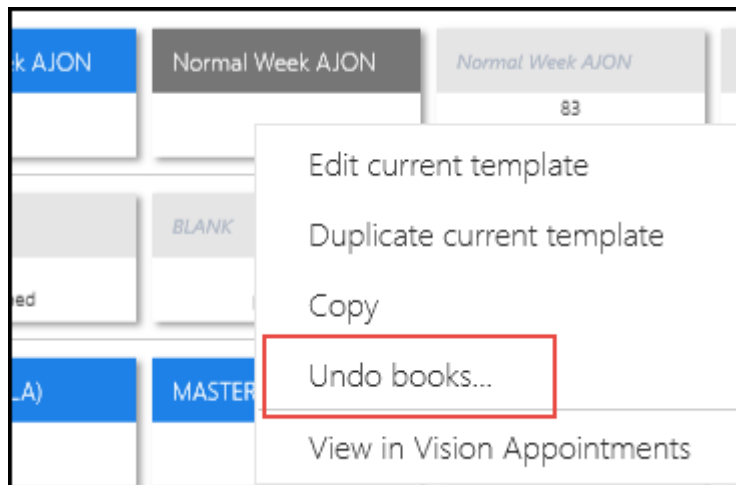
Note - Only the latest week(s) can be undone. You can select multiple weeks, for one book owner by holding the CTRL key.

3. Select **Undo books**.
   A warning displays.
4. Check the warning, and select the **Confirm** button to proceed.
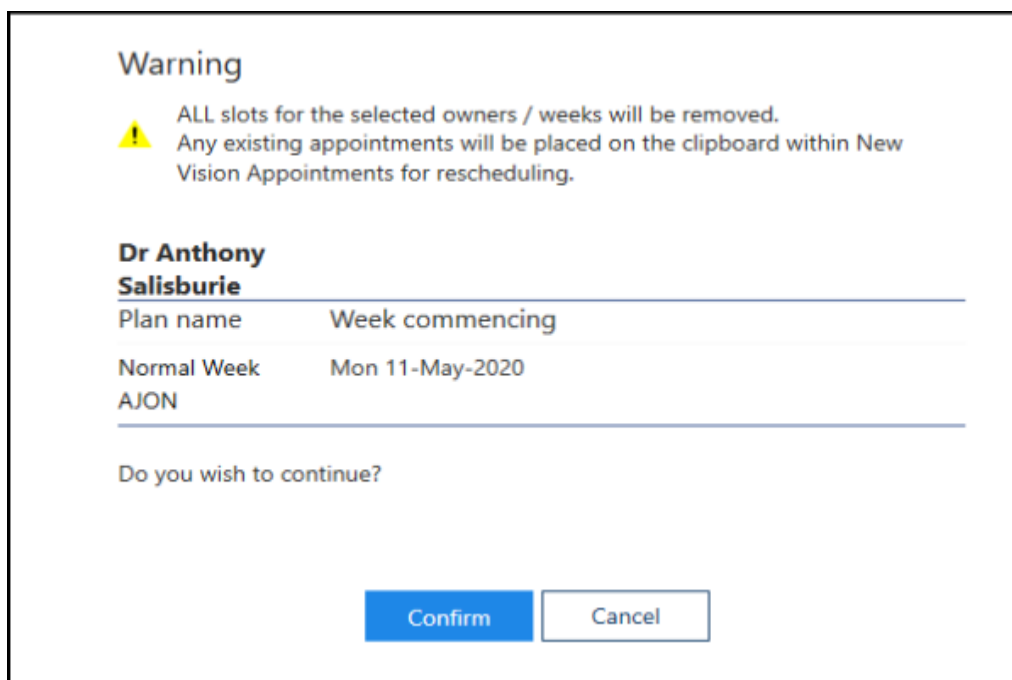
Note - Any existing appointments will be moved to the clipboard within **New Vision Appointments**.

5. As the books undo a progress indicator displays.
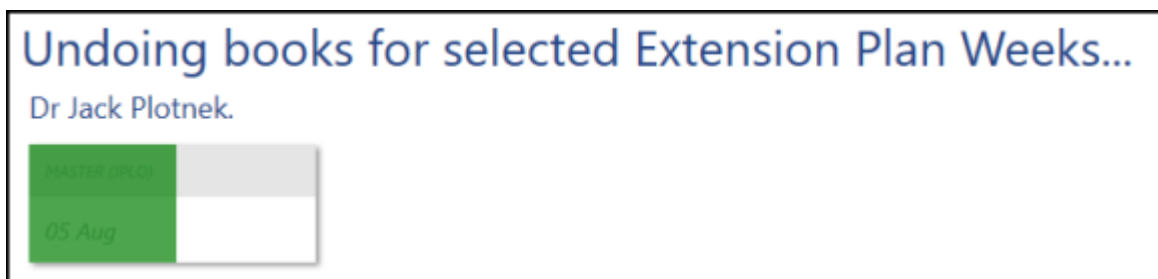
6. A message displays confirming undo books completed.
   Select the **OK** button, to clear the message and check any warnings.
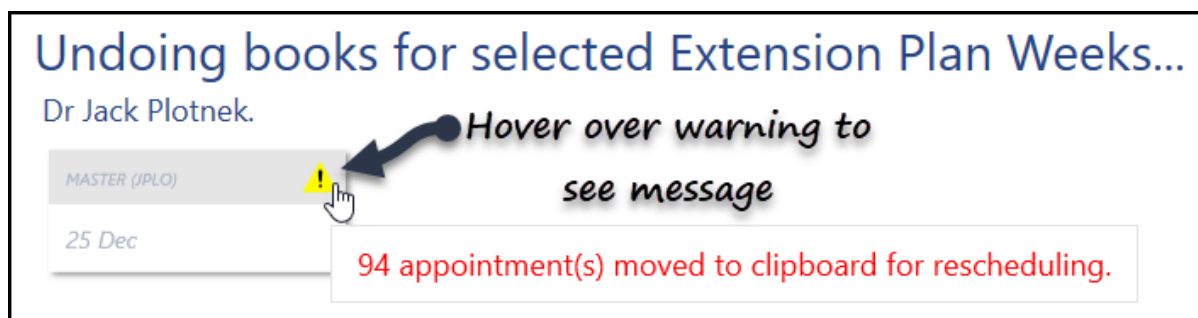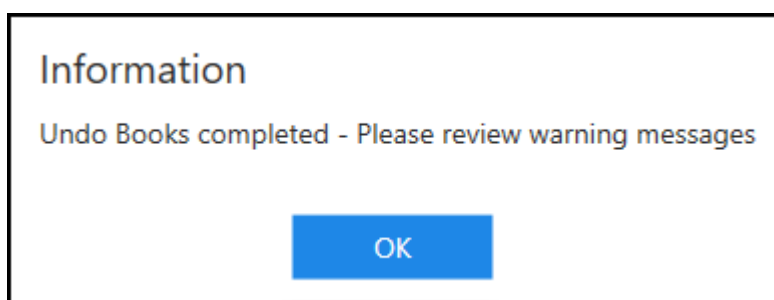
Note - Any booked appointments move to the clipboard, an alert also appears when you hover over the warning indicator.
These appointments will need to be manually rescheduled.

7. Select the **Close** button, at the bottom right of the screen, to return to the **Extension Plan** view.

See - Extend Books on page 23.

View Plans

The **Extension plan** shows each clinician and their active plan by week.
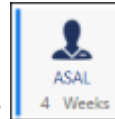
- The blue line to the left of the book owner indicates that their books are fully extended.
- Active plans display in blue, and indicate that the appointments for that week are released.
- Planned weeks display in grey and become active when the books extend.

Hover over the clinic / clinician to view details of their default plan and default extension. If the currently extended date is greater than the default extension date, this has been manually extended further.

See - Owner Extensions Overview on page 41.

Updating Weekly Planner

When books extend, the default weekly plan and specified number of weeks are used for each book owner. Within the **Extension Plan** you can also modify planned weeks using different plans, for example a week 2 plan.

1. Open the **Extension Plan** view.
   See - Extension Plan Overview on page 21.
2. The active weeks are shown in blue, along with the applied weekly template.

Note - Only inactive weeks can be changed. To inactivate a week use the Undo Books function.

See - Undo Books on page 34.

3. Right click on the inactive week that you wish to modify.
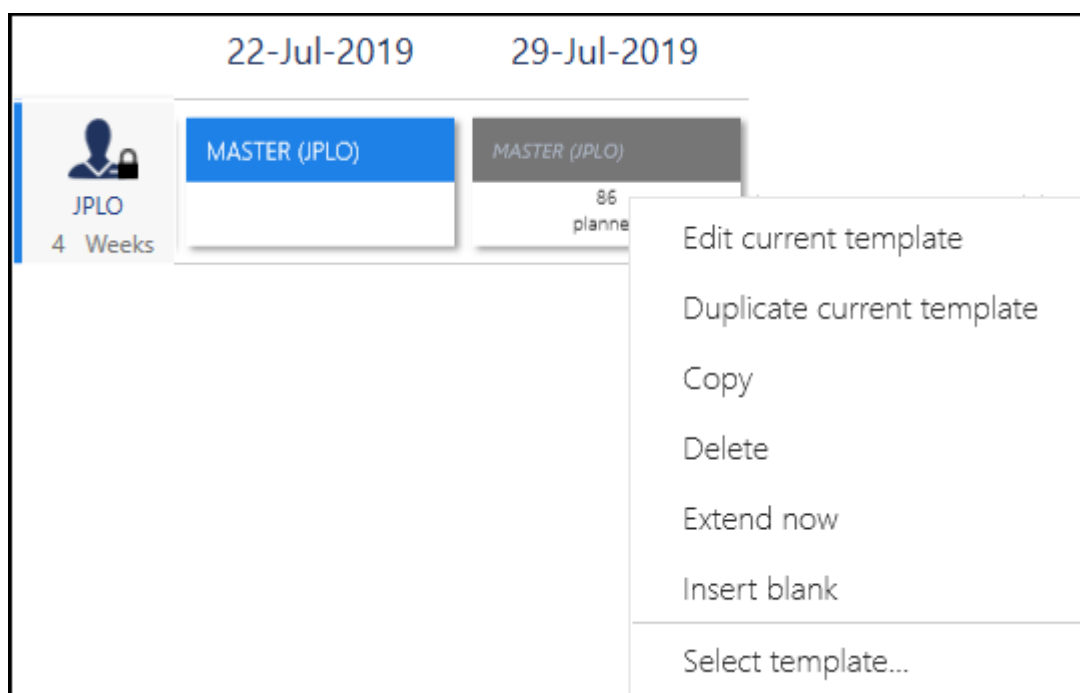
The menu displays the following options:

- **Edit current template**
  See - Edit Weekly Plans on page 84.
- **Duplicate current template**
  Copy the template and rename to modify. The new plan, can be used as a week 2 plan for example.

- **Copy**
  Copies the current template, then you can paste into a different users plan.
- **Delete**
  Deletes the template from the book owners planner. This doesn't delete the template.
- **Extend now**
  See - Extend Single Book on page 26.
- **Insert Blank**
  Inserts a blank template without any appointment sessions.
- **Select template**
  Displays all weekly plans for you to choose from.
- **Paste**
  This is only active when a template has been selected for copying.

4. Select the weekly plan you wish to use.
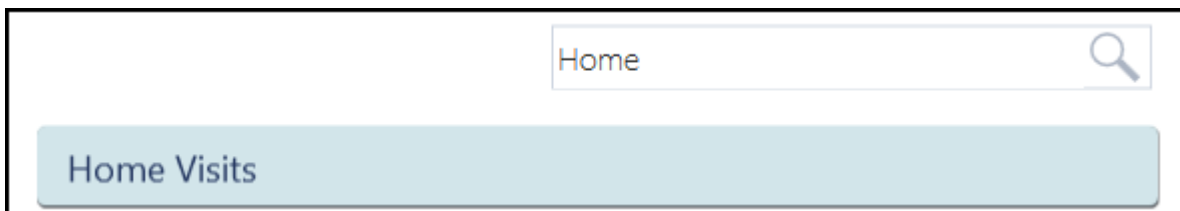
Alternatively, right click on a template you want to copy, select **copy**, and then **paste** into the book owners planner.
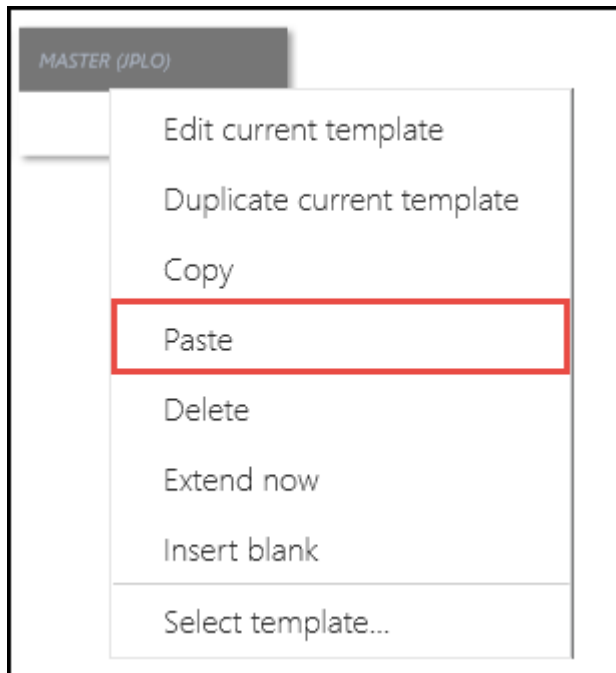
5. The view refreshes, and the planner now reflects the changes for that week.
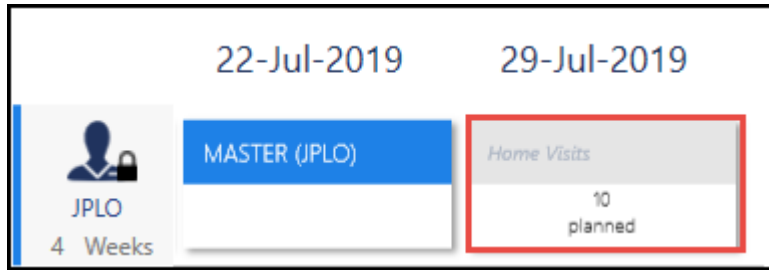
6. Repeat as required, and extend books. See - Extend Books on page 23.
7. Select the Save button at the bottom right of the screen to update the changes, or choose Reset to cancel any changes.

See - Updating Plans on page 28 and View Plans on page 36.

Owner Extensions Overview

The **Owner Extensions** settings allocate a default weekly template plan for each book owner, and the number of weeks that the books are automatically extended by.

The view displays all active book owners by default.

The **Show Inactive** button includes inactivated book owners. These display at the end of this list, with *Inactive* to the right of their name, the previous extension period and default weekly template plan are maintained for reference.

Owner Extensions Overview

The **Owner Extensions** settings allocate a default weekly template plan for each book owner, and the number of weeks that the books are automatically extended by.

The view displays all active book owners by default.

The **Show Inactive** button includes inactivated book owners. These display at the end of this list, with *Inactive* to the right of their name, the previous extension period and default weekly template plan are maintained for reference.

Owner Extensions Update

The default weekly extension plan for each book owner defines how far in advance the books are active, and the default plan.

1. Select **Owners Extensions** [Owner extensions] from the Appointments Setup Menu.
   See - Vision Appointments Setup Menu on page 9.
   The **Owner Extensions** view displays.

   > **Note** - Select the **Show Inactive** button at the top right to display inactive book owners. These show at the bottom of the list with *Inactive* to the right of their name.
   >
   > If you update the details for an inactive book owner, you will still need to activate them in the Book Owners section. See - Modify Book Owners on page 19.

2. Click the book owner's name to select.

   ANTHONY SALISBURY

   The **Edit** option activates.

3. Select the **Edit** button.
   The **Edit owner extension** popup activates.
4. To set the number of weeks you wish the books to extend, by enter a value in the **Weeks** box.

   Edit owner extension

   Owner Name:
   ANTHONY SALISBURY

   Update number of weeks

   Extend books by
   [4] Weeks

   Default plan for book extension
   MASTER (ASAL) [v]

   Select arrow to display plan pick list

   [Apply]   [Cancel]

5. Select the drop down arrow to display a pick list of plans.
6. Select a plan.

7. Select the **Apply** [Apply] button to update.
8. The **Owner Extensions** view reflects the changes.

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ANTHONY SALISBURY (ASAL)	3 weeks - Week 2 (ASAL)

9. Select **Save** to save your changes, **Reset** to cancel any changes or **Sort (A-Z)** to reorder the list.

Save	Reset

See - Owner Extensions Overview on page 41, Owner Extensions - Edit Extension Timescales on page 46 and Owner Extensions - Changing Plans on page 44.

Owner Extensions - Changing Plans

Update the default weekly template plan for a book owner.

1. Select **Owners Extensions** ![Owner extensions] from the Appointments Setup Menu.
   See - Vision Appointments Setup Menu on page 9.
   The **Owner Extensions** view displays.

Note - Select the **Show Inactive** button at the top right to display inactive book owners. These show at the bottom of the list with *Inactive* to the right of their name. If you update the details for an inactive book owner, you will still need to activate them in the Book Owners section. See - Modify Book Owners on page 19.
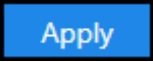
2. Tick the box next to book owner that you want to change the settings for. The **Change default plan** and **Change weeks** buttons activate
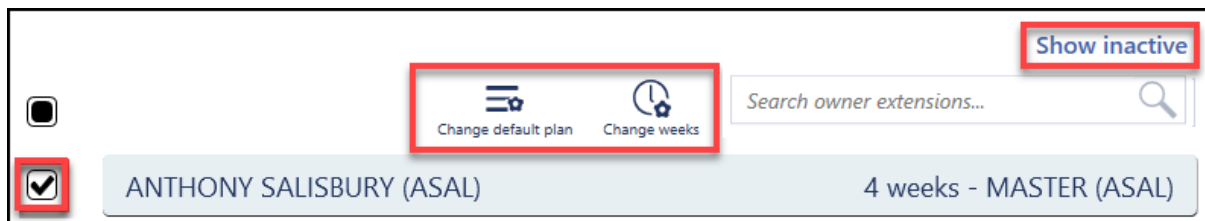
3. Select the **Change default plan** button.
   The **Edit Default Template** popup activates.
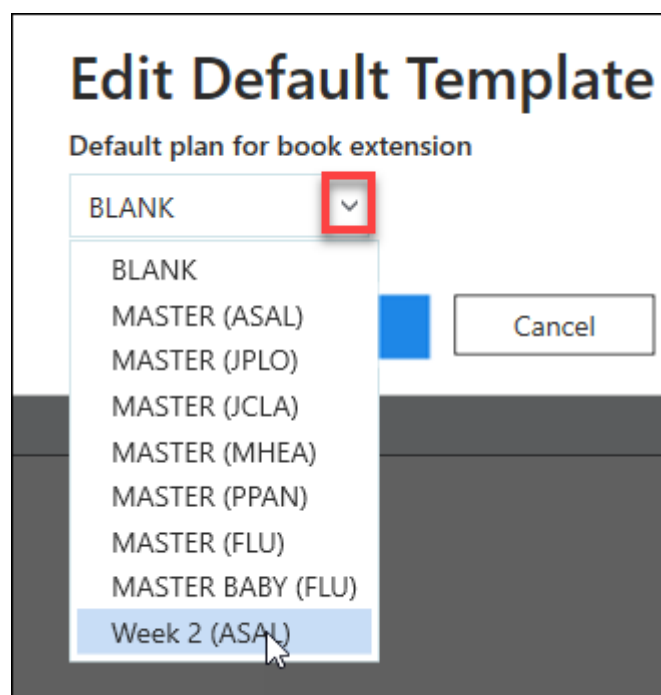
4. Select the drop down arrow to view the plans.
5. Choose the new default plan from the list.

6. Select the **Apply** Apply button to update.
7. The **Owner Extensions** view reflects the changes.
8. The **Owner Extensions** view reflects the changes.

ANTHONY SALISBURY (ASAL)	4 weeks - Week 2 (ASAL)

9. Select the Save button at the bottom right of the screen to update the changes, or choose Reset to cancel any changes.

Save   Reset

See - Owner Extensions Overview on page 41 and Owner Extensions - Edit Extension Timescales on page 46.

Owner Extensions - Edit Extension Timescales

Update the default weekly extension plan for a book owner, this defines how far in advance the books are active.

1. Select **Owners Extensions** from the Appointments Setup Menu.
   See - Vision Appointments Setup Menu on page 9.
   The **Owner Extensions** view displays.
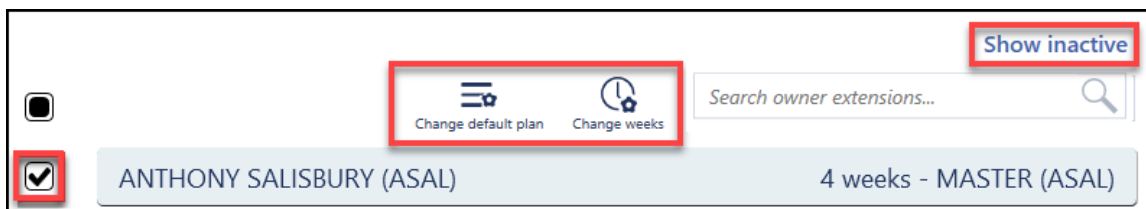
   > **Note** - Select the **Show Inactive** button at the top right to display inactive book owners. These show at the bottom of the list with *Inactive* to the right of their name.
   > If you update the details for an inactive book owner, you will still need to activate them in the Book Owners section. See - Modify Book Owners on page 19.
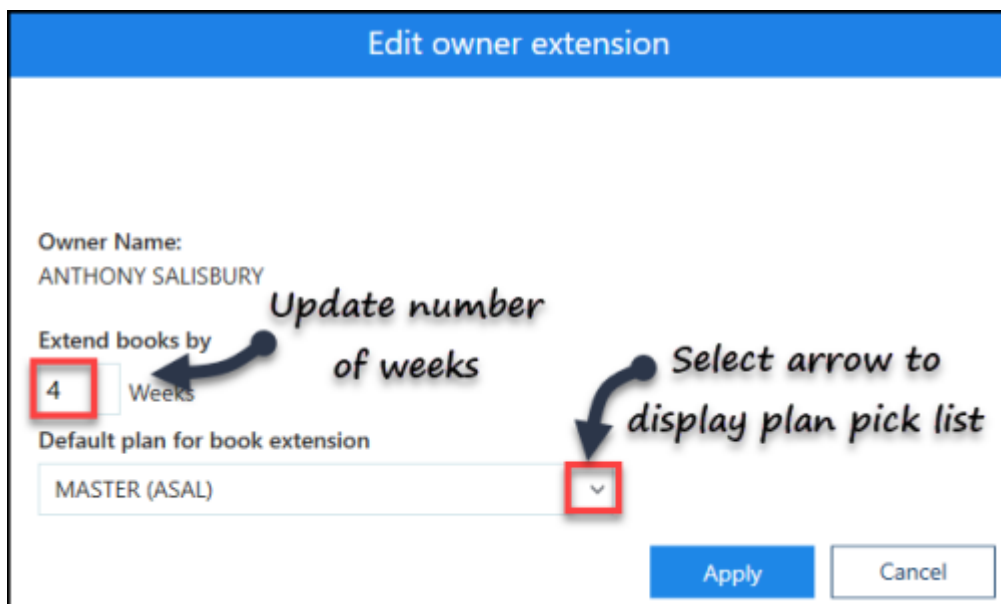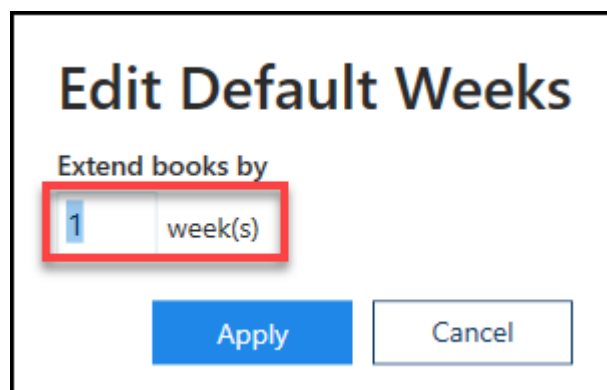
2. Tick the box next to the book owner(s) you want to change the settings for.

   The **Change default plan** and **Change weeks** buttons activate.

3. Select the **Change weeks** button.
   The **Edit Default Weeks** popup activates.
4. Enter a value in the **week(s)** box, to set the number of weeks you wish the books to extend by.

   > **Note** - This can be between 1 and 80 weeks.

5. Select the **Apply** button to update.
6. The **Owner Extensions** view reflects the changes.

7. Select **Save** to save your changes, **Reset** to cancel any changes or **Sort (A-Z)** to reorder the list.

See - Owner Extensions Overview on page 41 and Owner Extensions - Changing Plans on page 44.

Add Filters

Filters provide a quick way to view a selection of book owners, for example all GP's or all Nurses. The default filter displays book owners with active plans.

1. Select the **Saved filters** [Saved filters] option from the Appointments Setup Menu.
    See - Vision Appointments Setup Menu on page 9.
    The list of current filters displays.
2. Select **Add saved filter...** [Add saved filter...] from the top of the screen.
    The **Create Saved Filter** popup displays.
3. Enter a name for the filter.

4. If you wish the filter to be available to everyone, tick the **Practice wide filter** box.
5. Select the **Book Owners** that you want to be included.
    Choose **Show more clinics** or **clinicians** to see all book owners.

    Note - Inactive book owners display at the end of the list and have a line through the name.

6. Select the **Apply** [Apply] button to save.
    The view updates with the new filter.

7. Select **Save** to save your changes, **Reset** to cancel any changes or **Sort (A-Z)** to reorder the list.

See - Edit Filters on page 53.

Add Filters

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   See - Vision Appointments Setup Menu on page 9.
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6. Select the **Apply** [Apply] button to save.
   The view updates with the new filter.

7. Select **Save** to save your changes, **Reset** to cancel any changes or **Sort (A-Z)** to reorder the list.

See - Edit Filters on page 53.

Delete Filters

Filters provide a quick way to view a selection of book owners, for example all GP's or all Nurses.
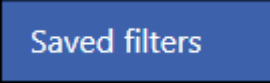
1. Select the **Saved filters** Saved filters option from the Vision Appointments Setup main menu.
   See - Vision Appointments Setup Menu on page 9.
   The list of current filters display.
2. Click the filter name to select.
   The **Edit** and **Delete** options activate.
3. Select the **Delete** button to remove.
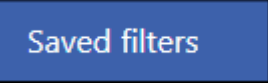4. Select **Save** to save your changes, **Reset** to cancel any changes or **Sort (A-Z)** to reorder the list.

See - Add Filters on page 50 and Edit Filters on page 53.

Edit Filters

Filters provide a quick way to view a selection of book owners, for example all GP's or all Nurses. These can be easily changed as required.

1. Select the **Saved filters** [Saved filters] option from the Vision Appointments Setup main menu.
   See - Vision Appointments Setup Menu on page 9.
   The list of current filters display.
2. Click the filter name to select.

   The **Edit** [✏] and **Delete** [🗑] options activate.

3. Select the **Edit** [✏] button to modify.

   The **Edit Saved Filter** popup displays.

4. Update the details as required. See - Add Filters on page 50.

5. Select the **Apply** [Apply] button to save the changes.
   The **Saved Filter** view displays.
6. Select **Save** to save your changes, **Reset** to cancel any changes or **Sort (A-Z)** to reorder the list.

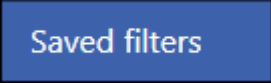See - Add Filters on page 50 and Delete Filters on page 52.

Slot Types Overview

The standard slot type is coloured white and defined as **Normal**, this is a default and does not need to be set up.

You can define other slot types, which can be inserted within a session of an appointment book. These slots are for particular reasons, for example:

- **Emergency**
- **Book on the Day**
- **Telephone Consultation**

These different slots can be defined in **Slot Types**, and each assigned a different colour to stand out on the appointments views. They are also searchable allowing you to quickly find specific appointments, for example emergency appointments.

The slot types can be dragged above the separator line, reordered and included in the frequently used slot types as required.

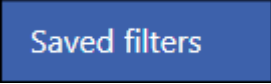Slots can be configured to display a warning message, for example *"Emergency appointments only"*, which prompts "*Do you wish to continue?* Click **Yes** to book or **No** to close".

The following options can also be used as required, when creating/editing slot types:

> **Note** - All slot types apart from 'Non-Viewable', when booked, send confirmation email/sms to patients registered for Patient Services - whether booked at the practice or online by the patient.

- **Non-bookable slots** – This slot type cannot be booked, if the slot is selected a warning message displays.
  For example, a catch up slot in a clinical session.
- **Non-Viewable Slot** - This slot type can only be viewed from Vision Appointments, Consultation Manager, Mail Manager, and some 3rd party applications, but do not

display in Online Services.

When booked at the practice, these slots do not generate confirmation emails/sms to patients registered for Patient Services.

- **Web Default** - Defining a slot as Web Default automatically allocates the slot(s) for use with Online Services. Each time the session is extended the slots are automatically created and marked Reserve for Web. These slots can also be booked as normal in the practice.

See - Adding a Slot Type on page 59 and Edit Slot Types on page 61.

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See - Adding a Slot Type on page 59 and Edit Slot Types on page 61.

Adding a Slot Type

To create a new appointment slot type, for example **Telephone Consultation**:

1. From **Vision Appointments Setup**, select **Slot types** [Slot types] from the **Vision Appointments Setup menu**.

2. The existing slot types display, select **Add slot type** [Add slot type...].
3. The **Create Slot Type** screen displays:

4. Complete as required:
   - **Name** - Enter a name for the slot for example *Telephone Consultation*
   - **Web booking** - Tick if you want this type of slot to be available for your patients to book online, as well as from within the practice
   - **Non-viewable** - Tick to only display this type of slot in the practice. No confirmation emails or SMS texts are generated for patients registered for online services from these appointments
   - **Short Name** - Enter a shot name for this slot type of between 2 and 5 characters
   - **Duration** - Set the default length of this slot type, this can be updated when an appointment is booked
   - **Delivery Channel** - Optional, for **GP Connect Appointments** only, from the available list, select how the appointment created from this slot type is to be delivered, for example, by telephone, in person, by video
   - **Available for booking** - Optional, select to define how far in advance an appointment created from this slot type can be booked
   - **Advisory Message** - Optional, enter a message to display on selection of appointments created from this slot type. If you have selected an **Available**

for booking other than **Immediately**, you can enter a warning message to display if the slot is accessed outside of the selected time period

- **Colour** - Select the black box and the **Slot Type Colour** screen displays:
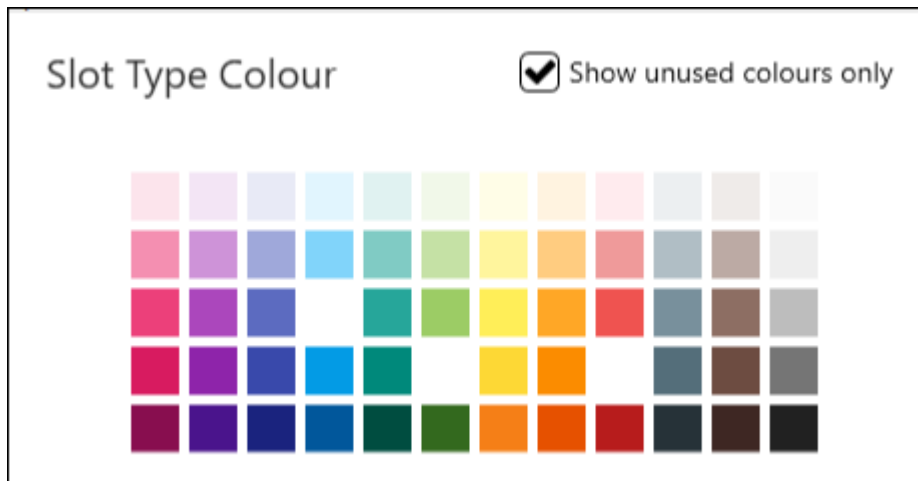
Select from the palette, optionally, tick **Show unused colours** , to avoid duplicating colours

5. Select **Apply** [Apply] to save the new slot type.
6. Optional, drag the new slot type to the position in the list you require.

> **Note** - The slot type at the top of the view is used as the default when creating sessions.

7. Select **Save** to save your changes, **Reset** to cancel any changes or **Sort (A-Z)** to reorder the list.

See for details.

Edit Slot Types

Changes can be made as required to the slot types.

1. Select the **Slot types** [Slot types] option from the Appointments Setup Menu.
   See - Vision Appointments Setup Menu on page 9.
   The slot types view displays.
2. Select the slot name.
   The **Edit** and **Delete** options display.

> **Note** - If you just want to edit the name, this can be done without using the edit button.

3. Select the **Edit** button to update.
   The **Edit Slot Type** screen displays.

4. Update the details as required. See - Adding a Slot Type on page 59.

5. Select the **Apply** [Apply] button to save the changes.
   The **Slot Type** view refreshes.
6. Select **Save** to save your changes, **Reset** to cancel any changes or **Sort (A-Z)** to reorder the list.

See - Adding a Slot Type on page 59 and Delete Slot Type on page 62.

61

Delete Slot Type

Slot types that are no longer needed can be deleted.

1. Select the **Slot types** option from the Appointments Setup Menu. See - Vision Appointments Setup Menu on page 9.
   The slot types view displays.
2. Select the slot name.

   The **Edit** and **Delete** options display.
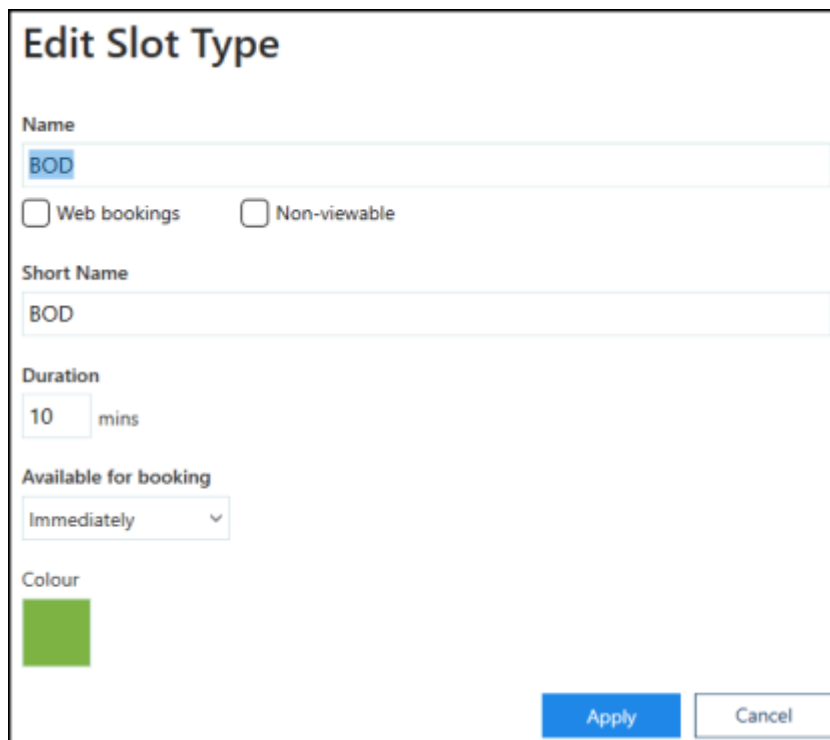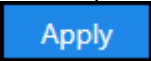3. Select the **Delete** button to remove.
4. Select **Save** to save your changes, **Reset** to cancel any changes or **Sort (A-Z)** to reorder the list.

See - Adding a Slot Type on page 59 and Edit Slot Types on page 61.

Sessions Overview

A session is a defined period of time - for example 120 minutes, and includes appointment slots which can be of different types and duration.

> For example:
>
> **Name**: Morning Surgery
>
> **Duration**: 120 minutes

Sessions can be used by any owner on any day and can start at any time.

If all your GPs use the same pattern for a surgery, i.e. always two hours with six appointments per hour, then you can use the same session for all the GPs, e.g. morning surgery, clinical.

Individual sessions should be re-used as often as possible throughout the system where their pattern is the same - this avoids the session list being too long. Unused or duplicated sessions should be deleted.

When a new session has been added, it is not associated with any particular day or book owner until it is linked to a weekly template plan.

Frequently used sessions can be dragged above the separator line.

Note - Sessions created in Vision Appointments Setup with different slot times must be inserted via the new Appointments app.

See - Video Tutorials, Creating a Session on page 67 and Edit Sessions on page 71.

Sessions Overview

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> For example:

Name: Morning Surgery

Duration: 120 minutes

Sessions can be used by any owner on any day and can start at any time.

If all your GPs use the same pattern for a surgery, i.e. always two hours with six appointments per hour, then you can use the same session for all the GPs, e.g. morning surgery, clinical.

Individual sessions should be re-used as often as possible throughout the system where their pattern is the same - this avoids the session list being too long. Unused or duplicated sessions should be deleted.

When a new session has been added, it is not associated with any particular day or book owner until it is linked to a weekly template plan.

Frequently used sessions can be dragged above the separator line.

Note - Sessions created in Vision Appointments Setup with different slot times must be inserted via the new Appointments app.

See - Video Tutorials, Creating a Session on page 67 and Edit Sessions on page 71.

Session Types

Before creating a new session, you need to define a list of session types. For example:

- **Morning Surgery**
- **Afternoon Surgery**
- **Evening Surgery**
- **Morning Visits**
- **Afternoon Visits**
- **Non-Clinical**

The exact setup of session types is down to the individual practice. Session types have the following characteristics:

- They are searchable, i.e. you can search for all morning visits.
- They are not time specific,
- They are separated into:
  clinical - with slots where patient names can be entered.
  non-clinical - without slots.

At this stage, no other details are assigned to a session type, ie no GP, time, appointment slots or days of week. These are defined when you set up the actual session.

To create a session type:

1. Select **Session types** from the Vision Appointments Setup menu.
   See - Vision Appointments Setup Menu on page 9.
   The **Session types** view displays.
2. Select **Add session type...** from the top of the view.
   The **Create Session Type** popup displays.
3. Enter the name for the new session.

This could be as simple as:

- **Clinical**
- **Non-clinical**

or more comprehensive:

- **Morning surgery**
- **Afternoon surgery**

- **Evening surgery**
- **Ante-natal clinic**
- **House Calls**
- **Practice Nurses**

4.   If appropriate tick the **Clinical box**.
     A clinical session type means that patients can be selected from the patient list and
     booked into this session, eg morning surgery.
     If left unchecked, then the session type is Non-clinical, for example - practice
     meeting or a trainee tutorial.

5.   Select the **Apply** [Apply] button to create the new Session type.
6.   The session type view displays, including the new session type.
7.   Optionally, drag the new session type into the frequently used session types,
     above the separator line.
8.   Select **Save** to save your changes, **Reset** to cancel any changes or **Sort (A-Z)** to
     reorder the list.

See - Sessions Overview on page 64.

Edit Session Type

To amend a description or clinical status

1.   Click the session type name.
     The **Edit** and **Delete** options display.

2.   Click the **Edit** [pencil icon] button.
3.   Make the amendment.
4.   Click **Apply**.
5.   Select **Save** to apply the changes.

Delete Session Type

1.   Click the session type name.
     The **Edit** and **Delete** options display.

2.   Click the **Delete** [trash icon] button.
3.   Select **Save** to apply the changes.
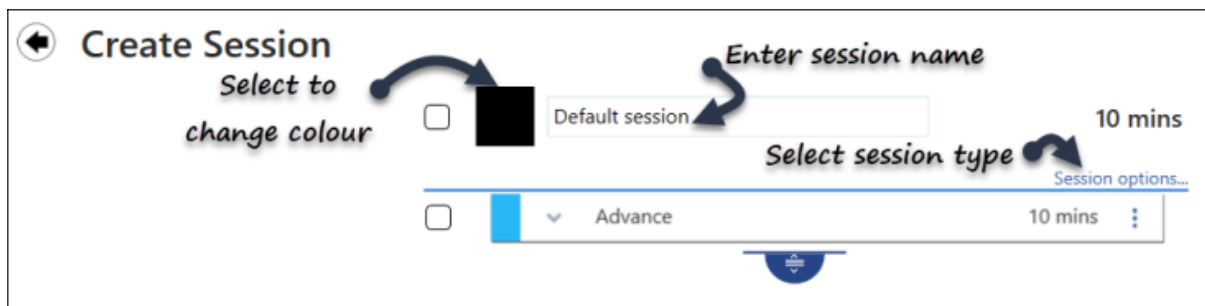
Creating a Session

A session contains all of your appointment slots and must be in place before you can book an appointment.

To create a Session:

1. From Vision Appointments Setup, select **Sessions** [Sessions] from the **Vision Appointments Setup menu**.

2. The existing sessions display, select **Add session** [Add session...].

3. The **Create Session** screen displays:

4. Complete as required:
   - **Select Colour** - Select the black square to choose a colour for the session header:

   Optionally, tick **Show unused colours only**, to avoid duplicating colours

   - **Default session** - Enter an appropriate session name, for example Dr Smith AM, Nurses PM surgery, Ante-Natal Clinic. This name displays when listing available sessions and on the **Reception** view so should be appropriate
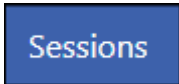   - **Session options** - Select from the following and then select **Save** to save and close:
     - **Session type** - Select as appropriate, see Session Types on page 65 for details
     - **Practitioner Role** - Mandatory for **GP Connect Appointments** only, tells the third party booking an appointment in this session the type of clinician they are booking. Select from the available list

- **Location** - Mandatory for **GP Connect Appointments** only, tells the third party booking an appointment in this session, where this appointment will take place, for example a branch surgery
- **Open session** - Tick to mark this session as an open session, for example a first come first served clinic
- **Travel clinic** - Tick to mark this session as a Travel clinic, especially useful for appointments booked online

- **Slot Type** - The default slot type is the first slot type on your **Slot types** screen, select the arrow to the left of the slot name, select **Select slot type**, and select the slot type required for the first slot. Select **Clear slot type** to inserts a blank non-bookable slot, are used as catch up slots.
    - If you are creating a session built mainly of the same slot, select the

    drag handle to extend the surgery, using the chosen slot type. The duration updates as you move the **drag handle**. You can now update any slot types required by selecting the down arrow, selecting **Select slot type** and choosing the slot type required, you can also change more than one slot type at once, see Change Multiple Slot Types on page 75 for details.
    - If you are creating a pattern of slots, for example, two normal, one telephone, one book on the day repeated, extend the session to four slots, select the slot combination and then extend the session using

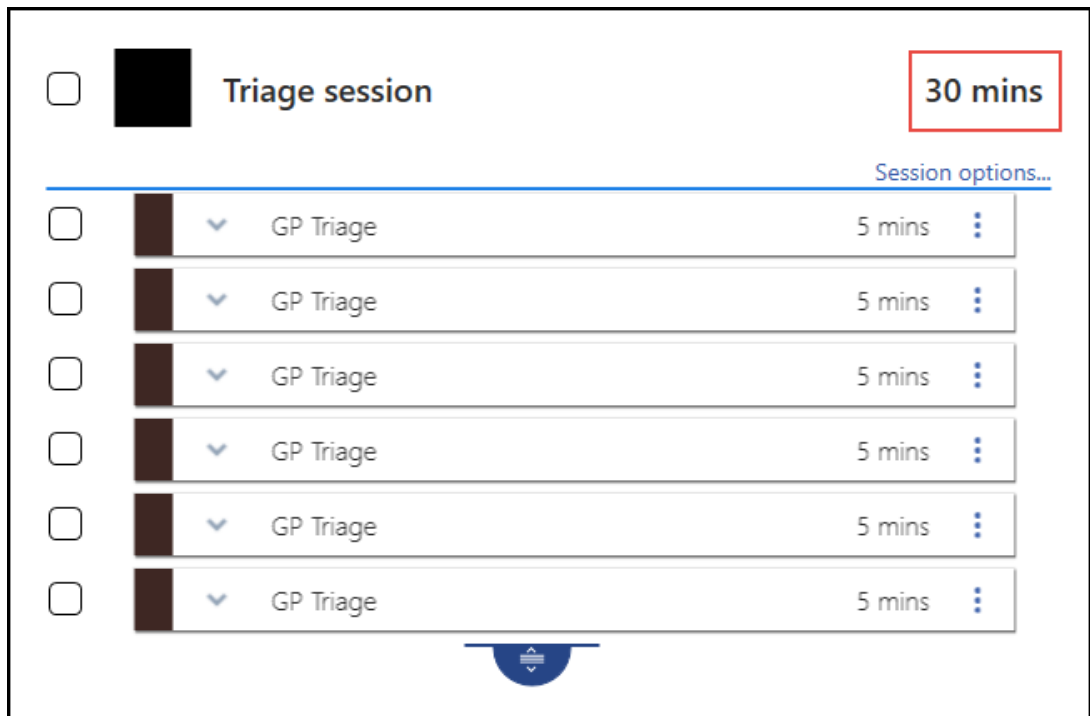   the **drag handle** . The pattern you created is repeated as the session is extended, see Slot Patterns on page 78 for details

        Note - You can always make changes to the slot types once the session is created.
- **Duration** - You can specify a duration in minutes or just move the **drag handle** to the correct time frame

- Select **Options** on any slot to:
  - **Copy** - Copies a slot
  - **Paste** - Pastes a copied slot
  - **Delete** - Deletes the slot
  - **Insert before** - Adds a slot before this one
  - **Insert after** - Adds a slot after this one
  - **Set as temporary default slot** - Select this to select this type of slat as your default for this session only
  - **Set as 'Available for web'** - Marks this slot as available for online booking
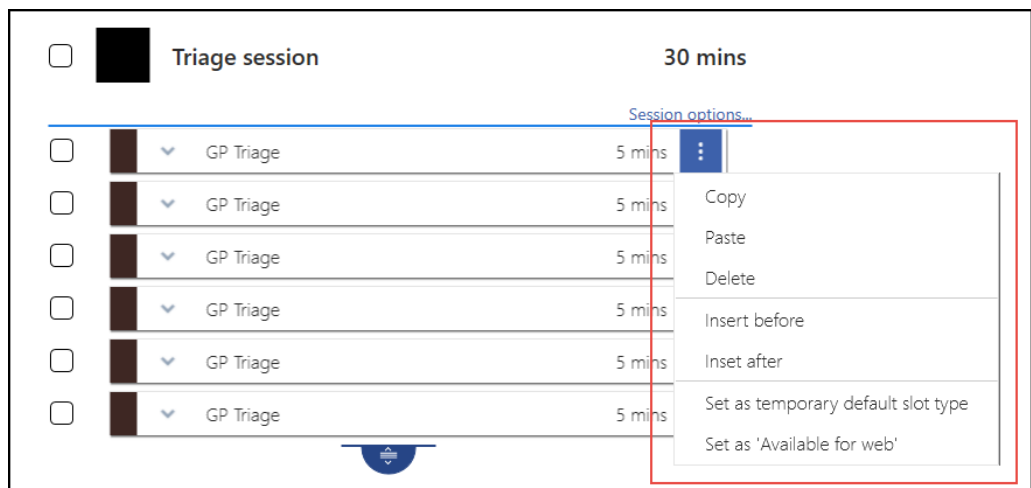
5. Select **Save** to save your changes, **Reset** to cancel any changes or **Sort (A-Z)** to reorder the list.

See Video Tutorials and Sessions Overview on page 64 for details.

Edit Sessions

Existing sessions can be updated as required. Any changes will apply to new weeks when the books are extended, any currently active weeks are not changed unless the undo books utility is used and the books extended.

1. Select **Sessions** | Sessions | from the Appointments Setup Menu.
   See - Vision Appointments Setup Menu on page 9.
   The **Session** view displays.
2. Select the **Session** you want to update.

   The **Edit** | ✏ | and **Delete** | 🗑 | options display.
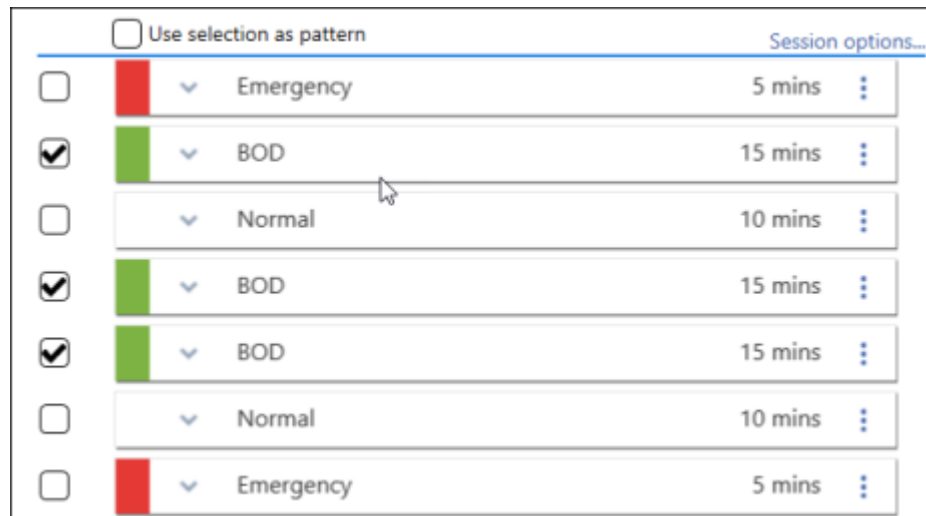
3. Click the **Edit** | ✏ | button to make changes.

   The **Edit Session** view displays.

4. The session can now be edited.

   You can select multiple slots and amend their type using the **Change** | Change | button.
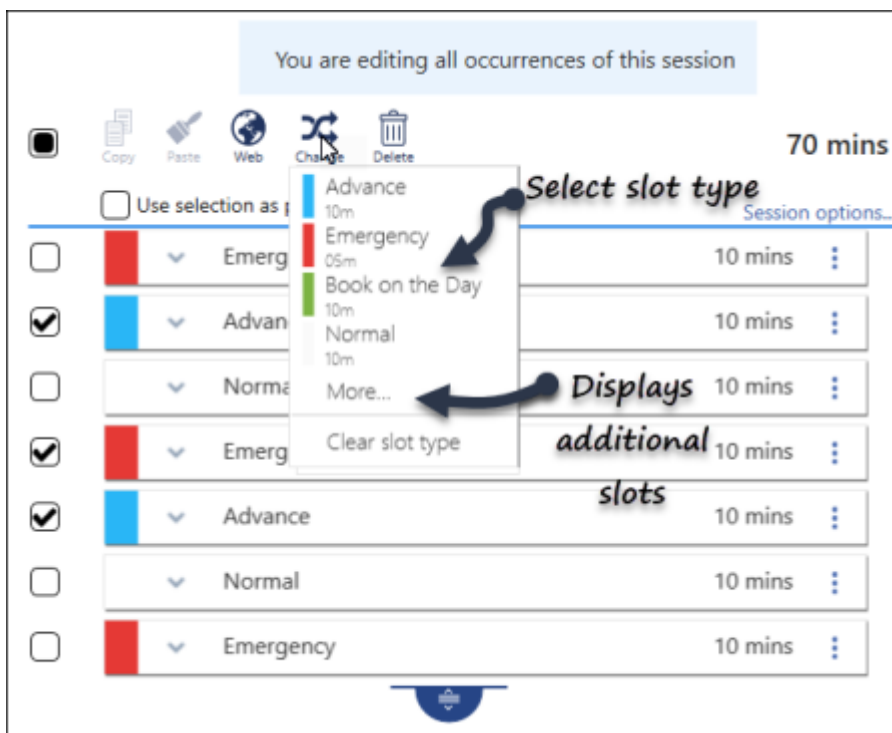
   A list of slot types display.

5. Select the new slot type from the list, optionally choose **More...** to select from all slot types.

   The slot type updates.

6. Other options for slot(s) include:

- **Copy Slot Type(s)**
  Select slot(s) to copy.
- **Paste Slot Type**
  Pastes slot(s) type into other slots.
- **Make slots web bookable**
  Patients can book these using Online Services.
- **Delete**
  Removes slots from the session.

7. Individual slots can be updated by selecting a new slot type via the drop down arrow.
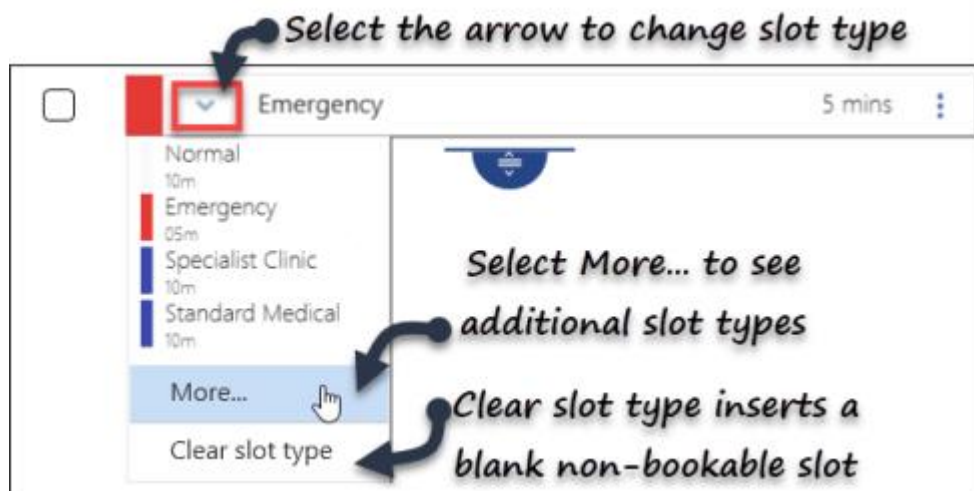
8. The session duration changes automatically if you use the **drag handle**

If you update the duration manually, the slots alter accordingly.

9. Select **Save** to save your changes, **Reset** to cancel any changes or **Sort (A-Z)** to reorder the list.
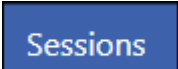
The **Sessions** view displays.

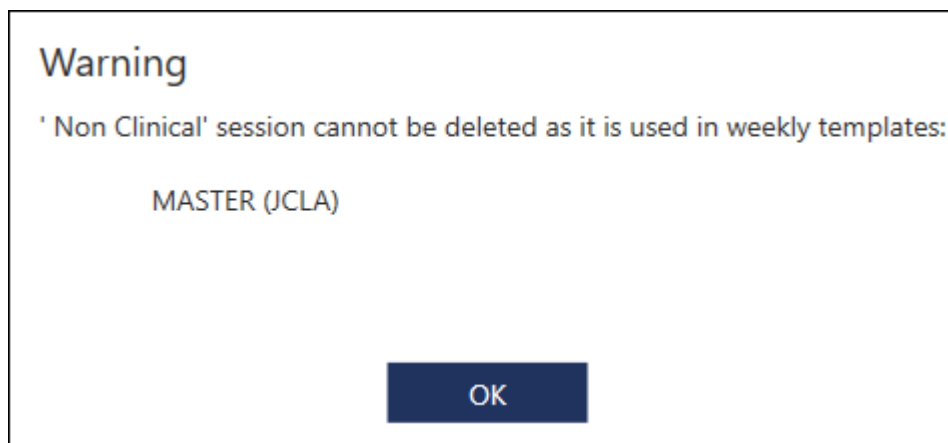See - Creating a Session on page 67 and Change Multiple Slot Types on page 75.

Delete Sessions

1. Select **Sessions** **Sessions** from the Appointments Setup Menu.
    See - Vision Appointments Setup Menu on page 9.
    The **Session** view displays.
2. Select the **Session** you want to remove.

    The **Edit** ✏ and **Delete** 🗑 options display.

3. Choose **Delete** 🗑 to remove the session.

    Note - If the session is in use a warning displays.

    Warning

    ' Non Clinical' session cannot be deleted as it is used in weekly templates:

    MASTER (JCLA)

    OK

    The session must be removed from the template before it can be deleted.

4. Select **Save** to save your changes, **Reset** to cancel any changes or **Sort (A-Z)** to reorder the list.

Save	Reset

    The **Sessions** view displays.

See - Creating a Session on page 67, Edit Sessions on page 71 and Change Multiple Slot Types on page 75.

Change Multiple Slot Types

When adding or editing a session, you can also change multiple slots at once.

Note - You can have a mixture of slots with different lengths in the session.

1. Select **Sessions** [Sessions] from the Appointments Setup Menu.
   See - Vision Appointments Setup Menu on page 9.
   The **Session** view displays.
2. Select the session you want to edit.

   The **Edit** [✏] and **Delete** [🗑] buttons activate.

3. Select the **Edit** [✏] button.
   The session displays.
4. Select multiple slots, using the tick boxes to the left of the slots.
   A menu displays at the top of the session.
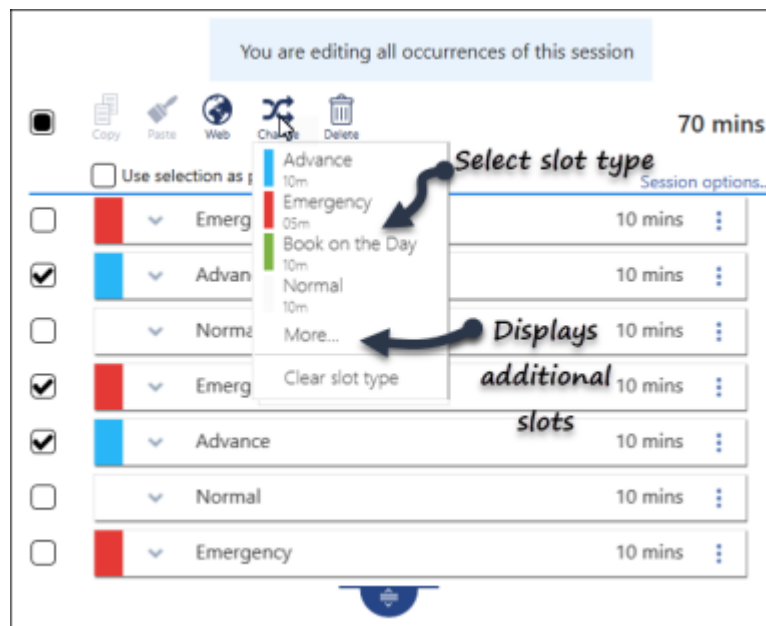
5. Select the **Change** [Change] button.
   A dropdown menu of frequently used slots displays, select **More...** to see the additional slot types.
6. Select the slot type from the list.
   The slots update.
   > **Note** - **Clear slot type** inserts a blank non-bookable slot.
7. Alternatively, change an individual slot type using the dropdown arrow to the left of the slot name.
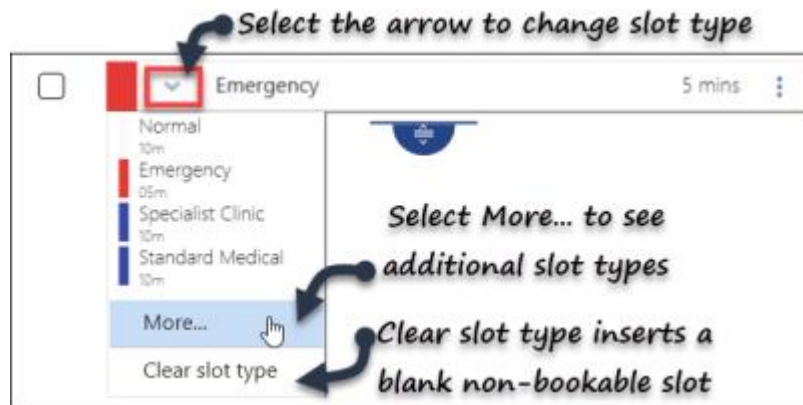
The slot type can be quickly used in other slots in the session.
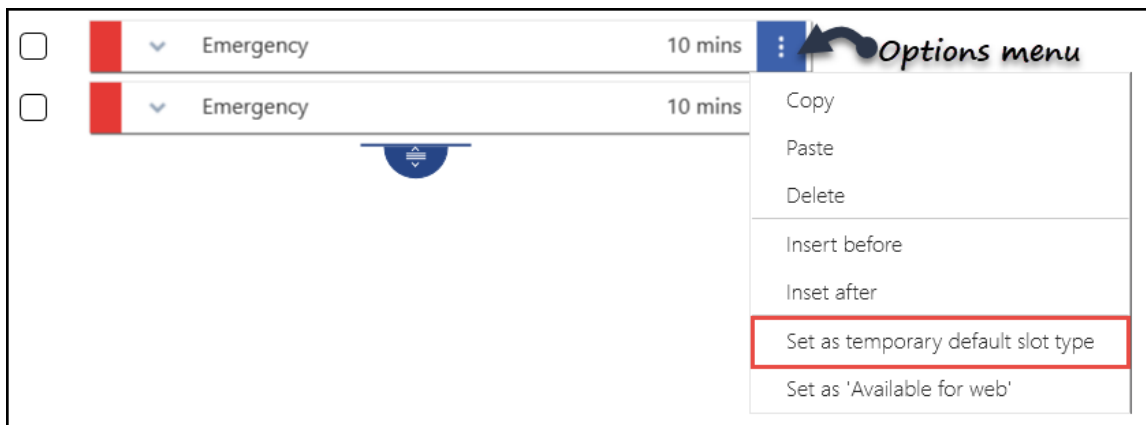
8. Select the **Options** menu to the right of the slot type you wish to use, for example emergency.
   The menu displays.

9. Select **Set as temporary default slot type**.
10. Click each slot you want to change to the new slot type, ie change advance to an emergency slot.

11. Select **Save** to save your changes, **Reset** to cancel any changes or **Sort (A-Z)** to reorder the list.

12. The **Sessions** view displays.

Note - Options for slot(s) include:

- **Copy Slot Type(s)**
  Select slot(s) to copy.
- **Paste Slot Type**
  Pastes slot(s) type into other slots.
- **Make slots web bookable**
  Patients can book these online.
- **Delete**
 Removes slots from the session.

See - Slot Patterns on page 78, Creating a Session on page 67 and Edit Sessions on page 71.

Slot Patterns

Sometimes, you may want a mixture of slots in a session, if these follow a pattern, this can be used when creating the session.

Note - You can have a mixture of slots with different lengths in the session.

1. Use the drag handle to extend the session for the length of the basic pattern, for example 3 slots.
2. Then click on the drop down arrow to change the slot type.
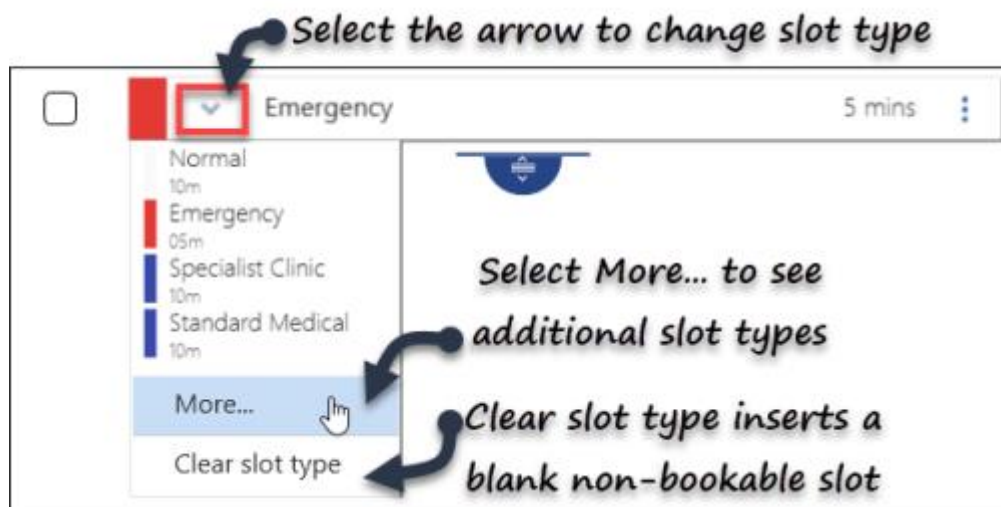
A dropdown menu of frequently used slots displays, select **More...** to see the additional slot types.

3. Select the slot type from the list.
   Note - Clear slot type inserts a blank non-bookable slot.
4. Repeat the slot type changes, until you have your pattern.
5. Tick the boxes to select the slots you want to use for the pattern.

Alternatively, all slots can be selected by using the selector at the top left of the session.

Once you have more than one slot ticked, the **Use selection as pattern** option activates.

6. Tick the **Use Selection as a pattern** box, and drag the **drag handle** to extend the session using the slot pattern.
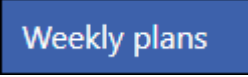

7. The slot pattern repeats as the session extends.
8. The duration updates automatically.
9. Select **Save** to save your changes, **Reset** to cancel any changes or **Sort (A-Z)** to reorder the list.

See - Creating a Session on page 67.

Add Weekly Plans

The weekly template plans for each book owner are used in the **Extension Plan** view, and become the released appointment books.

1. Select the **Weekly plans** [Weekly plans] option from the Appointments Setup Menu in Vision Appointments Setup.
   The weekly plan list displays.

2. Select **Add weekly plan...** [Add weekly plan...] from the top left of the view.
   The **Create weekly plan** view displays.

3. Enter the plan name in the box, in the top left of the view.

4. The **Sessions** define the clinic / surgery, and can be inserted by either:

   - Right click on the plan, and select a session (see above image).
     The **More...** option displays further session.

   - Alternatively, select the **Add** [+] button at the top right.
     A side bar displays containing a list of sessions.

Select the session and drag into the plan. As you drag the session, the side bar moves out of view.

5. Once the sessions are in the plan, they can be dragged to a different time if required.
6. To copy the session into additional days, right click on a session and select copy. Move to the required day, right click and choose **Paste**. The plan updates.
   See - Edit Weekly Plans on page 84.
7. Optionally, time can be blocked off for other purposes.
   See - Mark as Busy on page 87.
8. Select the **Save** button at the bottom right to add the plan.

The **Weekly plans** lists displays with the new plan added.
9. Select **Save** to save your changes, **Reset** to cancel any changes or **Sort (A-Z)** to reorder the list.

See - Video Tutorials, Owner Extensions Overview on page 41, Edit Sessions on page 71, Extension Plan Overview on page 21 and Mark as Busy on page 87.
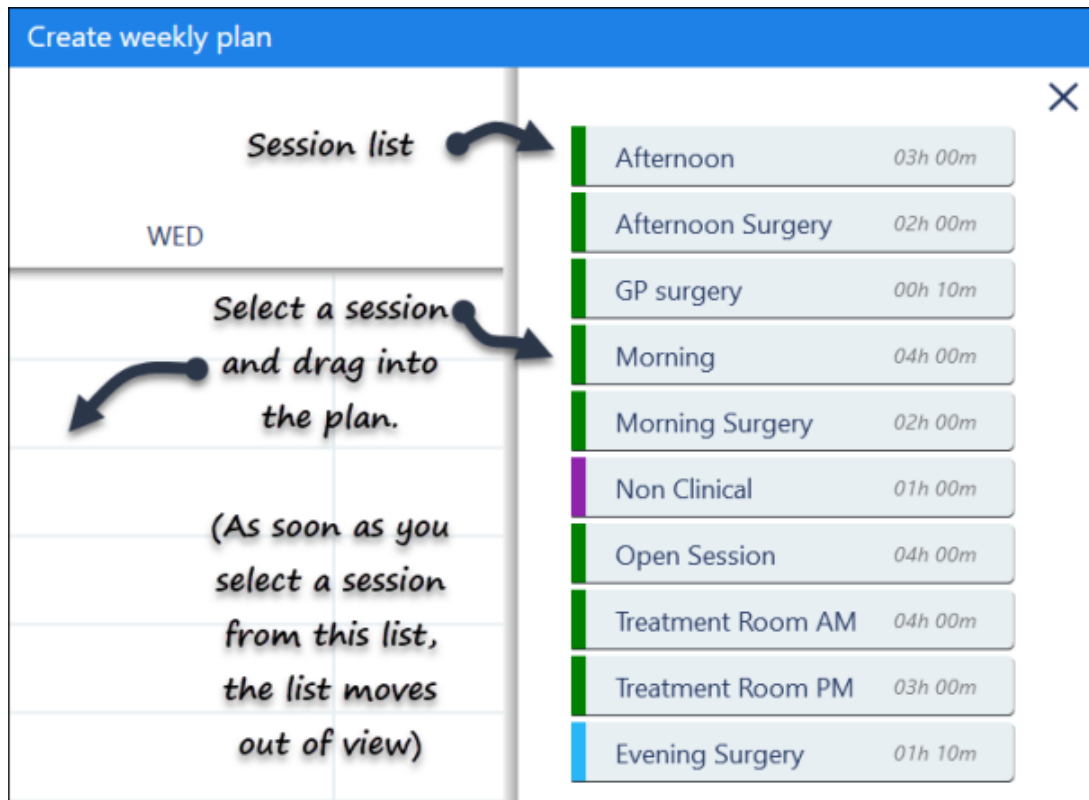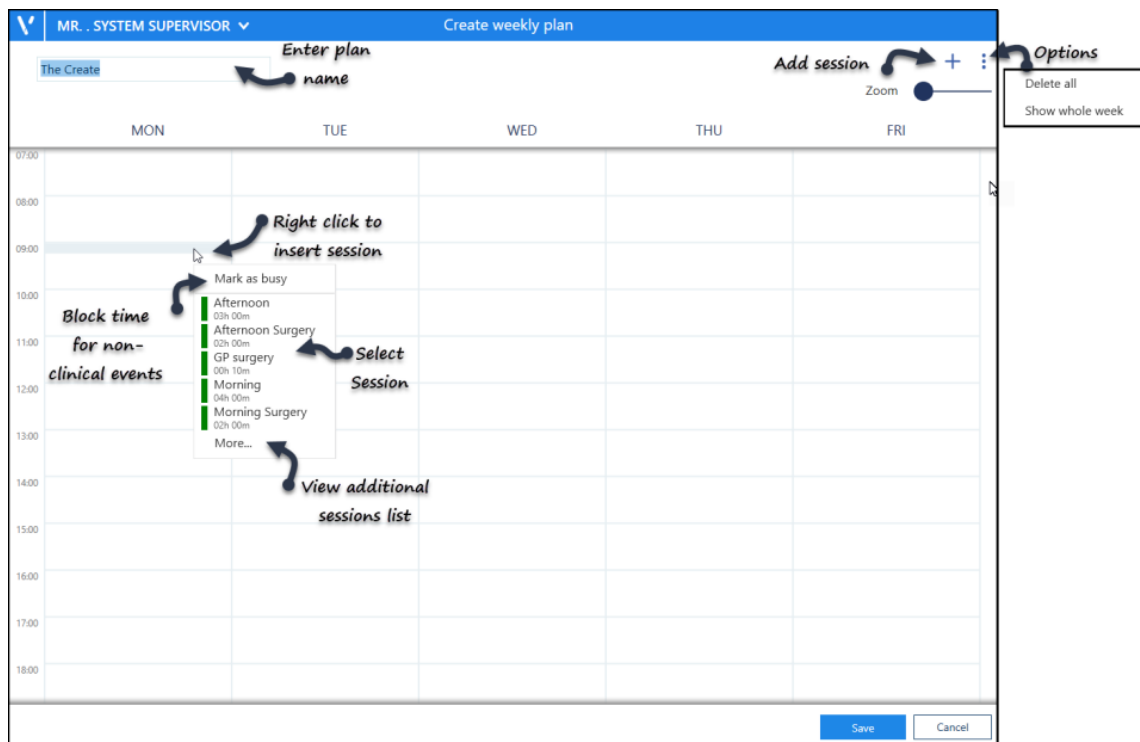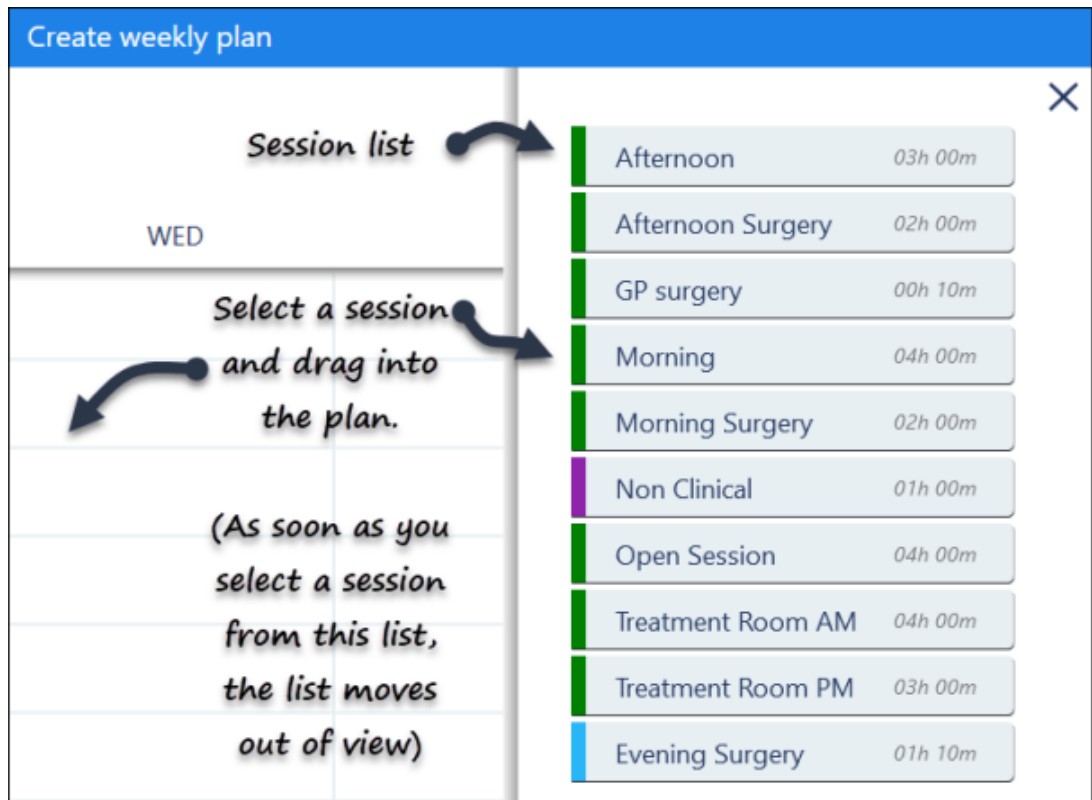
Add Weekly Plans

The weekly template plans for each book owner are used in the **Extension Plan** view, and become the released appointment books.

1. Select the **Weekly plans** [Weekly plans] option from the Appointments Setup Menu in Vision Appointments Setup.
   The weekly plan list displays.

2. Select **Add weekly plan...** [Add weekly plan...] from the top left of the view.
   The **Create weekly plan** view displays.

3. Enter the plan name in the box, in the top left of the view.

4. The **Sessions** define the clinic / surgery, and can be inserted by either:

   - Right click on the plan, and select a session (see above image).
     The **More...** option displays further session.

   - Alternatively, select the **Add** [+] button at the top right.
     A side bar displays containing a list of sessions.

Select the session and drag into the plan. As you drag the session, the side bar moves out of view.

5. Once the sessions are in the plan, they can be dragged to a different time if required.
6. To copy the session into additional days, right click on a session and select copy. Move to the required day, right click and choose **Paste**. The plan updates.
   See - Edit Weekly Plans on page 84.
7. Optionally, time can be blocked off for other purposes.
   See - Mark as Busy on page 87.
8. Select the **Save** button at the bottom right to add the plan.

The **Weekly plans** lists displays with the new plan added.
9. Select **Save** to save your changes, **Reset** to cancel any changes or **Sort (A-Z)** to reorder the list.

See - Video Tutorials, Owner Extensions Overview on page 41, Edit Sessions on page 71, Extension Plan Overview on page 21 and Mark as Busy on page 87.

Edit Weekly Plans

You can easily change the weekly plans as needed.

1. Select the **Weekly plans** Weekly plans option from the Appointments Setup Menu in the Vision Appointments Setup.
   See - Vision Appointments Setup Menu on page 9.
   The weekly plan list displays.
2. Select the plan you want to update.

   The **Edit** and **Delete** options display.

3. Select the **Edit** button.
   The weekly plan displays.
4. The following options are available:
   Drag Session

   Drag the session to a different time, to change the start time.

   Right Click Menu
   Right click on a session, this displays a menu with the following options:

- **Edit current template**
  See - Edit Sessions on page 71.
- **Edit start time**
  Change the session time manually, alternatively the session can be dragged to a different time.
- **Duplicate current template**
  Rename and modify.
  For example, save as a Week 2 plan and amend accordingly.
- **Mark as busy**
  Block time out.
  For example, a half day or non clinical meeting.
  See - Mark as Busy on page 87.
- **Copy**
  Copy session to another day or time.
- **Delete**
  Deletes session from the plan.
  This doesn't delete the actual session from the session list.
- **Sessions**
  Add a session to the plan. Select from the frequent used session list or choose **More...** to display a list of additional sessions.
- **Paste**
  This option appears after you select a session to copy.

If you right click on an empty area of the plan, the following options display:

- **Mark as busy**
  Block time out.
  For example, a half day or non clinical meeting.
  See - Mark as Busy on page 87.

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- **Paste**
  This option appears after you select a session to copy.
- **Sessions**
  Add a session to the plan. Select from the frequent used session list or choose **More...** to display a list of additional sessions.

Add Sessions

Sessions can be inserted using the **Add** button at the top right of the view.

The session list displays to the right of the plan, select a session and drag into the plan.
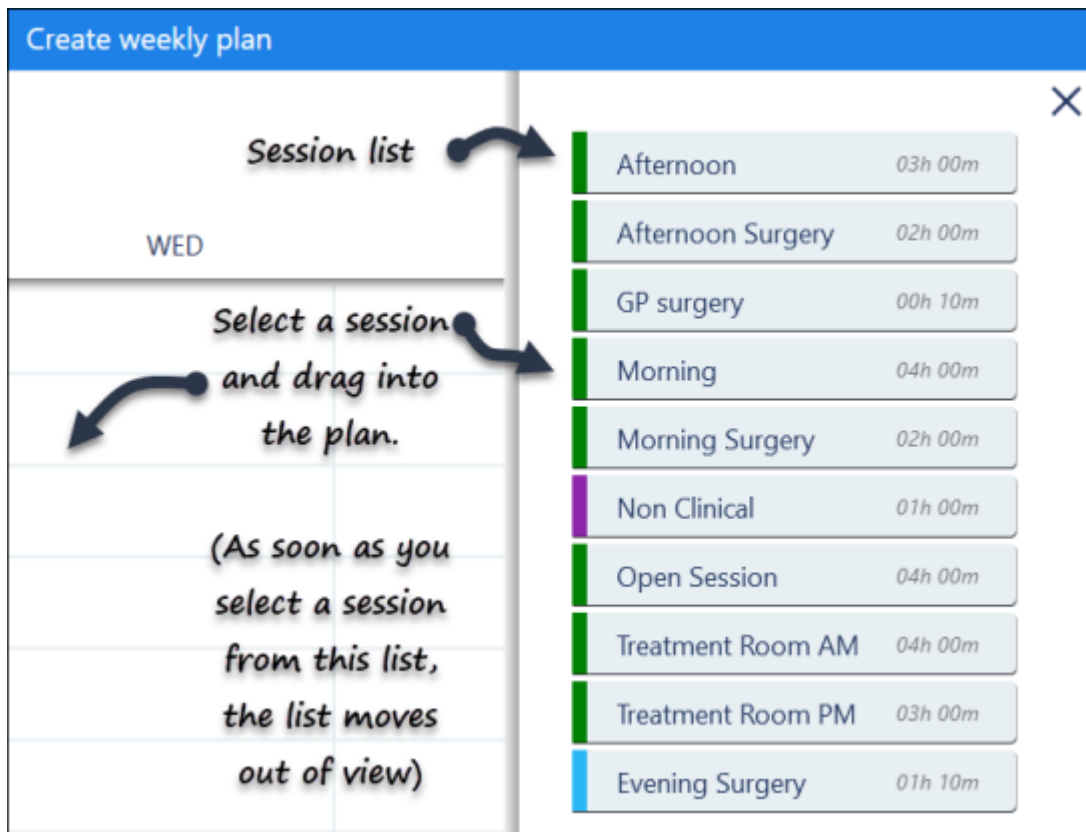

> **Note** - As soon as you select a session from the list, the session list moves out of view.

Sessions can also be added via the right click menu. See - Right Click Menu on page 84.

Options Menu

The **Options** menu at the top right of the screen has the following options:

- **Delete all**
  This clears all the sessions / busy time from the current plan.
- **Show whole week**
  If there are 7 days active, the full week displays.
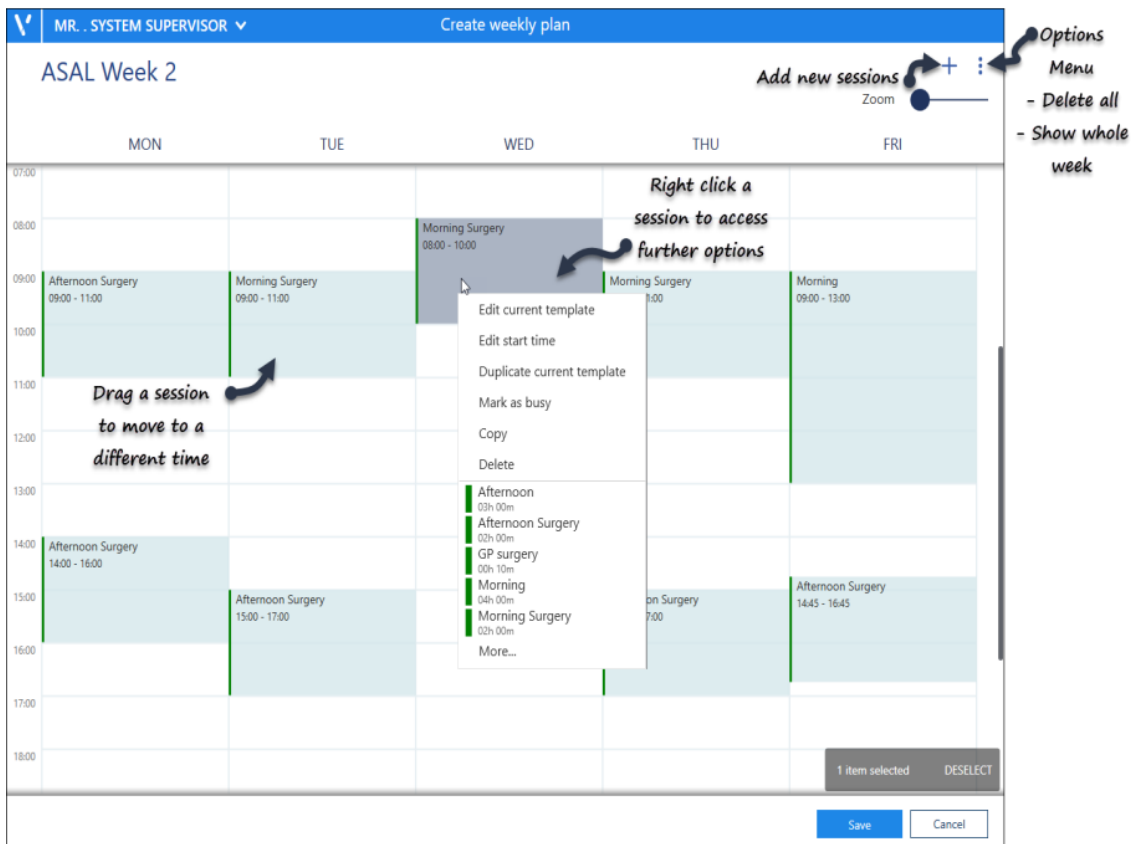
> **Note** - A **Conflict** alert displays if you try to insert a session that overlaps another.
> Choose **Remove** to take out the existing session and proceed.

5. Select the **Save** button at the bottom right to update the plan with the changes.

The **Weekly plans** list displays.

6. Select **Save** to save your changes, **Reset** to cancel any changes or **Sort (A-Z)** to reorder the list.
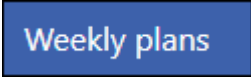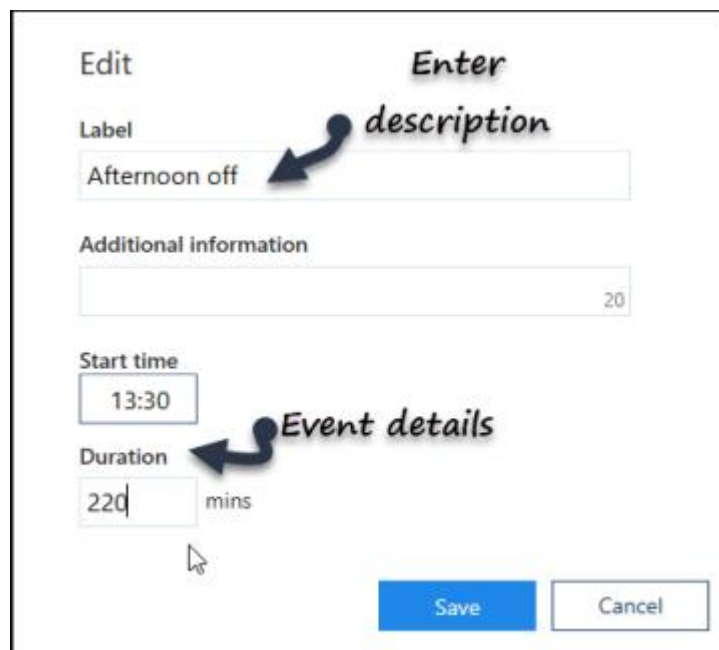

See -

Mark as Busy

Time can be blocked off for other purposes, for example, a half day or practice meeting.

1. Select the **Weekly plans** Weekly plans option from the Appointments Setup Menu in Vision Appointment Setup.
   The weekly plan list displays.
2. Select the plan you want to update, or create a new plan.
   See - Add Weekly Plans on page 82.
3. Right click on the plan, where you would like to block out time.
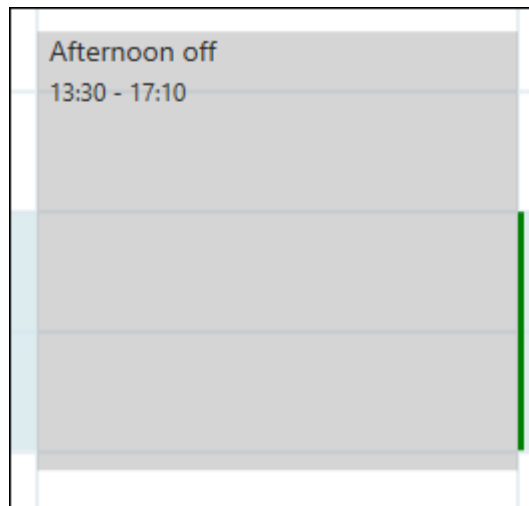   A menu displays.
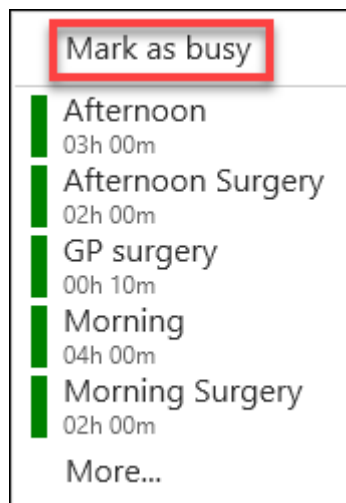
4. Select **Mark as busy**.
   The **Edit** popup displays.
5. Enter the **Event** description in the **Label** box. For example, half day or trainee tutorial.
   Optionally, record further details in the **Additional information** box.

6. Enter the **Start time**.
7. Enter the **Duration**.
8. Select the **Save** button at the bottom right to add the event.
   The event displays in the planner.

9. Select the **Save** button at the bottom right to update the plan.

See - Add Weekly Plans on page 82 and Edit Weekly Plans on page 84.

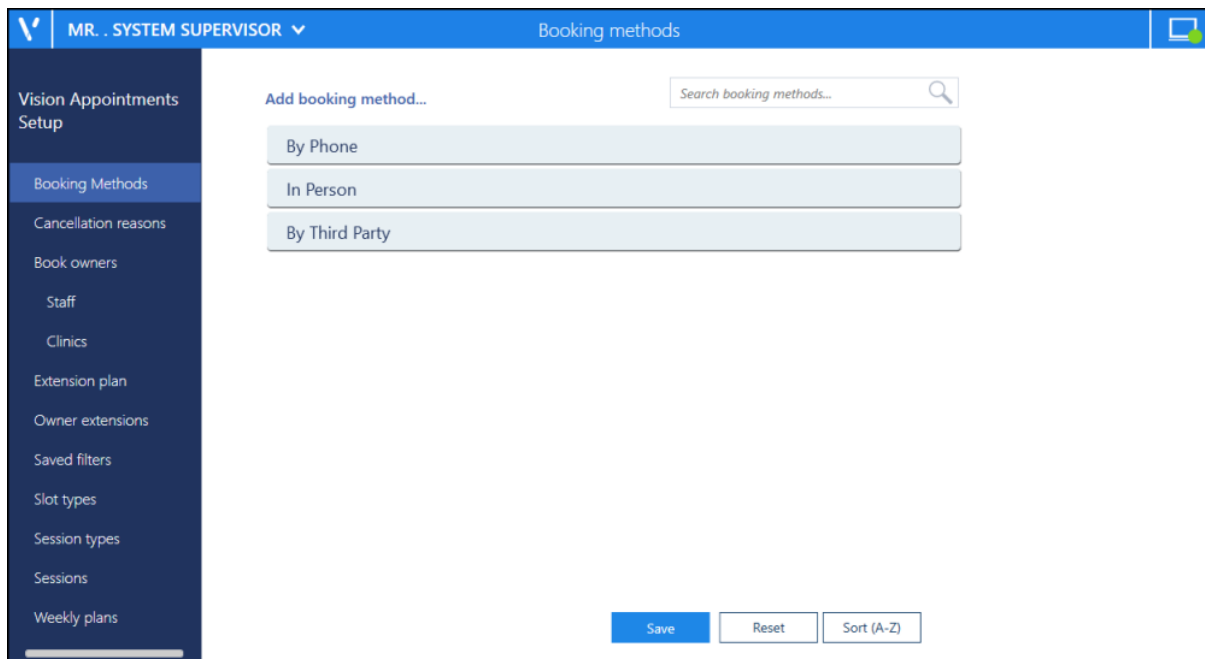# Utilities

Booking Methods

Booking Methods are used to audit how appointments are being booked.

To view your Booking Methods:

1. From the **Vision Appointments Setup menu**, select **Booking Methods**

    Booking Methods
    .

2. The **Booking methods** screen displays:

The list can be ordered, usually most frequently used first, by dragging and dropping the reasons into order.

You can also use **Search booking method** to find a reason if required.

See Adding a Cancellation Reason on page 94 and Editing or Deleting Cancellation Reasons on page 95 for details.
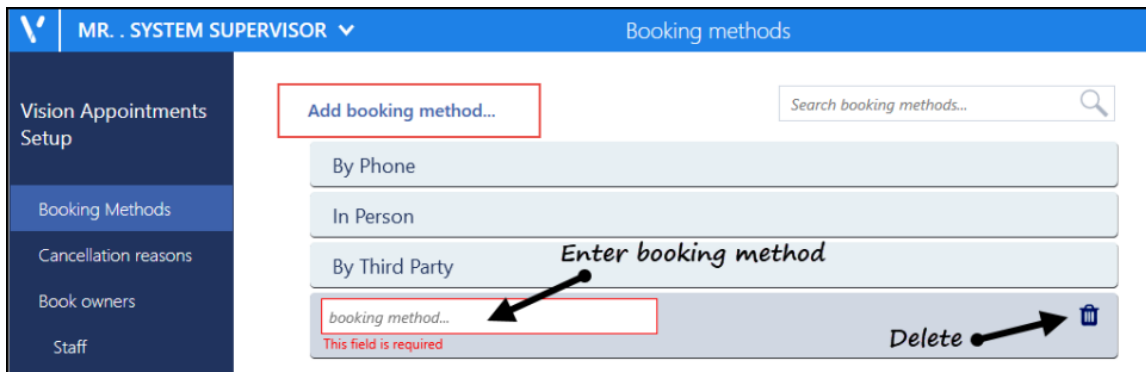
Adding Booking Methods

To add Booking Methods:

1. From the **Vision Appointments Setup menu**, select **Booking Methods**

   .
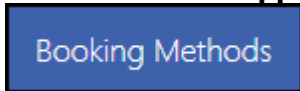
2. The **Booking methods** screen displays.
3. Select **Add booking method** and new **booking method** displays at the end of the list:

4. Enter the booking method name.
5. Optionally, you can drag and drop it to where you want it to appear in the list.
6. Select **Save** to save your changes, **Reset** to cancel any changes or **Sort (A-Z)** to reorder the list.

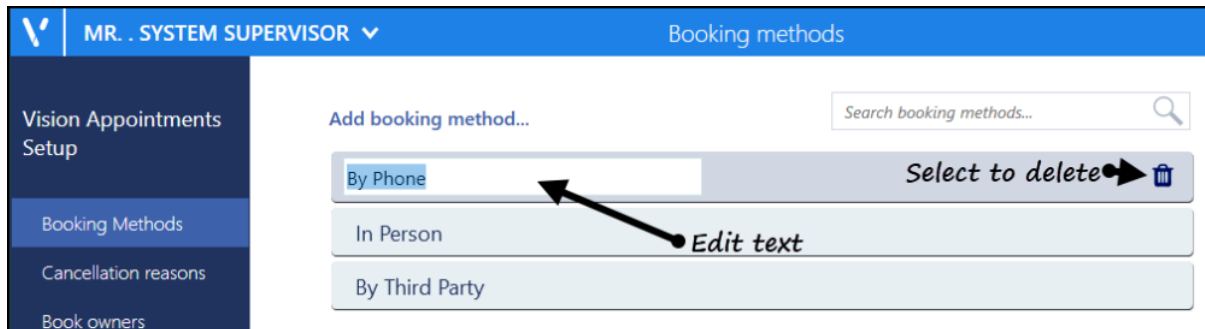See Booking Methods on page 90 and Editing or Deleting Booking Methods on page 92 for details.

Editing or Deleting Booking Methods

To edit or delete a **Booking Method**:

1. From the **Vision Appointments Setup menu**, select **Booking Methods**

   Booking Methods

   .

2. The **Booking methods** screen displays.

3. Select the method you wish to edit or delete and either:
   - Update the text or
   - select **Delete**

4. Select **Save** to save your changes, **Reset** to cancel any changes or **Sort (A-Z)** to reorder the list.
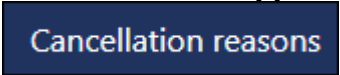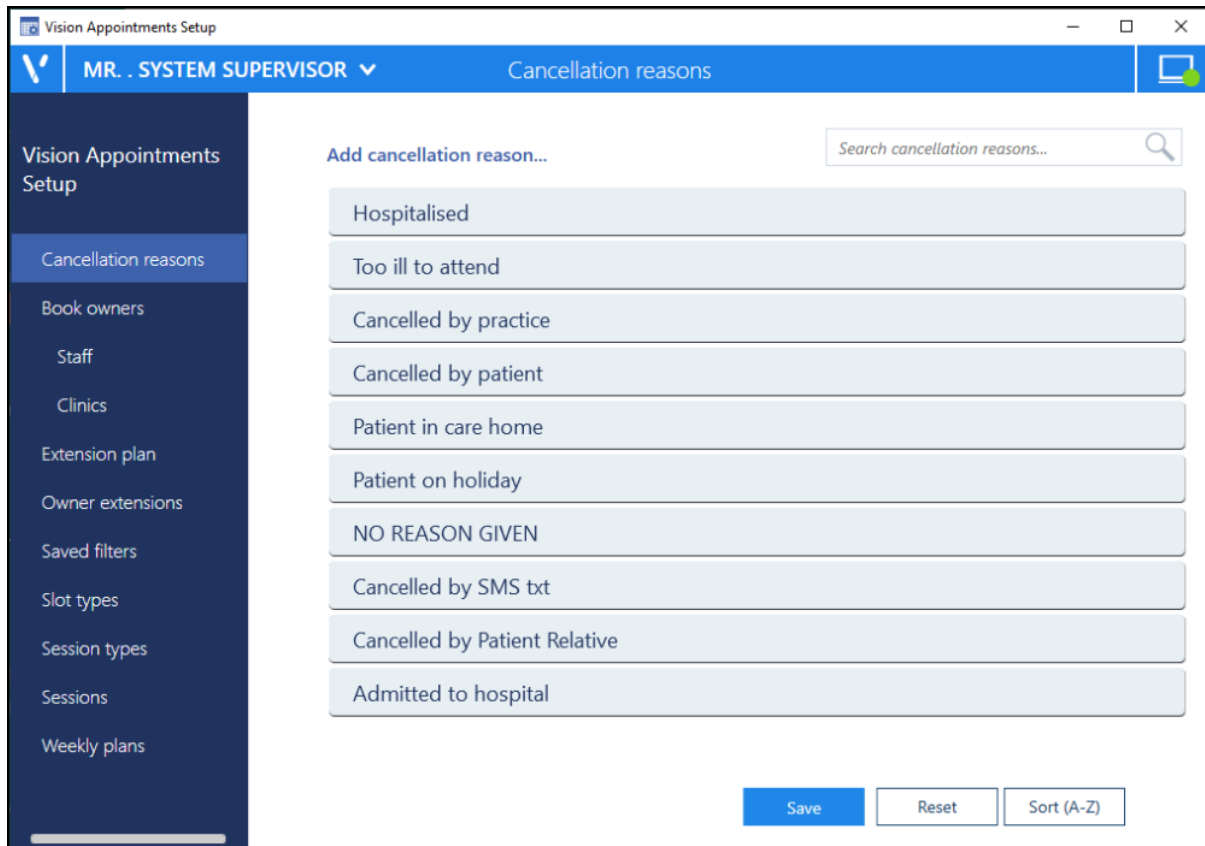

See for details.

Cancellation Reasons

Cancellation reasons are used to audit the why booked appointments are being cancelled. These are used both in practice and by the patient via online services.

To view your Cancellation reasons:

1. From the **Vision Appointments Setup menu**, select **Cancellations reasons**

    Cancellation reasons.

2. The **Cancellation reasons** screen displays:

The list can be ordered, usually most frequently used first, by dragging and dropping the reasons into order.

You can also use **Search cancellation reasons** to find a reason if required.

See Video Tutorials, Adding a Cancellation Reason on page 94 and Editing or Deleting Cancellation Reasons on page 95 for details.
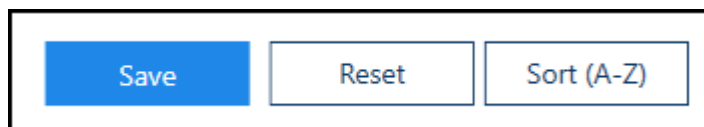
Adding a Cancellation Reason

To add a Cancellation reason:

1. From the **Vision Appointments Setup** menu, select **Cancellation Reasons**

   .

2. The **Cancellation Reasons** screen displays.
3. Select **Add cancellation reason** and new **cancellation reason** displays at the end of the list:
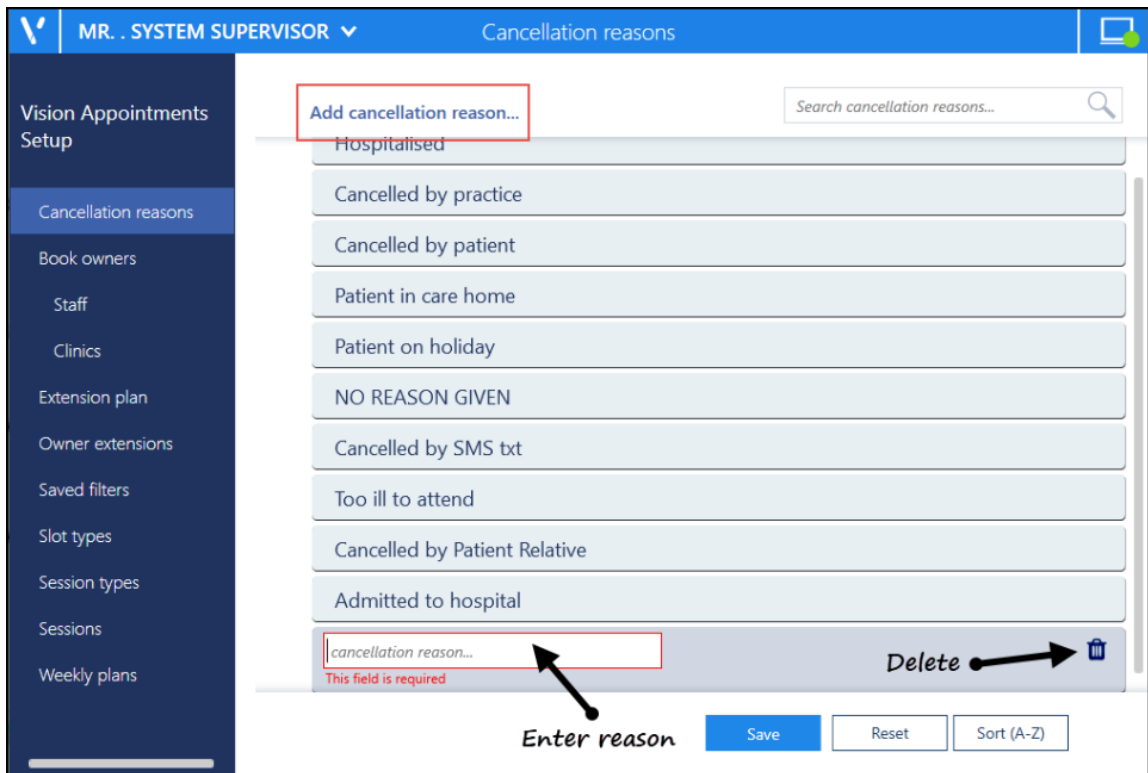
4. Enter the cancellation reason name.
5. Optionally, drag and drop it to the appropriate place in the list.
6. Select **Save** to save your changes, **Reset** to cancel any changes or **Sort (A-Z)** to reorder the list.

See Video Tutorials, Editing or Deleting Cancellation Reasons on page 95 and Cancellation Reasons on page 93 for details.

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Editing or Deleting Cancellation Reasons

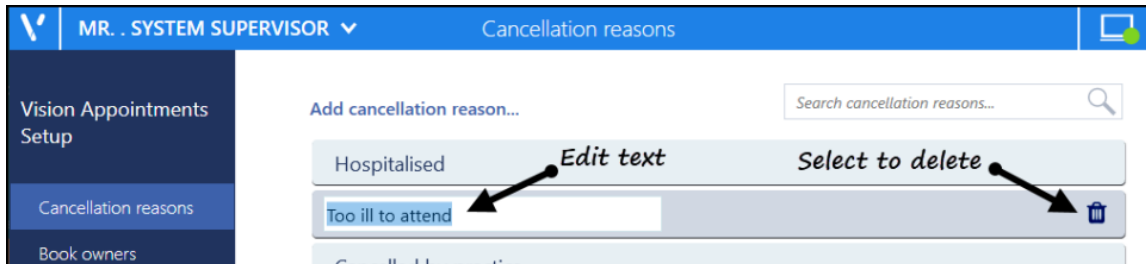To edit or delete a **Cancellation reason**:

1. From the **Vision Appointments Setup** menu, select **Cancellation reasons**

   .

2. The **Cancellations reasons** screen displays:

3. Select the reason you wish to edit or delete and either:
   - Update the text or
   - select **Delete**

4. Select **Save** to save your changes, **Reset** to cancel any changes or **Sort (A-Z)** to reorder the list.
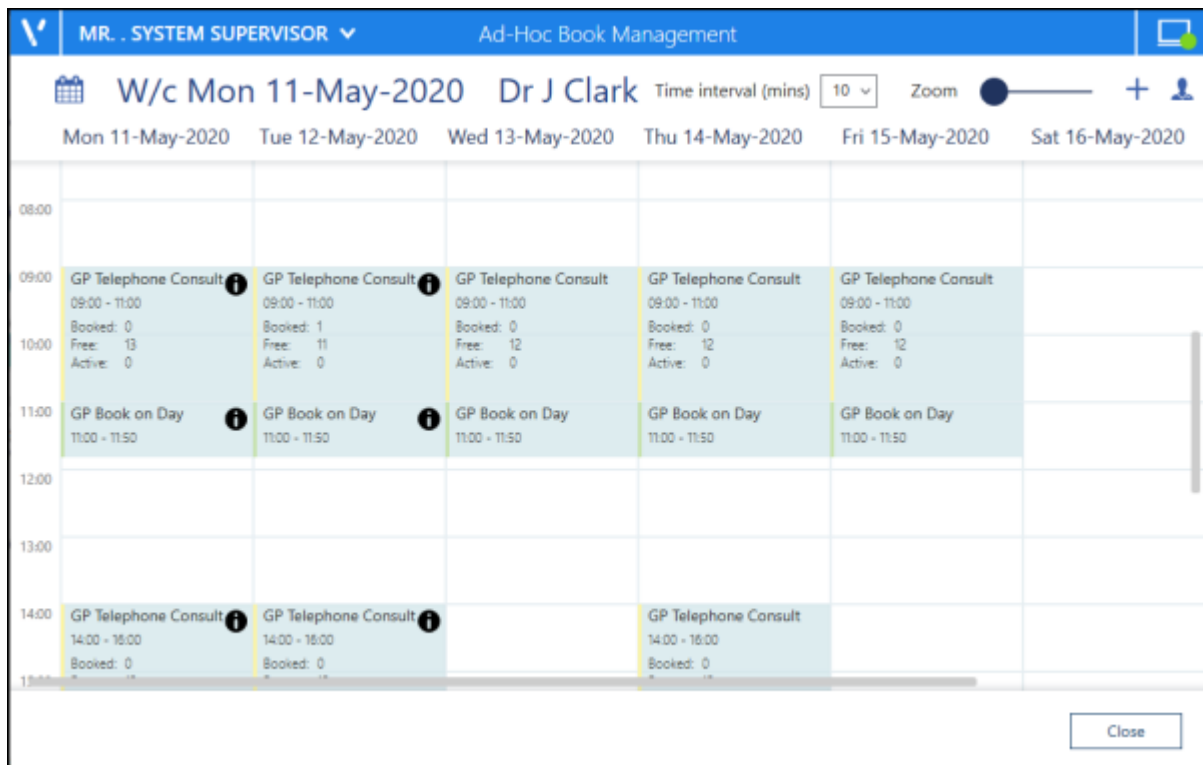

See Adding a Cancellation Reason on page 94for details.

Ad-Hoc Book Management

The **Ad-Hoc Book Management** screen allows you to manage existing plans as and when required.

To access the **Ad-Hoc Book Management** screen:

- From the **Extension Plan** screen, you can either:

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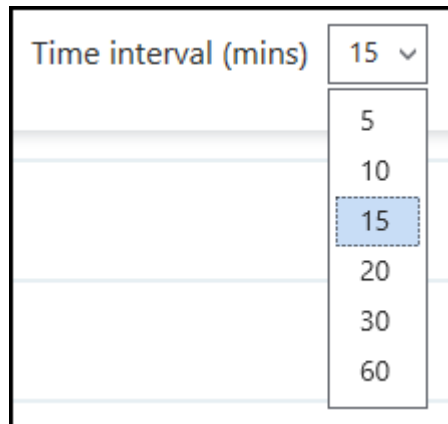   - Right click on owner and select **Manage appointments**

From the **Ad-Hoc Book Management** screen, you can display a combination or **Book owners** and dates.

To configure the screen:

1. Select **Add or remove book owners** , select the initial book owner and select a date from the calendar.
2. Repeat these step 1 until all the book owners with session you wish to copy or move display on the **Ad-Hoc Book Management** screen.
3. You can now:
    - **Copy sessions** - Sessions can be copied from one day/book owner to another. Hold the Control key (Ctrl), select drag and drop the session you want to copy to where you want it.
    - **Move sessions** - Sessions can be moved from one day/book owner to another, if appointments have been booked, they are moved with the session. Simply drag and drop the session you want to move, to the new day, time and owner.

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Change the **Time intervals** from 5 - 60 minute increments to have more control over the times you set your session to start. Simply select the time frame 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.

England Only

- GP Connect Appointments

GP Connect Appointments

GP Connect is an NHS Digital project designed to enable access to patient related information recorded on any of the participating systems across care settings. It relies on sharing agreements being signed between practices and authorised third parties. All data is exchanged via the **National Spine**.

The ability to release appointments to third parties that you have a sharing agreement with, for example NHS111, relies on you using **Vision Appointments Setup**.

An appointment slot that is available for booking by a third party is highlighted by a **GP Connect** tag .

Pre-requisites
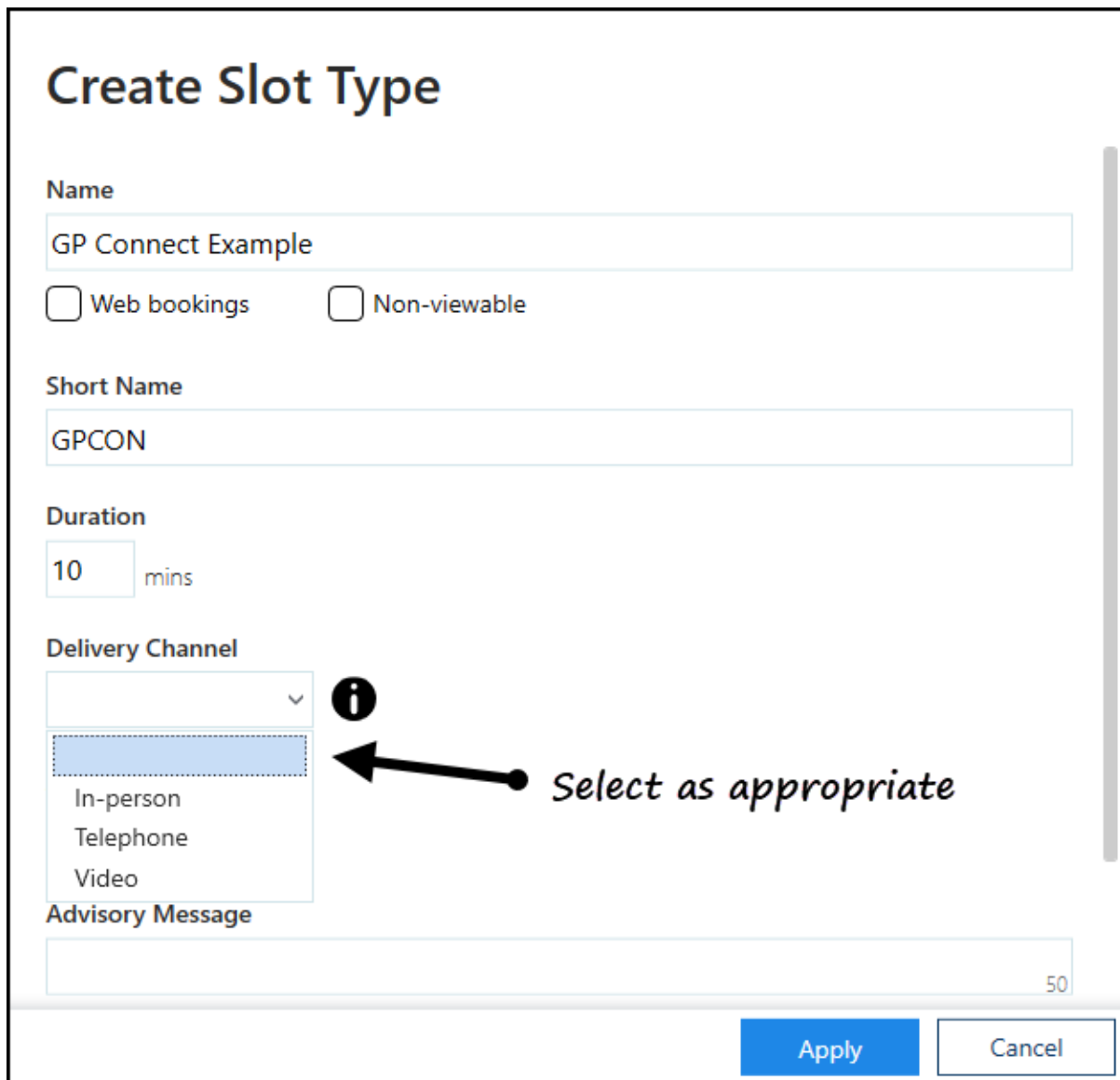
In order to create GP Connect appointments you must:

- Have migrated to **Vision Appointments Setup**, contact your Account Manager to organise migrating to our newest management tool for setting up and maintaining your Appointments books
- Be running the minimum of:
    - **Vision 3 release DLM 730** for set up
    - **Vision 3 release DLM 760** for Third party utilisation

See Checking your DLM for details on how to check your version of Vision 3.

Setting Up GP Connect Appointments

To create an appointment that is available to a third party via GP Connect, the following conditions must be met:

- The **ODS Code** of the organisations you want to share your appointments with, see Adding ODS Codes on page 103 for details.
- **Slot Types** must have a **Delivery Channel**, this tells the booker the type of appointment they are booking:

See Adding a Slot Type on page 59 for further details.

- **Sessions** must have a **Practitioner Role** and **Location**, this tells the booker the type of clinician and where they are booking:
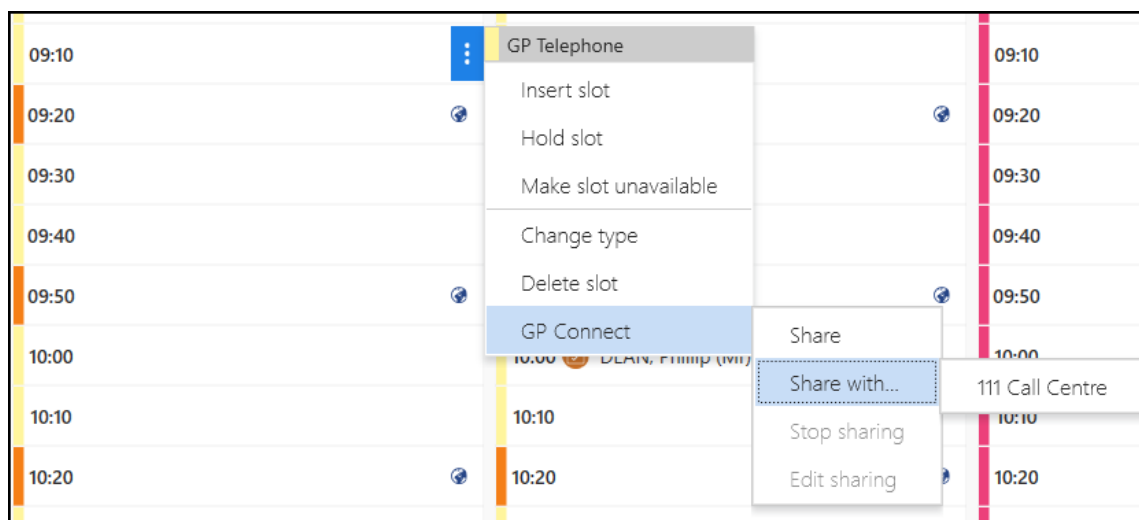
See Creating a Session on page 67 for further details.

- An appointment slot must currently be tagged manually as a **GP Connect** slot, this step must be done from **Vision Appointments**:
    - To tag a slot as **GP Connect** available, from **Vision Appointments**, from the slot required, select **Options** ⋮ - **GP Connect - Share with** and then select either the specific organisation or the **Preset** group.

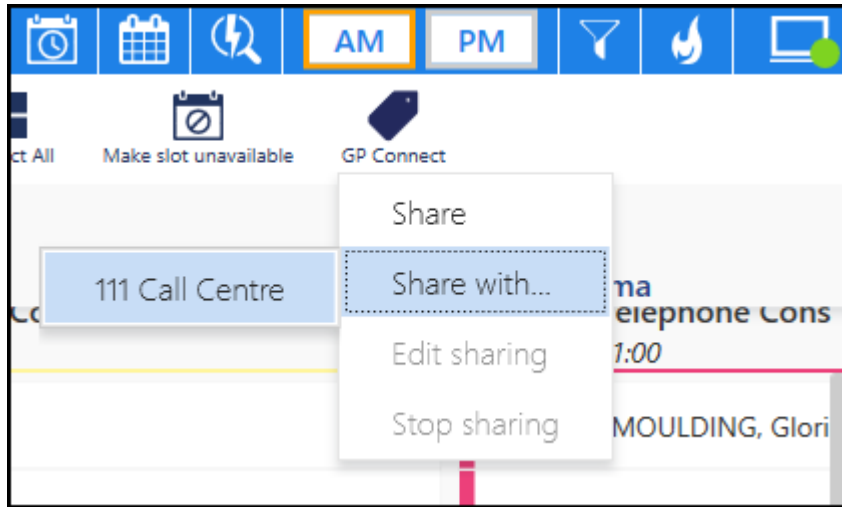   - To tag a selection of slots as **GP Connect** available, from **Vision Appointments**, right click on all the slots required and select **GP Connect** ⬚ - **Share with** and then select either the specific organisation or the **Preset** group.

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Adding ODS Codes

To share appointments with third party organisations, you must add their **ODS Code** to **Vision Appointments Setup**.

See the ODS portal website for further details.

To add an **ODS Code**:

1. From the **Vision Appointments Setup menu**, select **ODS Codes**.
2. Select **Add ODS code**.
3. Enter the ODS code for the organisation you want to share appointments with.
4. Select **Save**.

ODS Codes should be added to groups, known as **GP Connect Presets**.

See Creating GP Connect Presets on page 104 and GP Connect Appointments on page 99 for details.

Creating GP Connect Presets

GP Connect Presets enable you to create groups of third parties for the sharing of appointments via GP Connect.

To create GP Connect Presets:

1. From the **Vision Appointments Setup menu**, select **Presets**.
2. Select **Add preset**.
3. The **Create GP Connect Preset** screen displays:

Create GP Connect Preset

Name

[   ]

Required info

☑ GP Connect (Mandatory)

Organisation type(s)

☐ Urgent Care   ☐ GP Practice

☐ ODS Code(s)

☐ 007HCD

☐ 06HAK

[**Apply**]   [Cancel]

4. Complete as follows:
   - **Name** - Enter a name for the group
   - **GP Connect** - Ticked by default, only remove this tick to inactivate the group
   - **Organisation types**
     - **Urgent Care** - Tick if this is an Urgent Care group, for example, NHS111
     - **GP Practice** - Tick if this is a GP Practice group, for example, members of your Federation.
   - **ODS Code(s)** - Tick to include all your organisations to this **Preset** or tick the individual organisations required
5. Select **Apply**.

See GP Connect Appointments on page 99 for details.