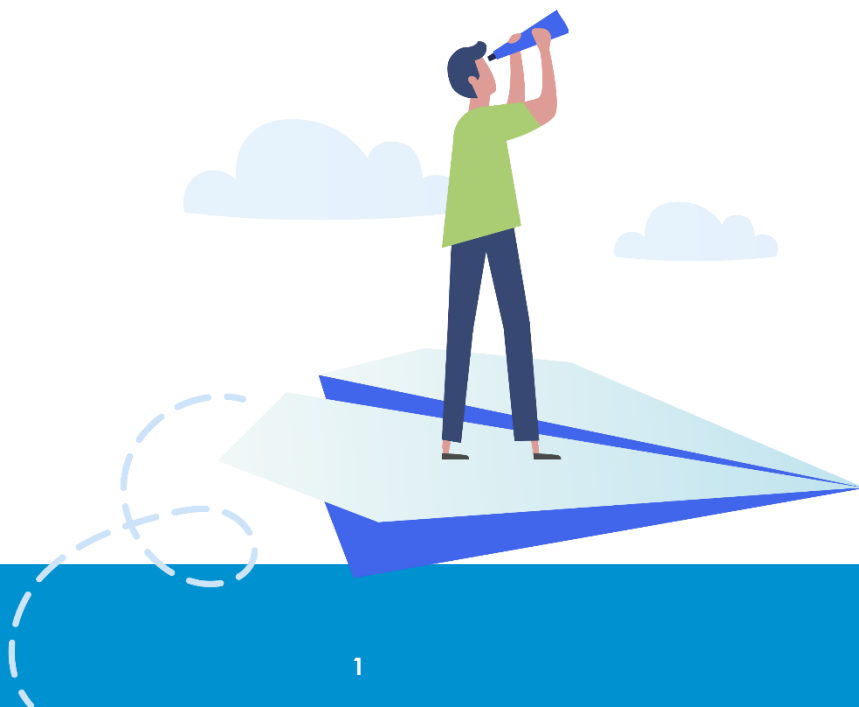




# Patient Services Appointments User Guide

Version 2.1  
4<sup>th</sup> July 2023



## Copyright © 2023 Cegedim Healthcare Solutions

All Rights Reserved

Cegedim Healthcare Solutions is the trading name of Cegedim Rx Ltd and In Practice Systems Limited.

No part of this document may be photocopied, reproduced, stored in a retrieval system or transmitted in any form or by any means, whether electronic, mechanical, or otherwise, without the prior written permission of Cegedim Healthcare Solutions.

No warranty of accuracy is given concerning the contents of the information contained in this publication. To the extent permitted by law, no liability (including liability to any person by reason of negligence) will be accepted by Cegedim Healthcare Solutions, its subsidiaries or employees for any direct or indirect loss or damage caused by omissions from or inaccuracies in this document.

Cegedim Healthcare Solutions reserves the right to change without notice the contents of this publication and the software to which it relates.

Product and company names herein may be the trademarks of their respective owners.

Registered name: Cegedim Rx Ltd. Registered number: 02855109

Registered name: In Practice Systems Limited. Registered number: 01788577

Registered address: Studio F5 Battersea Studios 1, 82 Silverthorne Road, London SW8 3HE

Website: <https://www.cegedim-healthcare.co.uk/>



# Contents

<b>Online Appointments.....</b>	<b>4</b>
Introduction.....	4
Overview of Enabling Online Appointments .....	4
Enabling Patient Online Services .....	5
Enabling Online Appointments .....	8
Configuring Online Appointments.....	8
Creating Online Appointment Slots .....	22
Online Appointment Reports.....	34
Creating a Patient Online Account .....	41
Appendix.....	43

# Online Appointments

## Introduction

Online Appointments enables you to create a website accessible by patients to book, check and cancel appointments. You determine which appointment slots are available online and can customise how your patient's use the service. You are responsible for allowing patients access and you can disable online services for patients if required.

The benefits of online appointments are:

- Less demand on a busy reception.
- Patients no longer have to queue at the practice or on the telephone to manage their appointments.
- Patients can manage their appointments out of hours from wherever they have internet access.
- The reduction of 'Did Not Attends' (DNAs) by making it easier to cancel or change appointments.

## Overview of Enabling Online Appointments


To enable online appointments:

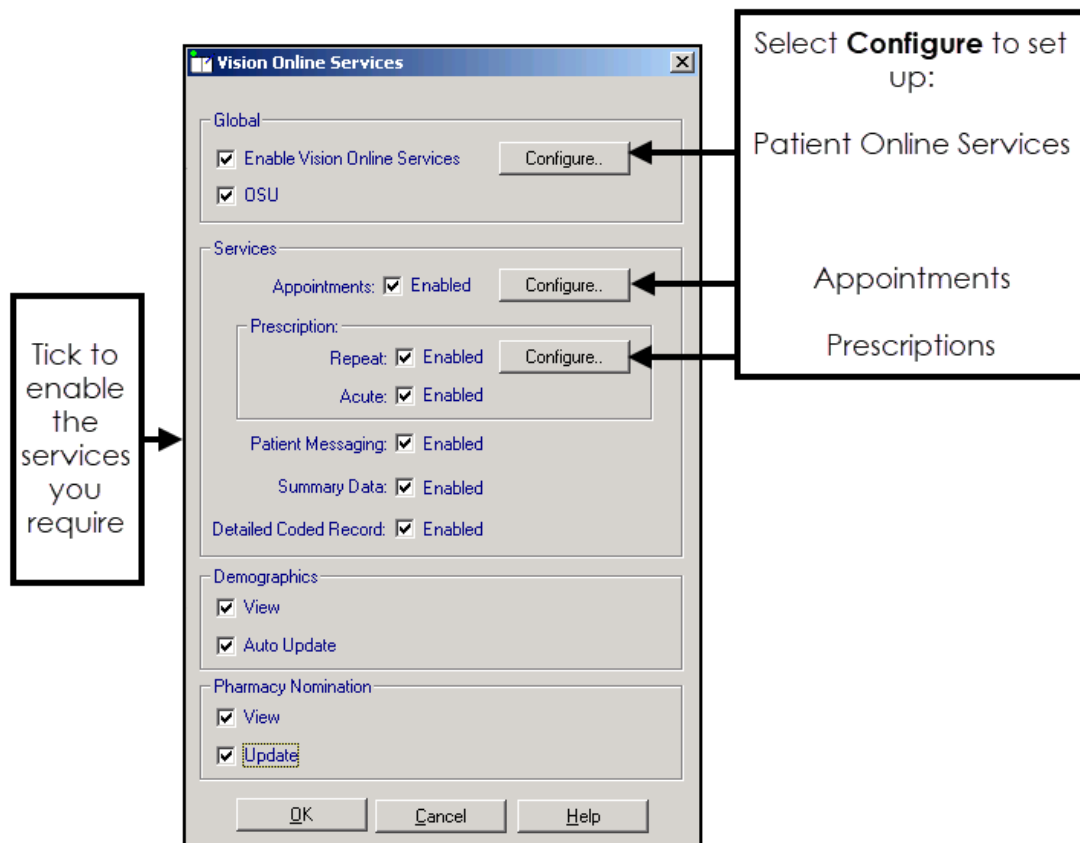
- **Enable Online Services** - You need to enable and configure **Patient Online Services**, see [Enabling Patient Online Services](#) on page 5 for details.
- **Enable and Configure Online Appointments** - You need to enable and configure **Patient Online Appointments**, see [Configuring Online Appointments](#) on page 8 for details.
- **Register Patients for Patient Online Services** - You need to register patients for online services and print out their Registration Confirmation Letter, see [Creating a Patient Online Account](#) on page 41 for details.
- **Appointment Session and Slot Setup** - You may need to amend appointment sessions, especially if **Appointments** is used by one or more branch surgeries, see [Creating Online Appointment Slots](#) on page 22 and [Setting Up Appointment Sessions for Branch Surgeries](#) on page 37 for details.

## Enabling Patient Online Services

To enable patient online services:

1. From **Vision 3 - Management Tools**, select **Control Panel - File**

**Maintenance - Online**  and the **Vision Online Services** screen displays:



2. Tick **Enable Vision Online Services** to enable patient online services.
3. You now need to configure your global settings:

## Setting your Global Configuration

Within **Global**, select **Configure** .

The following three global tabs require configuration:

- **Welcome** on page 6
- **Registration** on page 7 - Set a time frame for unused registration letters and un-activated accounts.
- **NHS Mail** - No Longer used.

## Welcome

The welcome message displays on the home page of the website following a successful login by your patients.

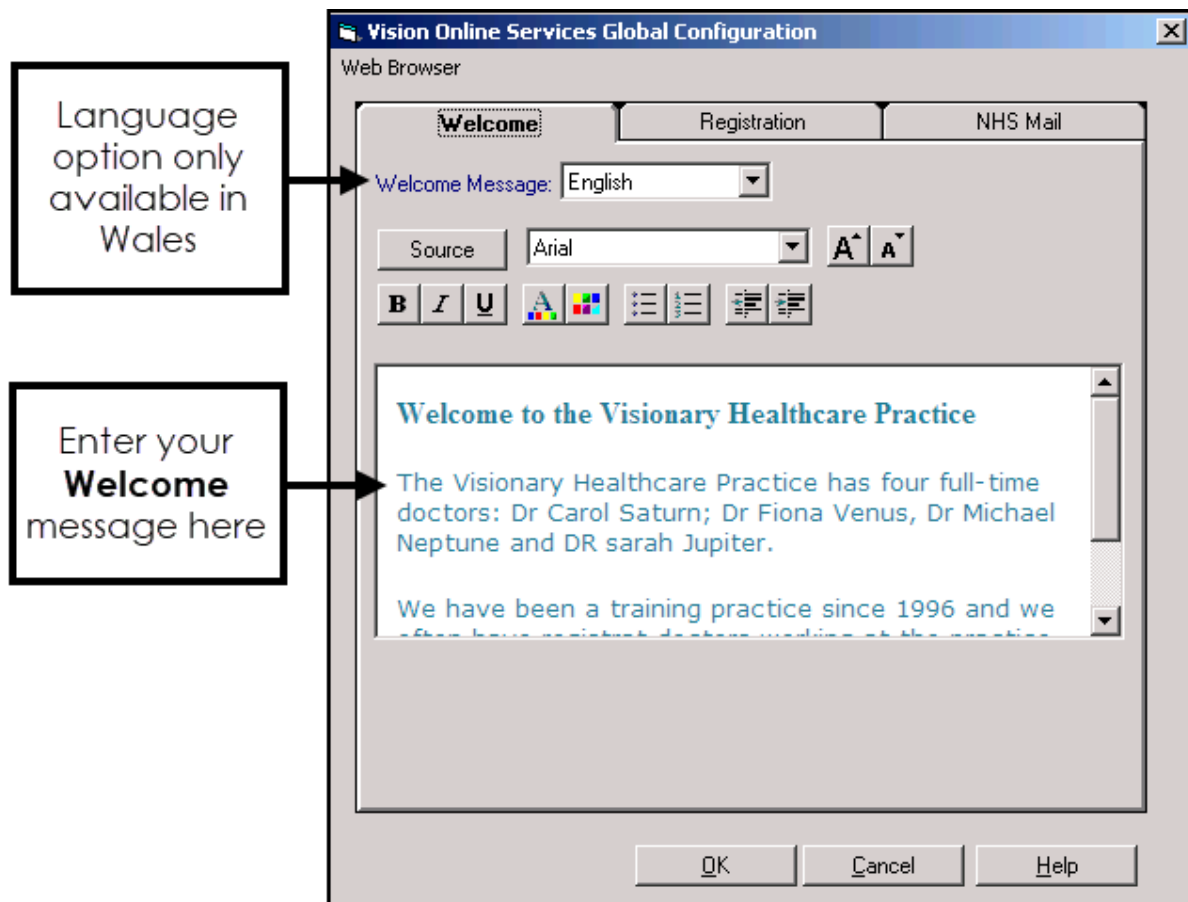
To set up the welcome message:

1. Select the **Welcome** tab and type your message in the message window using the formatting editor provided.

---

➔ See [Using the Message Editor](#) on page 44 or [Formatting HTML Messages](#) on page 45 for details.


---



2. Select **OK** to save.

**For Welsh practices only** - Repeat the above 2 step process having selected **Welsh** from the language list.

---

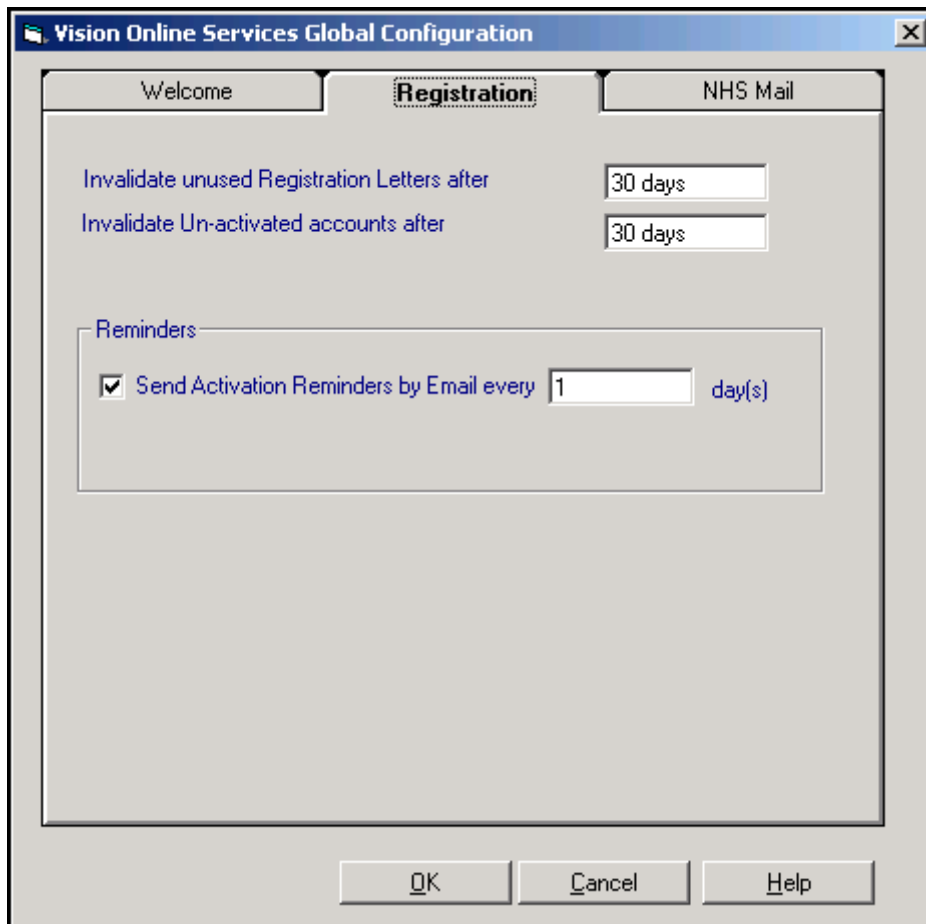
 **Note** - To help prevent confusion surrounding who your patients contact if they have a problem, please add advice to your patients within your welcome messages advising them to contact the practice if there is a query about prescriptions or appointments availability.

---

## Registration

From the **Registration** tab, set up the following:

- **Invalidate unused Registration Letters after** - Select a time frame for unused registration letters to expire. The expiration date prints on the patients' registration letter.
- **Invalidate Un-activated accounts after** - Select a time frame for un-activated accounts to expire. When registering, patients receive a confirmation code which activates their account. If the account is not activated by the expiry date, they need to re-register for online services.
- **Reminders** (England, Scotland and Northern Ireland only) - Tick to send activation reminders by email every *n* day(s) (where *n* is the number of days you set). Reminders is ticked by default to enable the service. If you do not want to send email messages remove the tick from the appropriate box:



The screenshot shows the 'Registration' tab of the 'Vision Online Services Global Configuration' dialog box. It features three tabs: 'Welcome', 'Registration' (selected), and 'NHS Mail'. The 'Registration' tab contains the following configuration options:

- 'Invalidate unused Registration Letters after' is set to '30 days'.
- 'Invalidate Un-activated accounts after' is set to '30 days'.
- The 'Reminders' section is expanded, showing a checked checkbox for 'Send Activation Reminders by Email every 1 day(s)'.

At the bottom of the dialog box are three buttons: 'OK', 'Cancel', and 'Help'.

You have now activated Online Services and need to configure the individual modules.

## Enabling Online Appointments

To enable online appointments:

1. From **Vision 3 - Management Tools**, select **Control Panel - File**



**Maintenance - Online Services** and the **Vision Online Services** screen displays.

2. Tick **Appointments** to enable online appointments.
3. Now select **Configure** to customise how appointments works for your practice.

## Configuring Online Appointments



**Note** - You must have System Administrator rights to enable and configure Patient Online Services (England only - see [RBAC Help](#) in the **Vision 3 Front Screen Help Centre** for details).

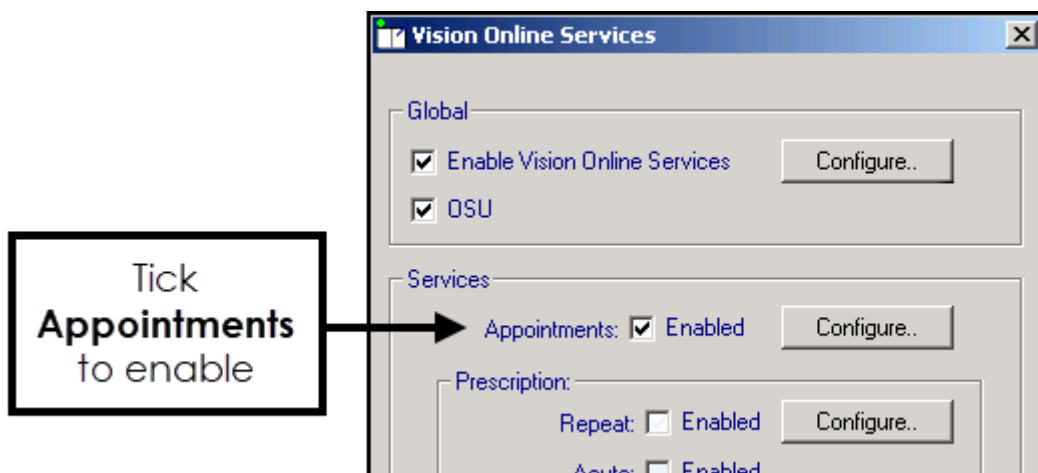
To enable online appointments:

1. From **Vision 3 - Management Tools** select **Control Panel - File**



**Maintenance - Online**

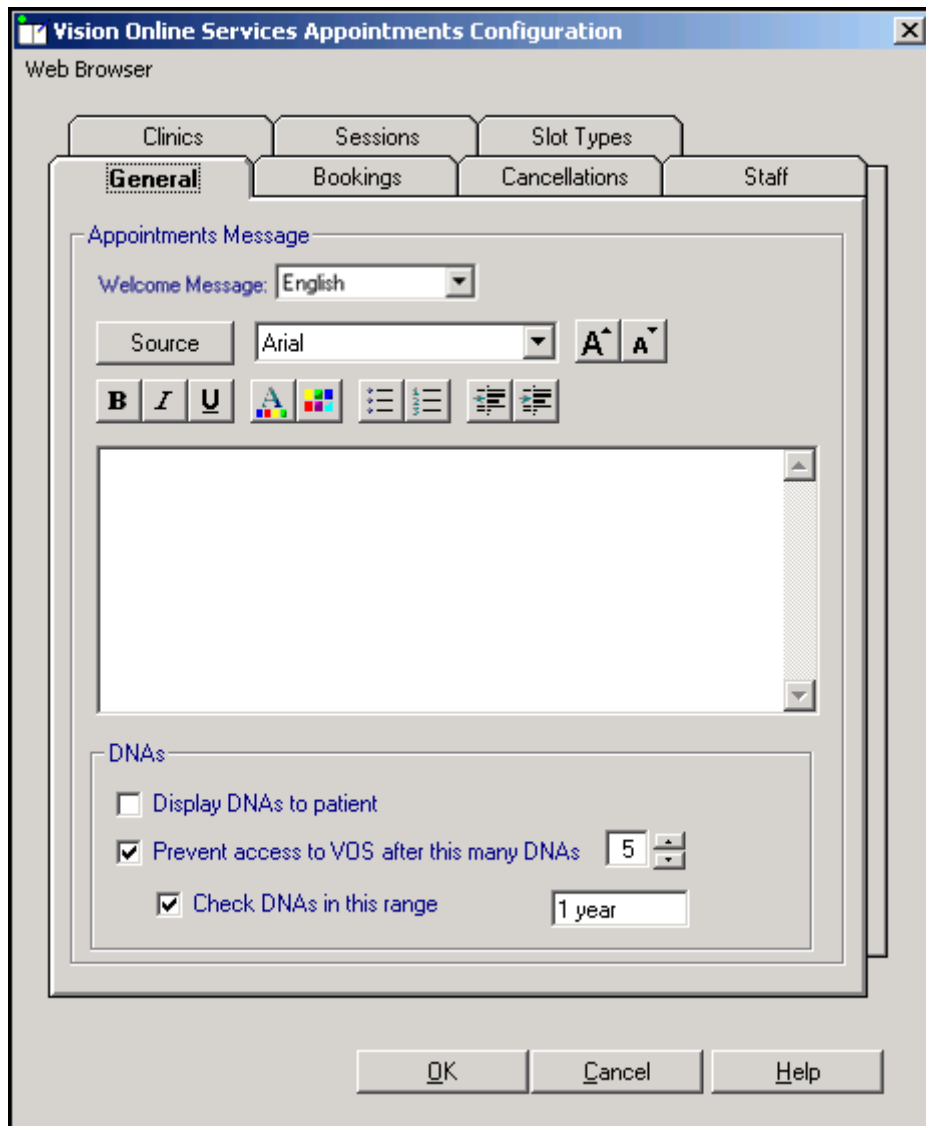
2. The **Vision Online Services** screen displays, tick **Appointments** to enable online appointments:



3. Now select **Configure** to customise how appointments works for your practice.



You need to determine which staff and sessions you want to be available from the **Patient Services** website and set up how you want online appointments to work for you. There are seven tabs that should be considered:



## General Tab

The **General** tab enables you to setup the following:

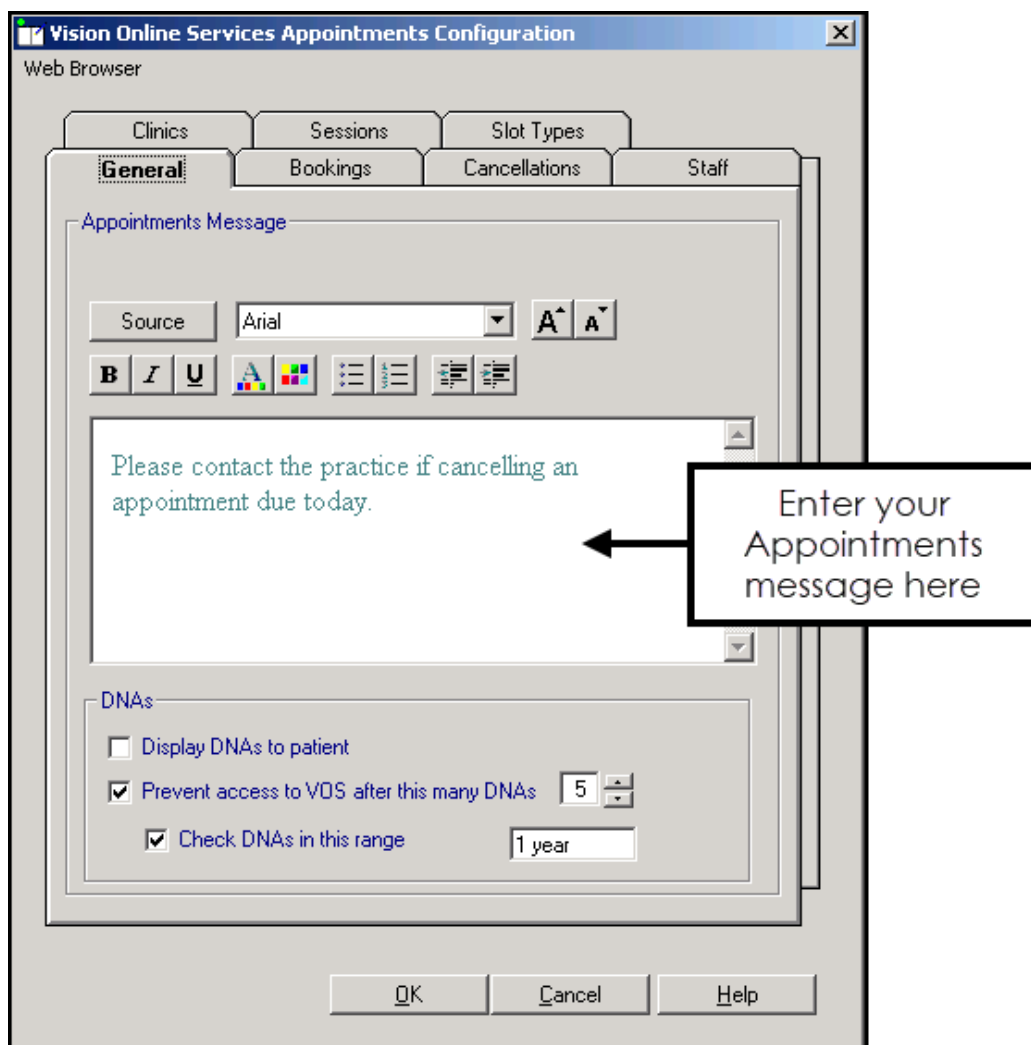
- **Welcome Message** (Wales only) - Select a language for this version, remember you should be adding both an English version and a Welsh version.
- **Appointments Message**, see [Add Appointment Message](#) on page 10.
- **Did Not Attend (DNA)**, see [Did Not Attends \(DNAs\)](#) on page 11.

## Add Appointment Message

The **Appointments Message** is a practice specific message that displays on the **Appointments** page of the website.


To add an **Appointment Message**:

1. From **Online Services Appointments Configuration** select the **General** tab.
2. Enter your message in the **Appointments Message** window using the formatting editor provided. If you prefer, you can customise your message source using HTML formatting tags, see [Formatting HTML Messages](#) on page 45:



3. Select **OK** to save.

---

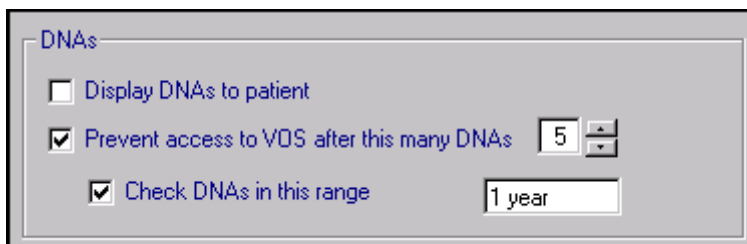
 **Note** - To help prevent confusion surrounding who to contact if your patients have a problem, we ask that you add the following to your **Appointment Message** 'In the case of a query regarding booking or cancelling an appointment please contact the surgery in the usual way'.

---

## Did Not Attends (DNAs)

You can manage DNAs within online appointments, from **Online Services Appointments Configuration**, select **General - DNAs** and then select from:

- **Display DNAs to patient** - Tick to enable patients to view their DNA appointments.
- **Prevent access to Online Services after this many DNAs** - Tick to limit patient access after a set amount of DNAs (removing the tick disables this function) and enter a number of DNAs permitted before the user account is disabled.
- **Check DNAs in this range** - Tick to specify a date range for the DNA's if required and set the date range:



DNAs

Display DNAs to patient

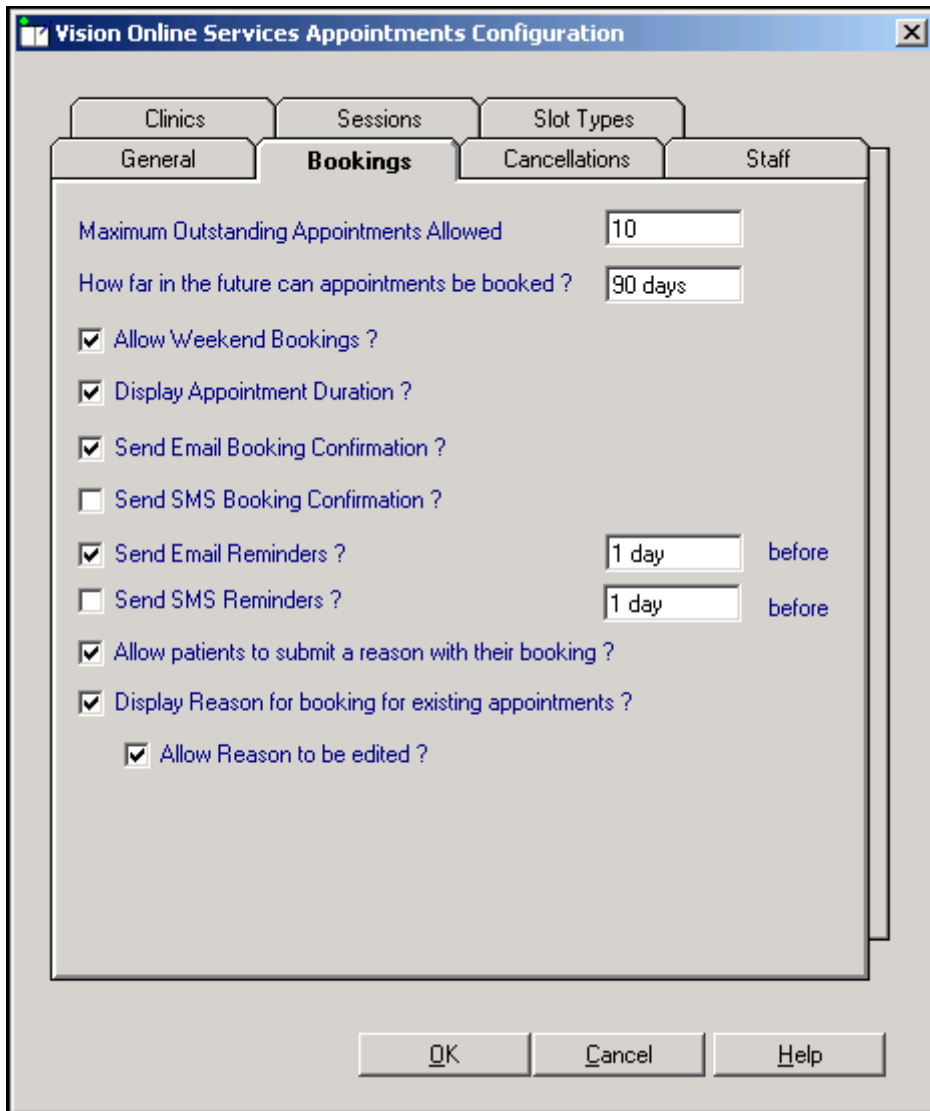
Prevent access to VOS after this many DNAs 5

Check DNAs in this range 1 year

Should a patient exceed the number of DNA's you have set here, the next time they log into their **Patient Online Services** account, there are no links to **Appointments** and they have to contact the surgery direct to arrange an appointment.

## Bookings Tab

The **Bookings** tab allows you to configure existing and new online appointment bookings:



The screenshot shows the 'Vision Online Services Appointments Configuration' dialog box with the 'Bookings' tab selected. The 'Bookings' tab is highlighted in bold. The configuration options are as follows:

- Maximum Outstanding Appointments Allowed: 10
- How far in the future can appointments be booked?: 90 days
- Allow Weekend Bookings ?
- Display Appointment Duration ?
- Send Email Booking Confirmation ?
- Send SMS Booking Confirmation ?
- Send Email Reminders ? 1 day before
- Send SMS Reminders ? 1 day before
- Allow patients to submit a reason with their booking ?
- Display Reason for booking for existing appointments ?
  - Allow Reason to be edited ?

Buttons at the bottom: OK, Cancel, Help.

Complete as required:

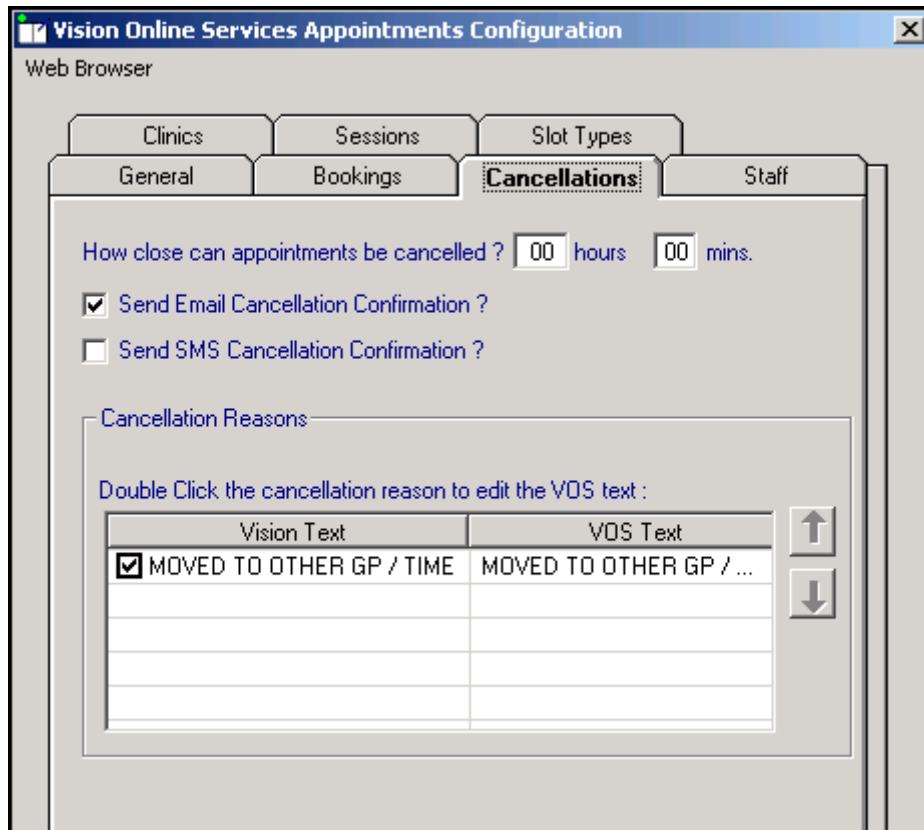
- Maximum Outstanding Appointments Allowed** - You must decide how many outstanding appointments a patient can have booked at any one time. Enter the number of appointments you want to allow. The default is 0 which enables your patients to book unlimited appointments. If the patient reaches the limit (by either online or practice booked appointments), the patient receives a message which states 'You have reached the maximum number of bookings allowed. No further bookings can be made at this time.'.
- How far in the future can appointments be booked** - You must decide how far in advance your patients can book an online appointment. Enter the number required, followed by **D** (days), **W** (weeks), **M** (months), or **Y** (years), for example, 3W allows the patient to book online appointments up to three weeks in the future.

- **Allow Weekend Bookings?** - If you provide weekend appointments, tick to enable weekend appointments to be available online.
- **Display Appointment Duration?** - Tick to display the duration of the appointment being booked to the patient.
- **Send Email Booking Confirmation?** - Tick to email active online registered patients confirmation of their appointments booked online or in the practice.
- **Send SMS Booking Confirmation?** - SMS Messaging is no longer a free option via NHS.net, therefore this option is disabled.
- **Send Email Reminders?** - Tick and then specify how long before the appointment time the patient is to be reminded by email.
- **Send SMS Reminders?** - SMS Messaging is no longer a free option via NHS.net, therefore the option is disabled.
- **Allow patients to submit a reason with their booking?** - Tick to allow your patient to add a comment when booking appointments.
- **Display Reason for booking for existing appointments?** - Tick to enable your patients to view the booking reasons for existing appointments booked at the practice.
- **Allow Reason to be edited?** - Tick to allow patients to edit the reason for booking.

## Cancellations Tab

From the **Cancellations** tab you can:

- Set a time period for cancelling appointments.
- Determine if email confirmation messages are sent.
- Set cancellation reasons, see **Cancellation Reasons** on page 15:



The screenshot shows the 'Cancellations' configuration window. It includes a 'Web Browser' header and tabs for 'Clinics', 'Sessions', 'Slot Types', 'General', 'Bookings', 'Cancellations', and 'Staff'. The 'Cancellations' tab is active. It features a time selection for 'How close can appointments be cancelled?' set to 00 hours and 00 mins. There are checkboxes for 'Send Email Cancellation Confirmation?' (checked) and 'Send SMS Cancellation Confirmation?' (unchecked). Below is a 'Cancellation Reasons' section with a table and a 'Double Click the cancellation reason to edit the VOS text' instruction.

Vision Text	VOS Text
<input checked="" type="checkbox"/> MOVED TO OTHER GP / TIME	MOVED TO OTHER GP / ...

Complete as required:

- **How close can appointments be cancelled?** - To set the cancellation time frame, enter a number of hours and minutes as required. If your patient attempts to cancel an appointment during the cancellation cut-off period they are advised '*This appointment cannot be cancelled online. Please contact your GP Practice*'.

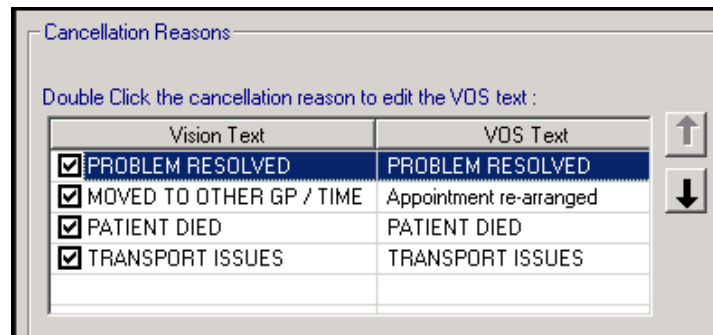
Enable Cancellation Confirmation if you want the patient to receive email confirmation when an appointment is cancelled:

- **Send Email Cancellation Confirmation?** - Tick to send an email if an appointment is cancelled either at the practice or online.
- **SMS Cancellation Confirmation?** - SMS Messaging is no longer a free option via NHS.net, therefore this option is disabled.

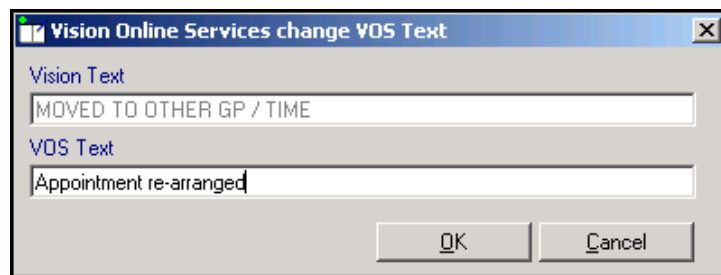
## Cancellation Reasons

To manage the **Cancellation Reasons**:

1. From **Vision Online Services Appointments Configuration** select the **Cancellations** tab:



2. Double click the cancellation reason to edit and the **Vision Online Services change VOS Text** screen displays:



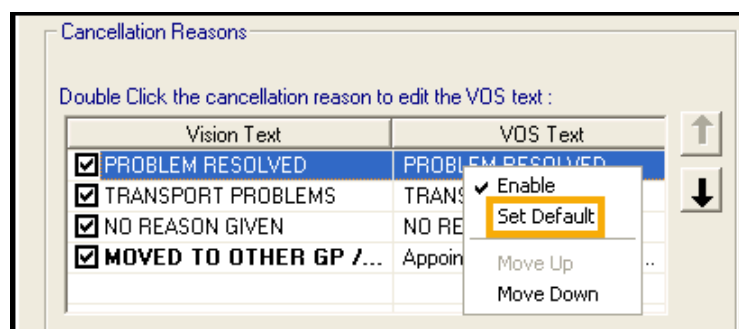
3. Enter the text you require and select **OK**.
4. Change the order the cancellation reasons display in by using the up and down arrows. Highlight the reason you wish to move and use the arrows to move it to the required position in the list. To hide a cancellation reason from your patients, remove the tick that precedes it.

---

**i Important** - If all cancellation reasons are deselected (hidden) patients are unable to cancel appointments online.

---

5. To set one of the cancellation reasons as a default, highlight the required reason, right click and select **Set Default**. The default displays in bold:



## Staff Tab

The **Staff** tab allows you to decide which clinical staff display in online appointments and are available for your patients to book.


To set up your staff:

1. From the **Vision Online Services Appointments Configuration** screen, select the **Staff** tab.
2. The following options are available however we recommend you do not use them as they do not allow the correct mix of staff:



- **All Staff** - Displays all active clinical staff listed in **File Maintenance** (including admin staff with a clinical role).

---

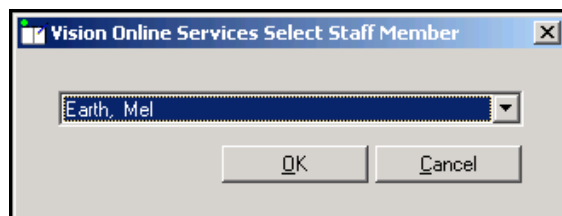
 **Note** - This can lead to a very long list of clinicians being offered to your patients.

---

- **Usual GP** - Displays only the patient's Usual GP.
- **Salaried GP** - Displays only those GPs set as **Salaried GPs** in **File Maintenance**.


To setup staff individually (Recommended):

1. From the **Vision Online Services Appointments Configuration** screen, remove the tick from **All Staff**.
2. Select **Add** and a list of all clinical staff from the **File Maintenance** list displays.
3. Select the required clinician's name from the list and select **OK**:



4. Repeat steps 2 - 3 until you have added all the staff required.
5. Select **Cancel** to finish.

---

 **Note** - Staff need to be set up as normal in **Control Panel - File Maintenance** and **Appointments** for you to be able to add into the **Online Services Staff** tab.

---

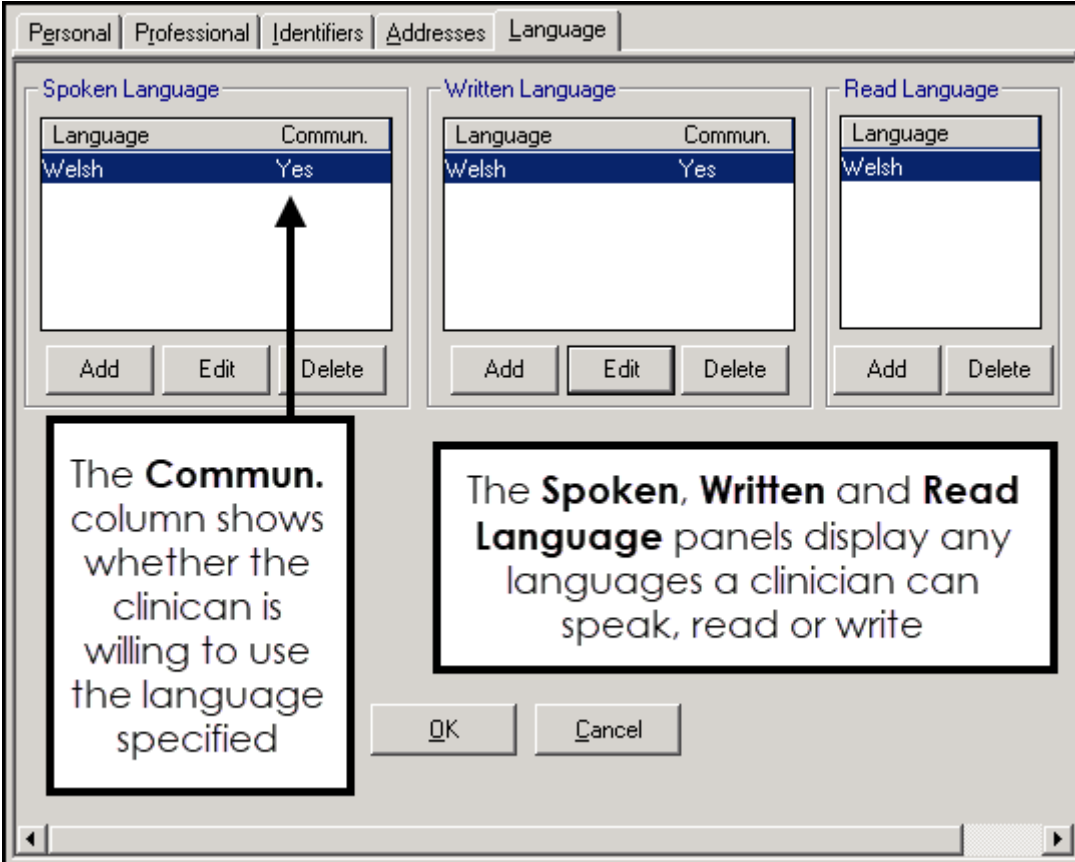


## Adding Gender, Special Interests & Language

**Gender, Role, Special Clinical Interests, Written** and **Spoken Languages** of any clinician providing online appointments displays online. For each clinician selected for online appointments the following should be completed:



1. From **Vision 3 - Control Panel** - **File Maintenance - Staff** select the staff member, right click and select **Edit Staff**.
2. Complete each tab as follows:



The **Commun.** column shows whether the clinician is willing to use the language specified

The **Spoken, Written and Read Language** panels display any languages a clinician can speak, read or write

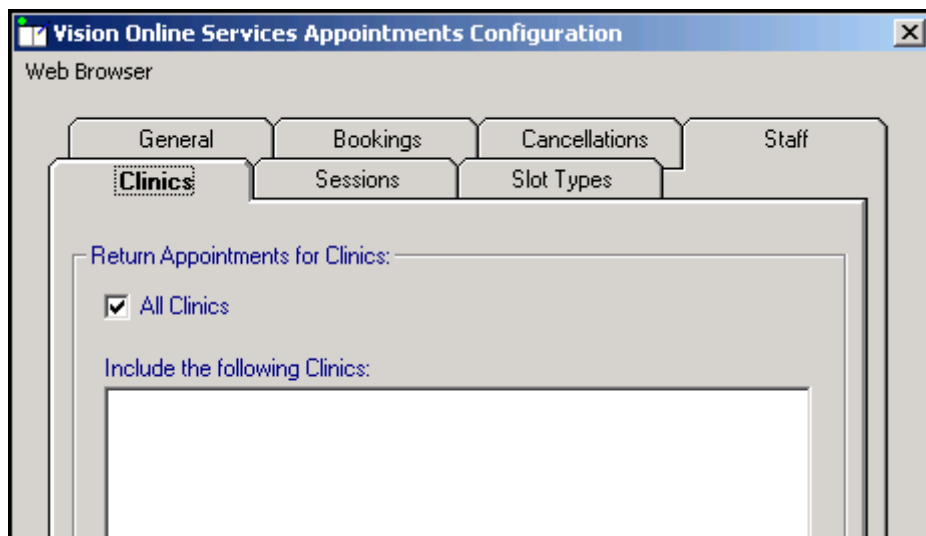
- **Personal** - Select **Sex** and then select the correct gender.
  - **Professional:**
    - Check the **Role** selected is correct.
    - Set the **Main** and **Interest Specialty** from the available lists.
  - **Language** - Check the **Spoken, Written** and **Read** languages options are complete and correct where added:
    - To add a language if required, select **Add** under the correct section (**Spoken, Written** or **Read**), select from the available list and select **OK**.
3. Select **OK** to save.

## Clinics Tab

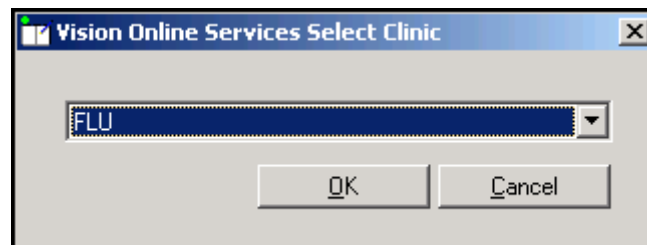
The **Clinics** tab enables you to determine which clinics (ad-hoc sessions that are not linked to a specific clinician) are available to your patients online.

To add clinics:

1. From the **Vision Online Services Appointments Configuration** screen, select the **Clinics** tab.
2. **All Clinics** is ticked by default, to change this to specific clinics, remove the tick:



3. Select **Add** and the **Vision Online Services Select Clinic** screen displays:



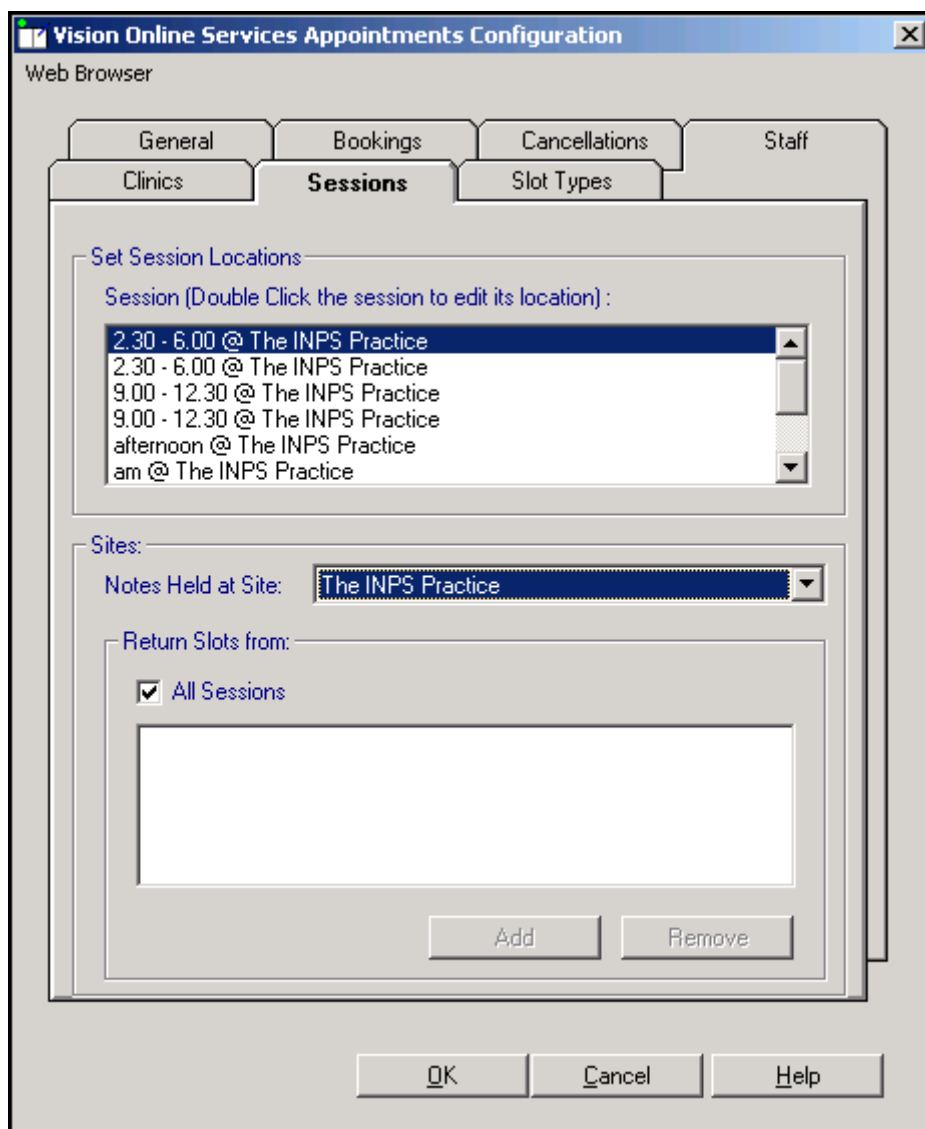
4. Select the required clinic from the list and select **OK**.
5. Repeat step 3 and 4 until you have added all the clinics you require.
6. If you have selected all the clinics in the list you are prompted 'All available clinics have been added to the list.', select **OK** to continue.

To remove a clinic from the list:

1. From **Vision Online Services Appointments Configuration** screen, select the **Clinics** tab.
2. Highlight the clinic to remove.
3. Select **Remove**.
4. You are prompted 'Are you sure that you want to remove (name of clinic) from the list?', select **Yes** to remove.

## Sessions Tab

The **Sessions** tab allows you to configure site access and locations for sessions available within online appointments:



The screenshot shows the 'Vision Online Services Appointments Configuration' dialog box with the 'Sessions' tab selected. The dialog has a title bar with a close button and a 'Web Browser' label. Below the title bar are four tabs: 'General', 'Bookings', 'Cancellations', and 'Staff'. Underneath these are three sub-tabs: 'Clinics', 'Sessions' (which is active), and 'Slot Types'. The main content area is divided into two sections. The first section, 'Set Session Locations', contains a list of session entries with a double-click instruction. The second section, 'Sites', includes a dropdown menu for 'Notes Held at Site' and a 'Return Slots from:' section with a checked checkbox for 'All Sessions'. At the bottom of the dialog are 'Add' and 'Remove' buttons, and at the very bottom are 'OK', 'Cancel', and 'Help' buttons.

---

 **Note** - Slots are not available online until they are marked as **Reserved for Web (Vision 3 Appointments)** or **Available for web (Appointments)**.

---

## Setting Sessions, Locations and Sites:

To set session locations and sites:

1. From **Online Services Appointments Configuration** screen, select the **Sessions** tab.
2. Complete as required:
  - **Set Session Locations:**
    - **Session** - Lists all sessions added or created in **Appointments**. Double click on a session to display the list of available locations, select the location you require and select **OK**.
  - **Sites** - Specifies which sessions should be included for each location. This enables you to limit which sessions are included online:
    - **Notes Held at Site** - Select the site required and then either leave the tick in **All Sessions** or remove the tick and select **Add** to select the specific sessions required and repeat as necessary. Select **Cancel** to finish. If you have branch surgery(s) change **Notes Held at Site** to the alternative location and add sessions in the same way.



See [Setting Up Appointment Sessions for Branch Surgeries](#) on page 37 for further details.

---

### Removing a Session from the list:

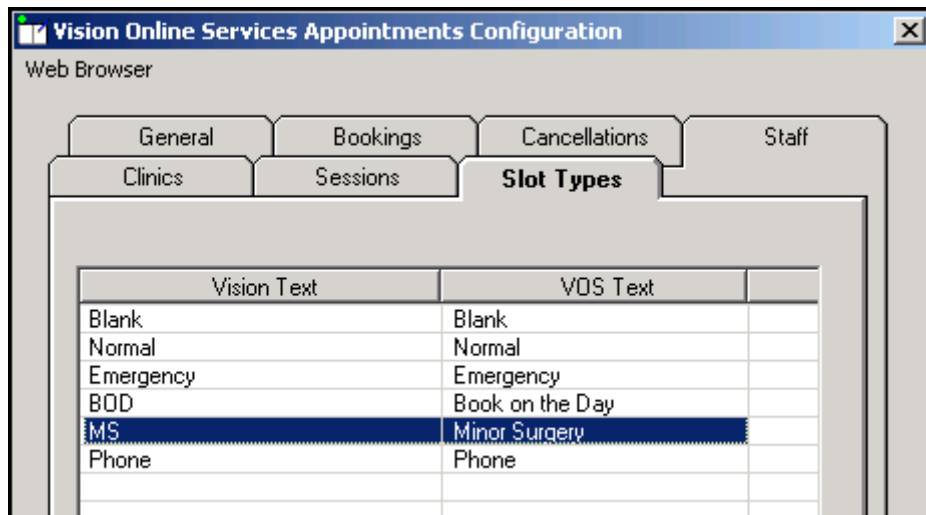
1. Highlight the required session and then select **Remove**.
2. You are prompted '*Are you sure that you want to remove (name of session) from the list?*', select **Yes** to remove.

## Slot Types Tab

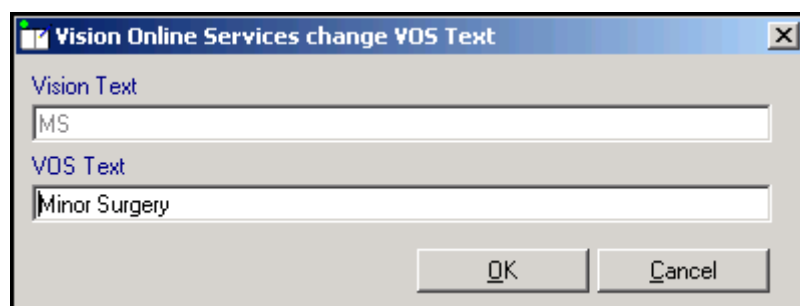
The slot type displays when your patients are booking appointments online. Text used on slot types by staff should be changed to something appropriate for patients, for example 'MS' should be changed to 'Minor Surgery'.

To change the slot type text that displays:

1. From **Vision Online Services Appointments Configuration** select the **Slot Types** tab:



2. Double click the slot type to update and the **Vision Online Services change VOS Text** screen displays:



3. In **VOS Text**, enter the text you want to display and select **OK** to save.
4. Repeat steps 2 - 3 until all the slot types have **VOS text** listed.

Once you have considered and completed all seven tabs as required, select **OK** to save and close the **Vision Online Services Appointments Configuration** screen.



**Remember** - You need to update **Appointments Configuration** when a clinician joins or leaves your practice.

You must now configure online appointments from **Appointments**.

## Creating Online Appointment Slots

Once you have enabled and configured online **Appointments** from **Control Panel** you must decide how much of your appointment book you want your patients to have access to online. You need to consider:



### Vision 3 Appointments

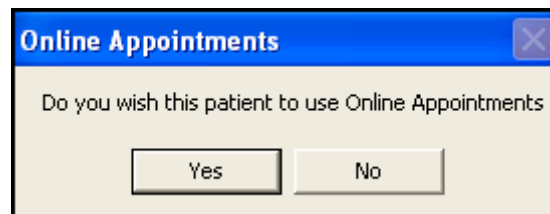
#### Prompting patients about online services

You can turn on a prompt to remind you to register a patient for online services.

To turn on the prompt:

1. From **Vision 3 Appointments - Maintenance - System Constants - Bookings**, tick **Prompt to register patient for online booking**.
2. Select **OK** to save and close.

Once selected, each time you select a patient in **Appointments** who is not registered for online booking, you are prompted 'Do you wish this patient to use Online Appointments':



Select either:

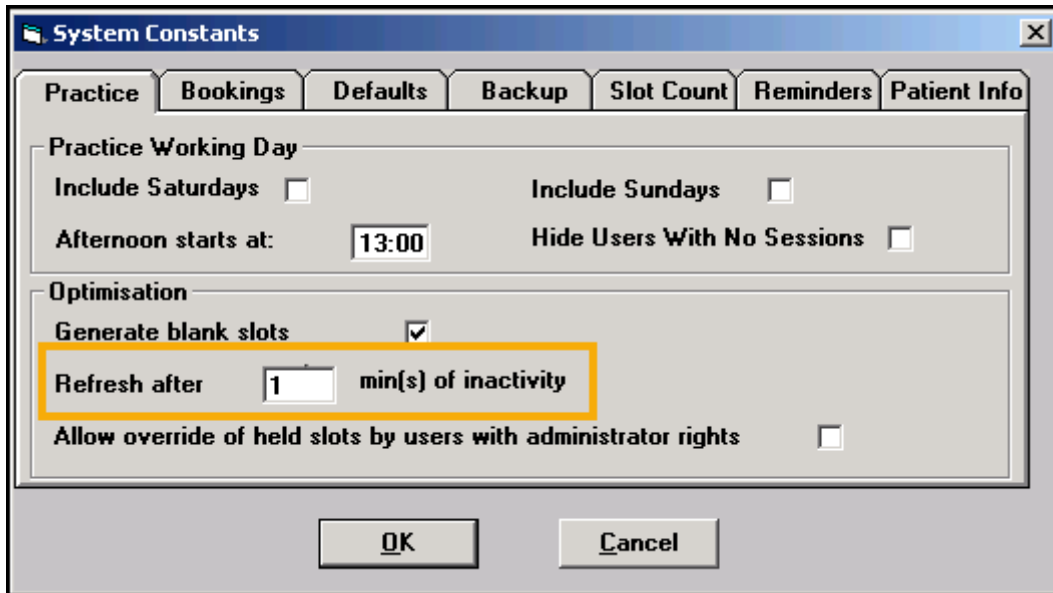
- **Yes** - The patient's **Registration Details** screen opens in the background. Complete the appointment booking then select their registration and register the patient for **Online Appointments**. See **Creating a Patient Online Account** on page 41 for details.
- **No** - Results in no further action. You are prompted to register the patient for online services the next time you select this patient.

## Appointment Refresh Rate

**Vision 3 Appointments** automatically refreshes to show appointments booked at other sites and via online services.

To set the refresh rate:


1. From **Vision 3 Appointments - Maintenance - System Constants** select the **Practice** tab.
2. Check **Refresh after** and update the number of minutes if required:



The screenshot shows the 'System Constants' dialog box with the 'Practice' tab selected. The 'Optimisation' section is expanded, and the 'Refresh after' field is highlighted with a yellow box. The value '1' is entered in the field, followed by 'min(s) of inactivity'. Other options include 'Generate blank slots' (checked), 'Include Saturdays' (unchecked), 'Include Sundays' (unchecked), 'Afternoon starts at: 13:00', 'Hide Users With No Sessions' (unchecked), and 'Allow override of held slots by users with administrator rights' (unchecked). 'OK' and 'Cancel' buttons are at the bottom.

3. Select **OK** to save and close.

---

 **Note** - If your screen does not refresh regularly, you may find that when selecting a slot to book, the slot displays as free on your screen, however, if it has been booked at a branch or online, you cannot proceed with the booking.

---

## Setting up Session Types

Session Headers and location display in online services for the patient, so it is useful to keep them to a minimum, for example 'AM Surgery', 'PM Surgery'. These session headers can then be used to setup numerous individual sessions for the clinicians. To create and maintain Session Types:

1. From **Vision 3 Appointments**, select **Plan - Session Type**:



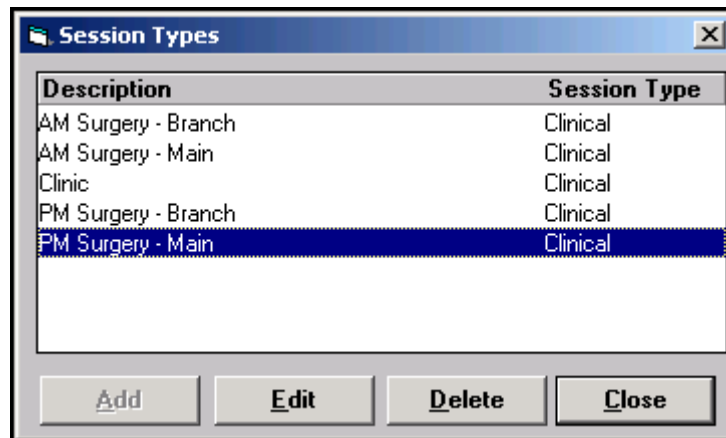
If you are, or have, a branch surgery, it is recommended that you have session headers for each site. For example, 'AM Surgery - Main Site', 'AM Surgery - Branch Site'. To help identify site locations for your patients consider replacing Main or Branch with the actual name.

2. To add a new session, select **Add**, type your description in the description window and select **OK**. To add further sessions select **Add** and repeat this process until you have added all the required sessions.

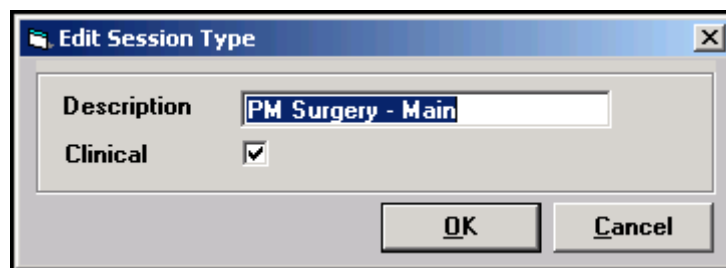


To edit an existing session

1. Highlight the session in the **Session Types** screen and select **Edit**:




2. Change the text in **Description** as required, select **OK** to save and close:



To delete a session

1. Highlight the session you want to remove on the **Session Types** screen and select **Delete**.
2. You are prompted '*Are you sure you want to delete the selected session types*', select **Yes** to confirm deletion, or select **No** to cancel the deletion.

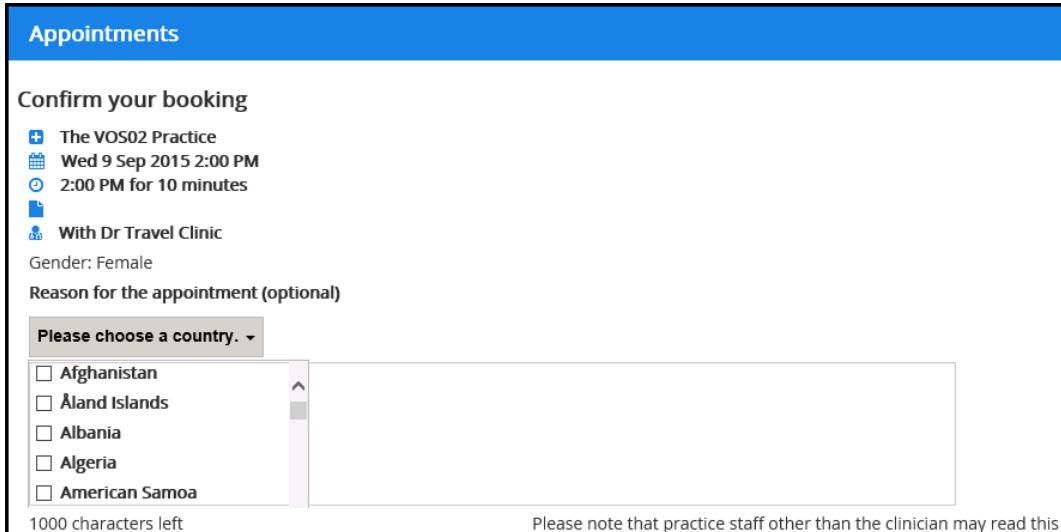
---

 **Note** - If the session is in use, you are prompted '*Session Type is being used in a Weekly Plan. You cannot delete this item.*' You need to edit the Weekly Plan to enable the deletion of the session type.

---

## Travel Clinics

Sessions can be defined as travel clinics. This enables the patient to select a country from a list, which is then added to the appointments comments and can be viewed in **Consultation Manager** and **Appointments**:



**Appointments**

Confirm your booking

- The VOS02 Practice
- Wed 9 Sep 2015 2:00 PM
- 2:00 PM for 10 minutes
- With Dr Travel Clinic

Gender: Female

Reason for the appointment (optional)

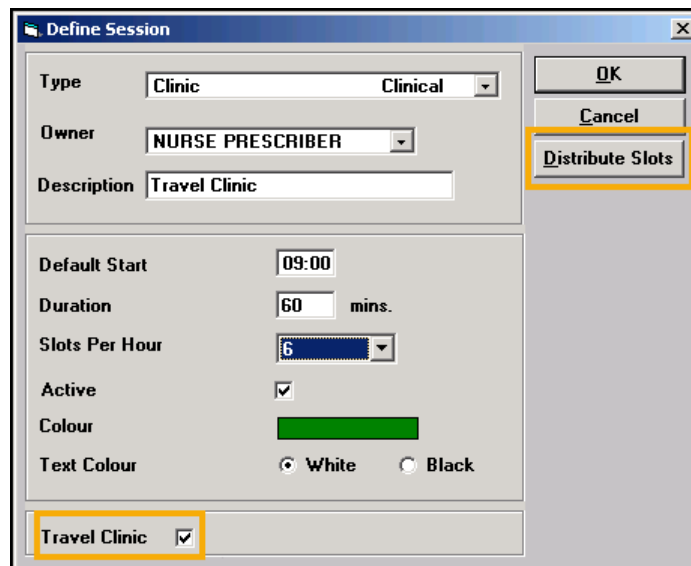
Please choose a country. ▾

- Afghanistan
- Åland Islands
- Albania
- Algeria
- American Samoa

1000 characters left Please note that practice staff other than the clinician may read this

To create a **Travel Clinic** session:

1. From **Vision 3 Appointments** select **Plan - New Session** to create a new session, or **Edit Session** to change an existing session.
2. Check the existing details or add new details as required.
3. Tick **Travel Clinic**:



**Define Session**

Type: Clinic Clinical ▾

Owner: NURSE PRESCRIBER ▾

Description: Travel Clinic

Default Start: 09:00

Duration: 60 mins

Slots Per Hour: 6 ▾

Active:

Colour:

Text Colour:  White  Black

Travel Clinic

OK

Cancel

Distribute Slots

4. Select **Distribute Slots** and change the slots to a **Web Default travel clinic** slot type.
5. Select **OK**.
6. Select **OK** to save and close the session.

The session is now a **Travel Clinic** and can be added to the appointment books as required.

## Configuring Slot Types and Reserving Slots for Web Use

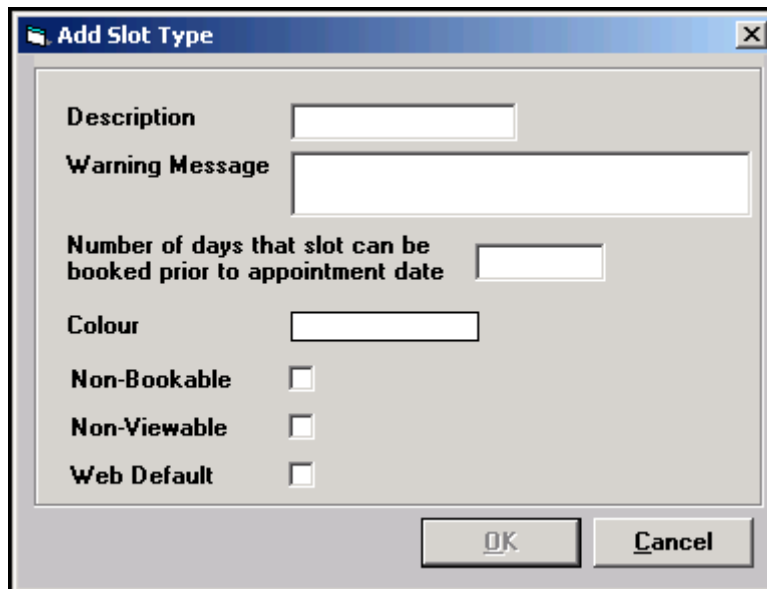
Appointments booked by your patient online must be reserved by being marked **Reserved for Web**. You can do this either manually or automatically.

When creating or editing **Slot Types** the following options are available:

### Non-Bookable Slots

Non-Bookable Slots are a slot type which cannot be booked. Non-bookable slots cannot be viewed or booked from **Vision 3** or online:

1. From **Vision 3 Appointments**, select **Plan - Slot Type**.
2. Select an existing slot type and select **Edit**, or **Add** to create a new slot type.
3. Tick **Non-Bookable**:



The screenshot shows a dialog box titled "Add Slot Type" with the following fields and options:

- Description: [Text Box]
- Warning Message: [Text Area]
- Number of days that slot can be booked prior to appointment date: [Text Box]
- Colour: [Text Box]
- Non-Bookable:
- Non-Viewable:
- Web Default:

Buttons: OK, Cancel

## Non-Viewable Slots

Non-viewable slots can be viewed from **Appointments, Consultation Manager, Mail Manager**, and 3rd party applications. These slots do not display online for patients to book, however when booked at the practice, confirmation emails are sent to patients registered for online services.

---

**i Important** - If appointments are used for messages or tasks about a patient, for example, 'Home Visit, message from patient', and the patient is registered with Patient Services, an appointment reminder email is sent to the patient even if the slot type is non-viewable.

---

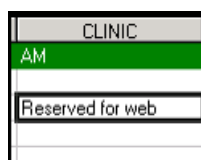
**💡 Training Tip** - For internal messaging or tasks, practices should consider using **Daybook/Tasks** which is specifically designed to create, track and complete administrative tasks.

---

1. From **Vision 3 Appointments**, select **Plan - Slot Type**.
2. Select an existing slot type and select **Edit**, or **Add** to create a new slot type.
3. Create a **Slot Type** as usual adding a description, warning message and colour as per practice protocol.
4. Select **Non - viewable**.
5. Select **OK**.

## Web Default/Bookings

Defining a slot as Web Default/booking automatically reserves the slot(s) for web use when added to a session. Each time a session is extended that contains Web Default/bookings slots, they are automatically created and marked **Reserve for Web**. You can also book Web Default/bookings slots from within **Appointments**:



1. From **Vision 3 Appointments**, select **Plan - Slot Type**.
2. Select an existing slot type and select either **Edit** or **Add** to create a new slot type.
3. Create **Slot Type** as usual adding in description, warning message and colour as per practice protocol.
4. Select **Web Default**.
5. Finally, select **OK**.

## Reserving Slots

For slots to be available online they must first be reserved in **Vision 3 Appointments**. Only slots marked **Reserved for Web** are available for patients to book online.

You can define slots for web booking:

- Automatically when adding/editing sessions. See [Reserve for Web - Automatic](#) on page 29 for details.
- Manually each time the appointment books are extended or modified. See [Reserve for Web - Manual](#) on page 30 for details.

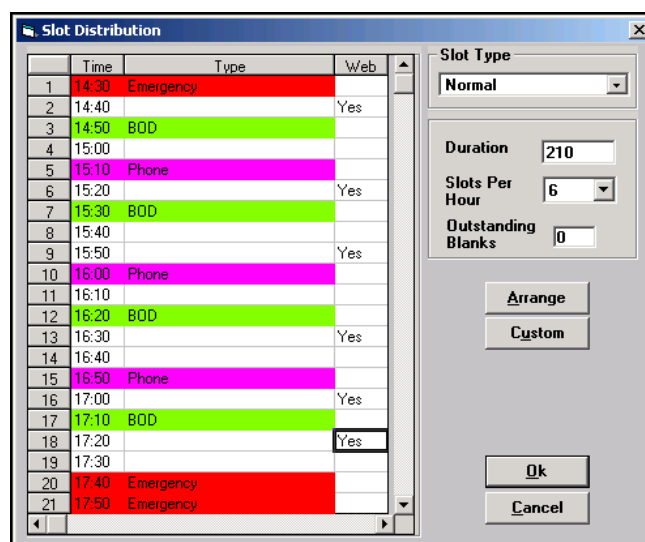


**Note - Reserved for Web** slots also require Staff and Session setup in Online Services before they are available to patients.

### Reserve for Web - Automatic

**Reserved for Web slots** can be automatically created in the following ways:

1. From **Vision 3 Appointments**, select **Plan - New Session** or edit an existing session and select **Distribute Slots**.
2. Select a slot that has **Web Default** ticked for distribution in the session, **Yes** displays in the web column.
3. Select **OK**.
4. Select **OK** again:



**Note** - When you next run **Extend Books**, the **Reserved for Web** slots that have been set as default appear online and in the **Vision 3** Appointment book.

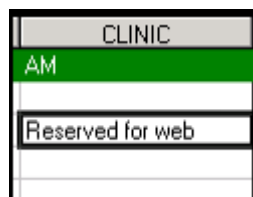
## Reserve for Web - Manual

Reserving Slots manually can be done for:

- Individual appointments
- Multiple appointments
- Recurrent appointments

From **Vision 3 Appointments**, to reserve individual appointments for use by online appointments:

1. Open a view and highlight the required slot.
2. Right click and select **Reserve for Web**.
3. The selected slot now displays as **Reserved for web**:



---

 **Note** - To release the reserved slots, right click on the slot and select **Reclaim from Web**.

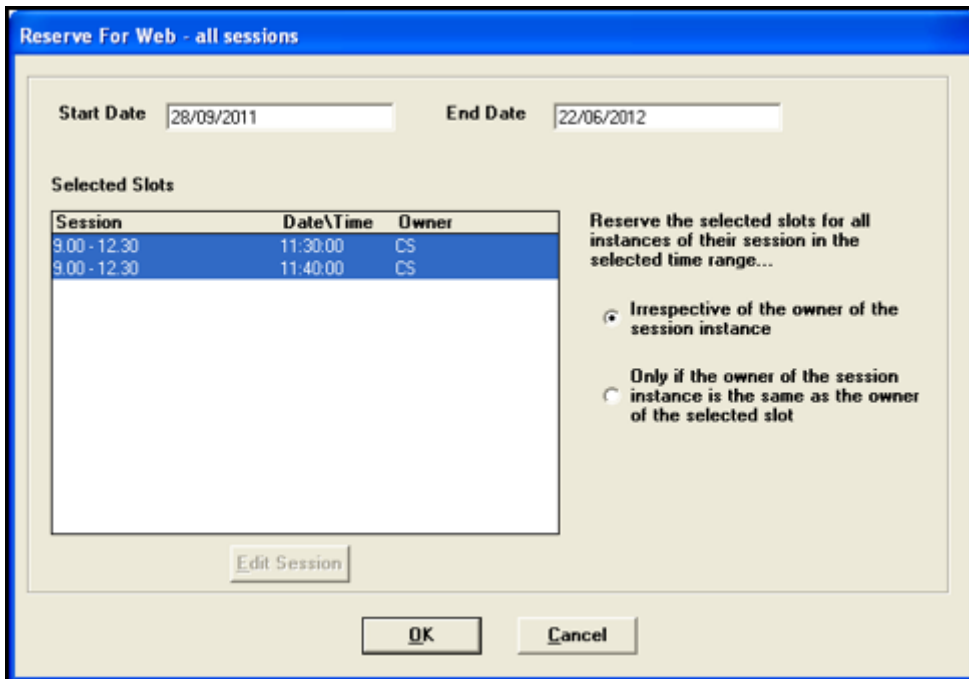
---

From **Vision 3 Appointments**, to reserve multiple appointments for use by online appointments:

1. Open a view and find the slots required.
2. Highlight the required slots by holding the **Ctrl** key on the keyboard, then selecting each slot required.
3. Right click and select **Reserve for Web**.
4. The selected slots now display as **Reserved for web**.

From **Vision 3 Appointments**, to reserve recurrent appointments for use by online appointments, for example, 11:00 appointment slot and all future matching 11:00 slots with matching session type and book owner, within a specified time frame:

1. Open a view and find the slot(s) to reserve, highlight the required slot(s).
2. Right click and select **Reserve for Web - All Sessions**.
3. The **Reserve For Web - all sessions** screen displays. Enter a **Start** and **End** date (double click to access the calendar) to specify when the slots are to be reserved.
4. You are prompted to 'Reserve the selected slots for all instances of their session in the selected time range'. Select either:
  - **Irrespective of the owner of the session instance**
  - **Only if the owner of the session instance is the same as the owner of the selected slot:**



Reserve For Web - all sessions

Start Date: 28/09/2011      End Date: 22/06/2012

Selected Slots

Session	Date\Time	Owner
9.00 - 12.30	11:30:00	CS
9.00 - 12.30	11:40:00	CS

Reserve the selected slots for all instances of their session in the selected time range...


Irrespective of the owner of the session instance  
 Only if the owner of the session instance is the same as the owner of the selected slot

Edit Session

OK      Cancel

6. Each current slot that matches the selection is now reserved for use for online appointments. When extending appointment books, slots are reserved for the time period specified. The selected slots display as **Reserved for Web**.
7. To release the reserved slots, right click on one of the affected slots and select **Reclaim from Web - All Sessions**.

---

 **Important** - You need to repeat this process when the time period expires to reserve new extended slots.

---

## Appointments and Appointments Setup

### Configuring Slot Types for Web Use

Appointments booked by your patient online must be reserved by being marked **Available for Web**. You can do this either manually or automatically.

Defining a slot as **Web Default** automatically allocates the slot(s) for use with online services. Each time your appointment books are extended the slots are automatically created and marked **Reserve for Web**. These slots can also be booked as normal in the practice.

### Manually Defining a Slot as Available Online

To manually set a slot as **Reserved for Web**:

1. From **Appointments**, select either the **Session** or **Day** view, right click on the appointment(s) required.

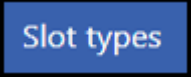


2. **nn items selected**  displays at the bottom of the screen confirming the number of items selected and the toolbar activates at the top of the screen.

3. Select **Enable web booking**  and the selected slot(s) update to **Available for Web**.




## Automatically Creating Slots Available Online

To automatically create **Web booking** slots:

1. From **Appointments Setup**, select **Slot types** .
2. Select either **Add slot type** , or select the slot to edit and select **Edit** .
3. Complete the **Slot Type** details in the usual way.
4. Tick **Web bookings**.
5. Select **Apply**.

---

 See the **Appointments Help Centre** ([https://help.cegedim-healthcare.co.uk/Appointments\\_new/content/home.htm](https://help.cegedim-healthcare.co.uk/Appointments_new/content/home.htm)) and the **Appointments Setup Help Centre** ([https://help.cegedim-healthcare.co.uk/Vision\\_Appointments\\_Setup/Content/Home.htm](https://help.cegedim-healthcare.co.uk/Vision_Appointments_Setup/Content/Home.htm)) for further details.


---

## Online Appointment Reports

To help manage online appointments, the following reporting tools are available from **Vision 3 Appointments**:

- **Online Appointments Report** - Enables you to analyse online appointment usage by patients, looking at slots available, booked or cancelled, or search for **Reserved for Web** slots. See [Online Appointment Report](#) on page 34 for further details.
- **Did Not Attend (DNA) Report** - This report indicates whether the appointment was booked online. See [Did Not Attend \(DNA\) Report](#) on page 36 for further details.

---

 **Note** – If you use **Appointments**, reports can be run from the **Appointments Report** app. Contact your Account Manager for details.

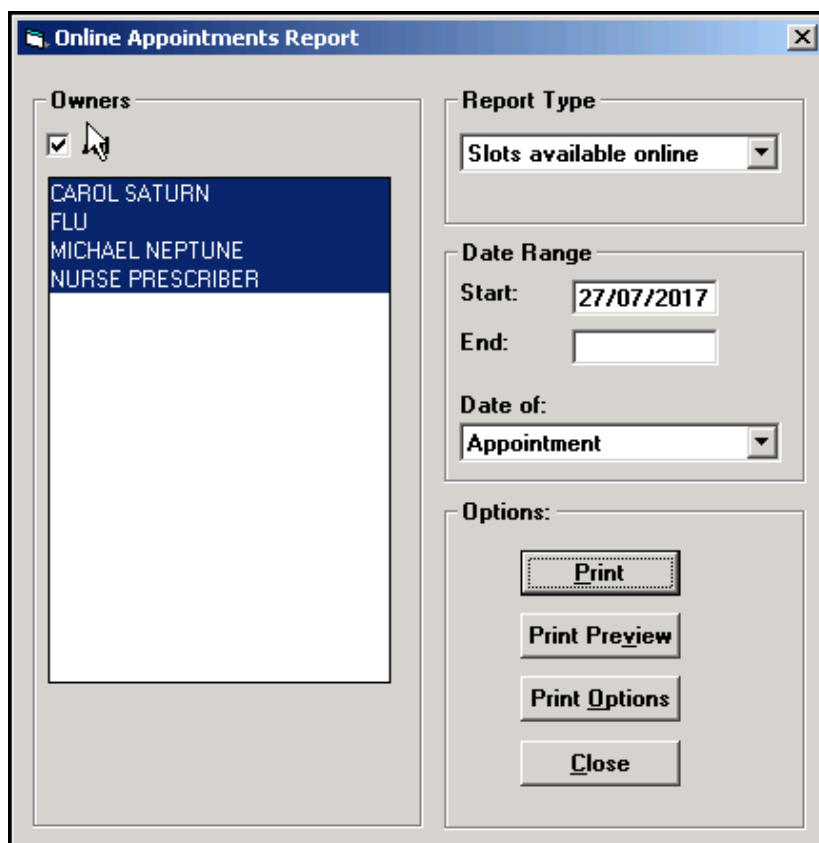
---

## Online Appointment Report

The **Online Appointments Report** enables you to analyse the availability, booking and use of online appointments.

To create an **Online Appointments Report**:

1. From **Vision 3 Appointments**, select **Search - Online Appointments Report**.
2. The **Online Appointments Report** screen displays:




The screenshot shows the 'Online Appointments Report' application window. It features a list of owners on the left, a 'Report Type' dropdown set to 'Slots available online', a 'Date Range' section with 'Start' set to '27/07/2017' and an empty 'End' field, a 'Date of:' dropdown set to 'Appointment', and an 'Options' section with buttons for 'Print', 'Print Preview', 'Print Options', and 'Close'.

Owners	Report Type	Date Range	Date of:	Options
<input checked="" type="checkbox"/> CAROL SATURN FLU MICHAEL NEPTUNE NURSE PRESCRIBER	Slots available online	Start: 27/07/2017 End:	Appointment	Print Print Preview Print Options Close

Complete as required:

- **Report Type** - Select one of the following reports from the available list:
    - **Slot Available Online**
    - **Slots Booked Online**
    - **Slots Cancelled Online**
  - **Owners** - Select the required owners, or tick **All**.
  - **Date Range** - Select the date range you require, the default start date is today's date and the end date can be left blank.
  - **Date of** - Select a **Date of** option from the available list, the options are:
    - **Slots available online** - Date of Appointment only.
    - **Slots booked online** - Select date of Appointment, or date of Booking.
    - **Slots cancelled online** - Select date of Appointment, Booking or Cancellation.
3. Select **Print** to run and print the report.
  5. To view the report on screen, select **Print Preview**, this report can then be printed. To print, simply select **Print**.
  6. Select **Close** to finish.

---

 **Note** - The reason for the appointment or cancellation (if added) is included.

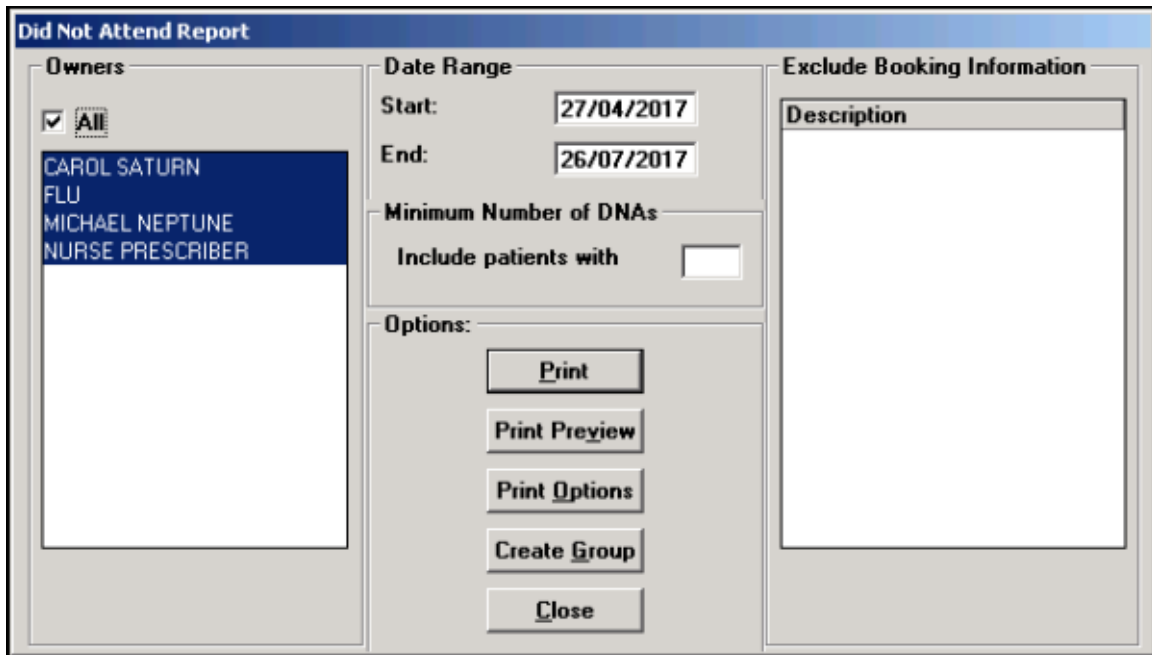
---

## Did Not Attend (DNA) Report

The DNA report displays all DNAs and identifies those that have been booked online.

To create a Did Not Attend Report:

1. From **Appointments**, select **Search - Did Not Attend Report**.
2. Select a date range, clinician(s) and exclude booking reasons if required:



**Did Not Attend Report**

**Owners**

All

CAROL SATURN  
FLU  
MICHAEL NEPTUNE  
NURSE PRESCRIBER

**Date Range**

Start: 27/04/2017  
End: 26/07/2017

**Minimum Number of DNAs**

Include patients with

**Options:**

Print  
Print Preview  
Print Options  
Create Group  
Close

**Exclude Booking Information**

Description

3. Click **Print Preview** to view the report prior to printing and then **Print** if required.

DNAs that have been booked online display with **(Online Booking)** printed below the appointment details.

## Setting Up Appointment Sessions for Branch Surgeries

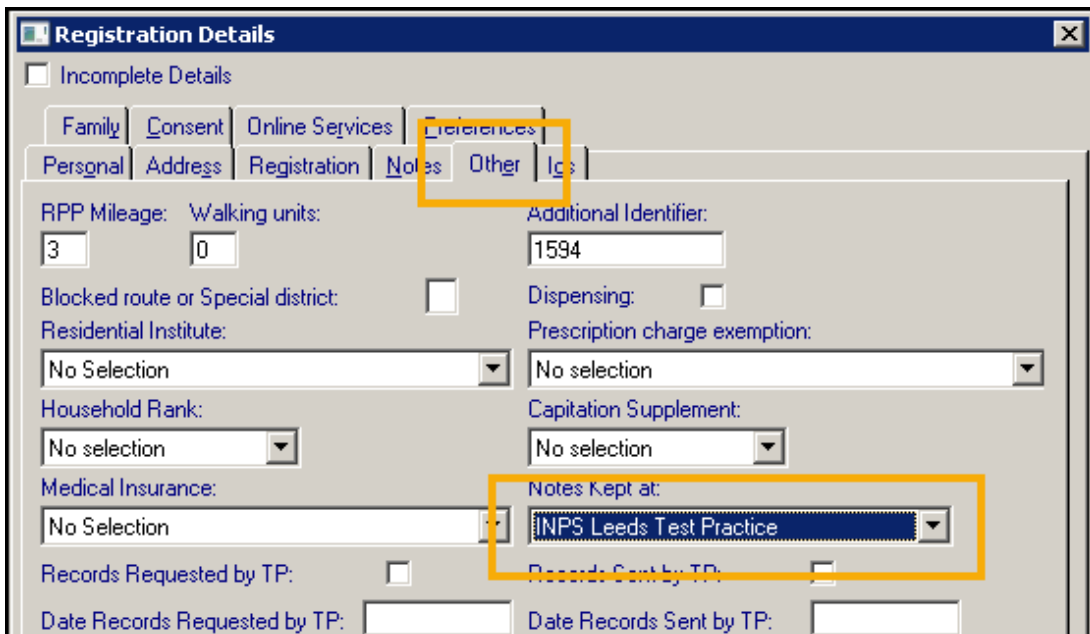
If you have multiple sites, you may want to offer your patients online slots that are available at their site only. In order to provide site specific appointments, you must complete the following steps:

### Step 1 - Patient Registration

For all patients you must:



1. From the **Vision 3** front screen, select **Registration** and select the patient's registration record in the usual way, see [Selecting a Patient](#) in the **Registration Help Centre** for details if required.
2. The **Registration Details** screen displays, select the **Other** tab:




The screenshot shows the 'Registration Details' window with the following fields and options:

- Incomplete Details:**
- Tabs:** Family, Consent, Online Services, Preferences, Personal, Address, Registration, Notes, Other, Ics. The 'Other' tab is highlighted.
- RPP Mileage:** 3
- Walking units:** 0
- Additional Identifier:** 1594
- Blocked route or Special district:**
- Dispensing:**
- Residential Institute:** No Selection
- Prescription charge exemption:** No selection
- Household Rank:** No selection
- Capitation Supplement:** No selection
- Medical Insurance:** No Selection
- Notes Kept at:** NPS Leeds Test Practice (highlighted)
- Records Requested by TP:**
- Records Sent by TP:**
- Date Records Requested by TP:** [ ]
- Date Records Sent by TP:** [ ]

3. Under **Notes Kept at**, select the appropriate site.


---

 **Note** - This site must have been set up in **Control Panel - File Maintenance - Practice**, see [Branch Surgery](#) in the **Management Tools Help Centre** for details.

---

4. Select **OK** to save.

---

 **Training Tip** - This should form part of your patient registration process if you have a branch surgery.

---

## Step 2 - Setting Session Location

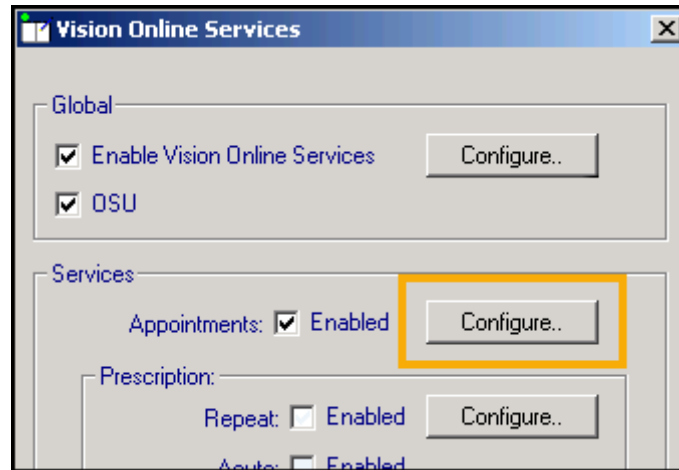
1. From the **Vision 3** front screen, select **Management Tool - Control Panel**



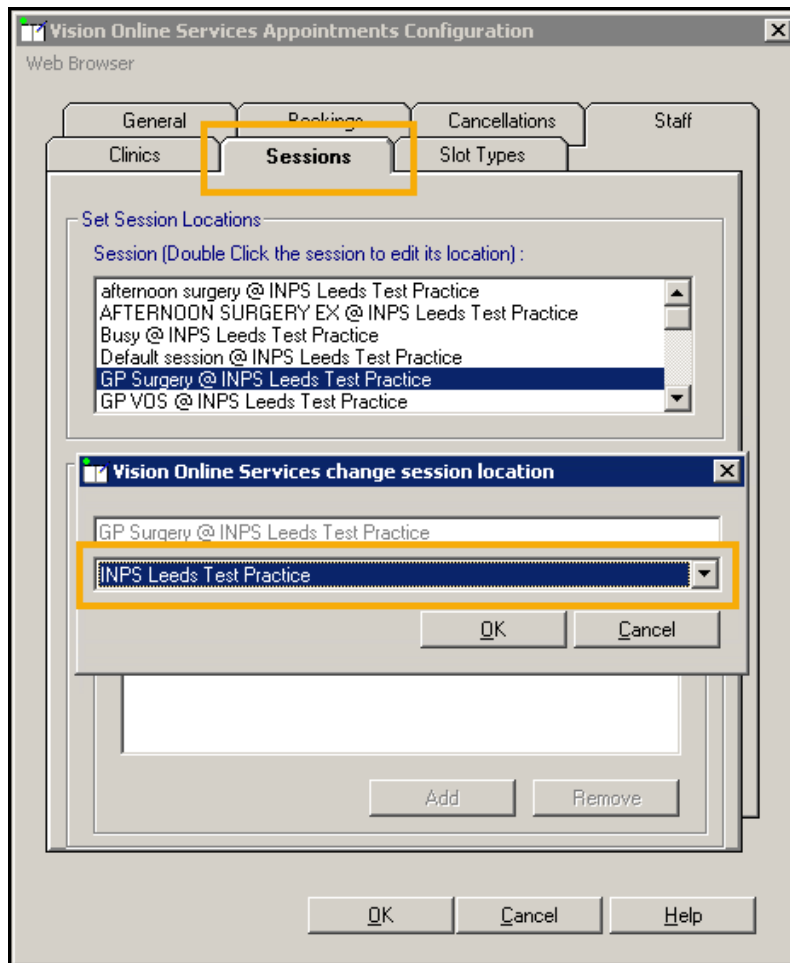
- **File Maintenance - Online**



2. The **Vision Online Services** screen displays. From **Services - Appointments**, select **Configure**:



3. Select the **Sessions** tab and one by one, double click on each session and select the appropriate location (site) for that session:

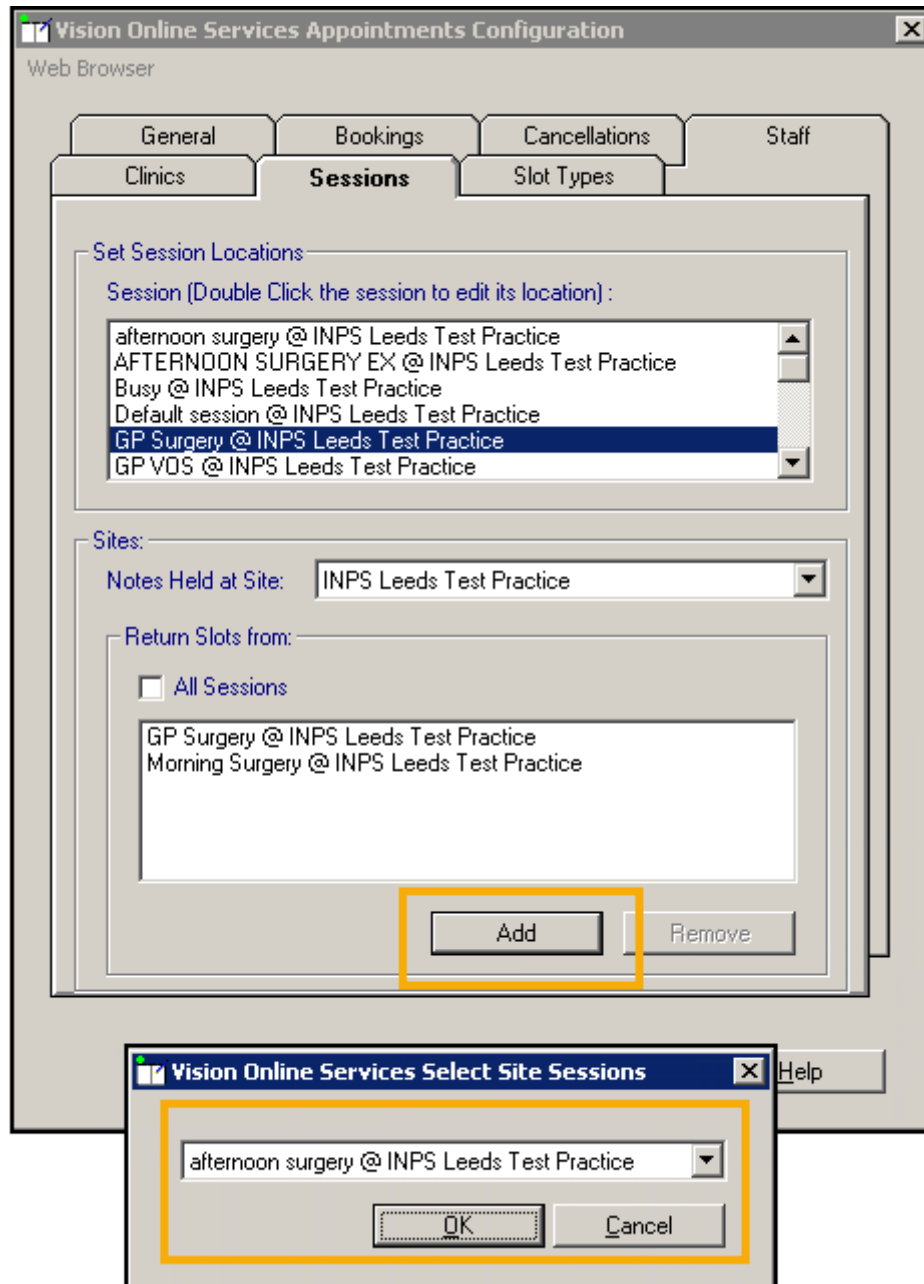


4. Select **OK** to save.
5. From **Sites - Notes Held at Site**, select the site you are setting up and remove the tick in **All Sessions**.



**Training Tip** - The removal of the tick in **All Sessions** is what limits your patients choice, leave it ticked to display all available sessions at all sites.

6. Select **Add** and select the session for your specific site, select **OK** and repeat until all the sessions for this site display in the **Return Slots from** list:

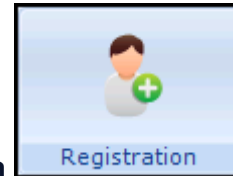


7. Select **Cancel**.
8. Select **OK** to save.

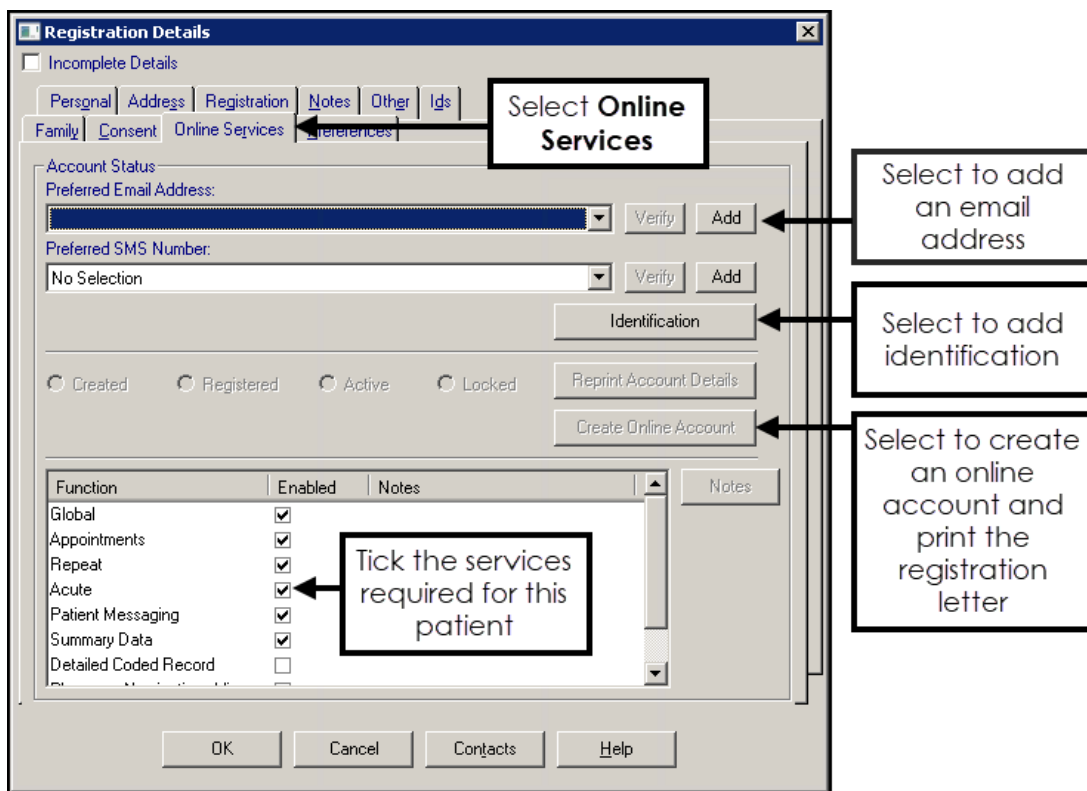


## Creating a Patient Online Account

To create an online account for a patient, complete the following:



1. From the **Vision 3** front screen, select **Registration** and then select the patient required.
2. The **Registration Details** screen displays, select the **Online Services** tab:



**Registration Details**

Incomplete Details

Personal | Address | **Registration** | Notes | Other | Ids

Family | Consent | **Online Services** | Preferences

Account Status

Preferred Email Address: [Text Field] [Verify] [Add]

Preferred SMS Number: [No Selection] [Verify] [Add]


Identification [Button]

Created
  Registered
  Active
  Locked
 [Reprint Account Details]
 [Create Online Account]

Function	Enabled	Notes
Global	<input checked="" type="checkbox"/>	
Appointments	<input checked="" type="checkbox"/>	
Repeat	<input checked="" type="checkbox"/>	
Acute	<input checked="" type="checkbox"/>	
Patient Messaging	<input checked="" type="checkbox"/>	
Summary Data	<input checked="" type="checkbox"/>	
Detailed Coded Record	<input type="checkbox"/>	


OK Cancel Contacts Help

3. Complete the following:
  - **Preferred Email Address**
  - **Preferred SMS Number**
  - **Add Patient Identity Verification Details**
  - **Select Online Services**

 **Note** - If you update a patient's **Preferred Email Address**, **Preferred SMS Number** or any **Function** and select **OK**, without selecting **Create Online Account**, an error message displays. Select **OK** to undo your changes or **Cancel** to return to the **Online Services** tab and select **Create Online Account** to create an online account.

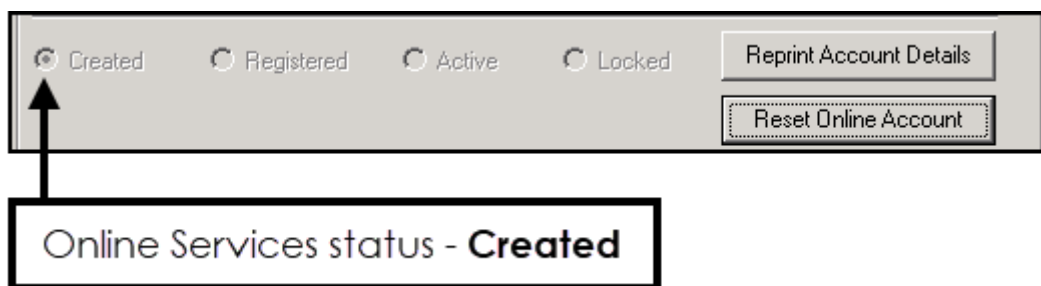
4. Select **Create Online Account**. Your preferred word processor launches displaying a letter containing the patient's online registration details.

---

 **Note** - If you are using a **Microsoft Office 365** version of **Word**, you must ensure **Open e-mail attachments and other uneditable files in reading view** is ticked, see [Setting Up Microsoft Office 365 Word for Patient Online Services](#) on page [43](#) for details.

---

5. Check the details, print out the letter and hand it to the patient. If the patient has a verified email address, a PDF (printable) copy of the letter is also emailed to the patient. The **Online Services** tab updates to display that the account is **Created**:



6. Select **OK** to close.

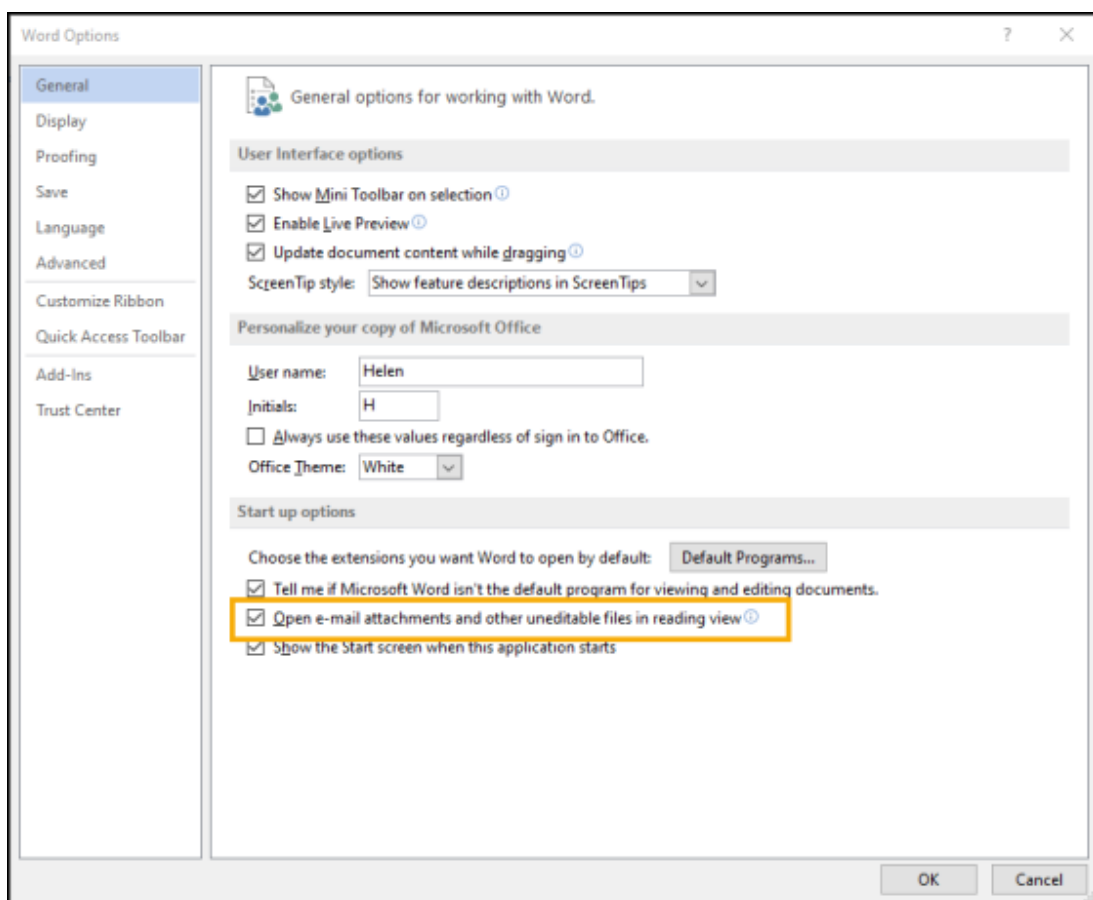
## Appendix

### Setting Up Microsoft Office 365 Word for Patient Online Services

If you use **Microsoft Office 365** for your word processing, **Open e-mail attachments and other uneditable files in reading view** must be ticked.

To check this setting:

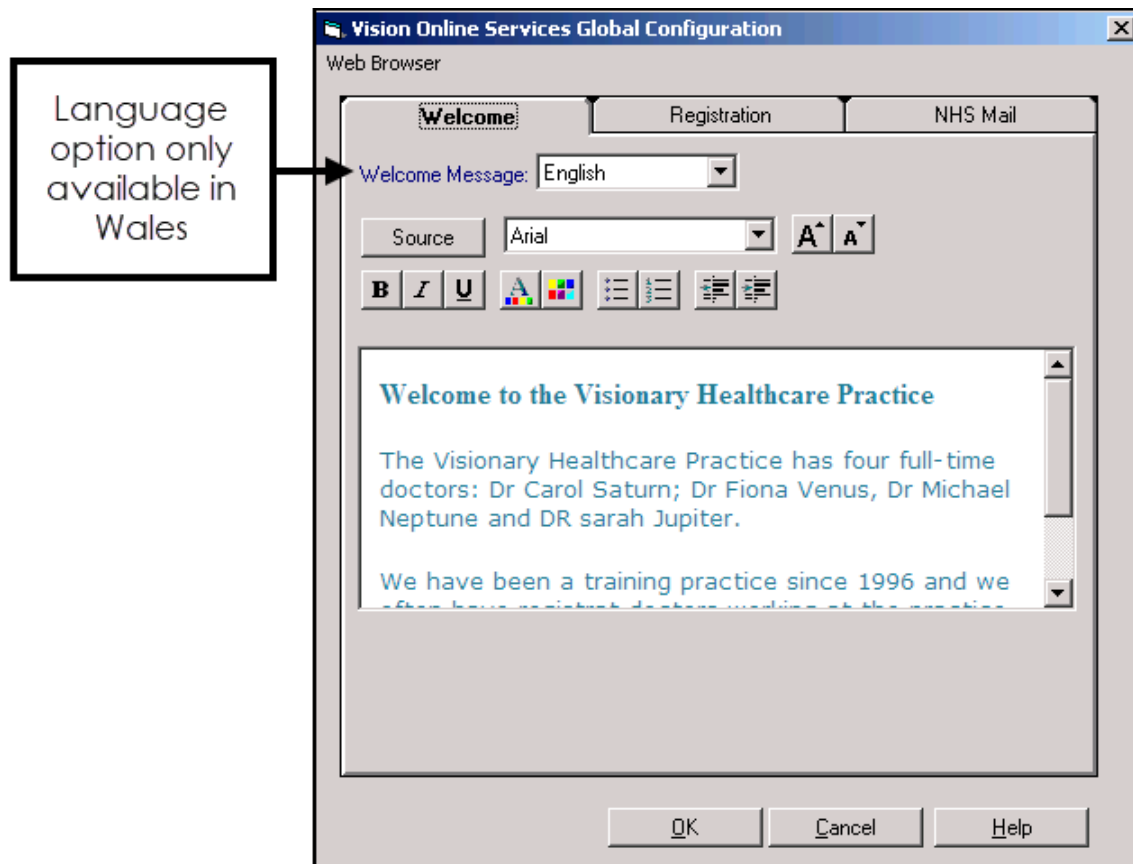
1. With **Vision 3** closed, open a blank **Microsoft Word** document.
2. Select **File - Options - General** and then under **Start up options**, tick **Open e-mail attachments and other uneditable files in reading view**:



3. Select **OK** to save.



## Using the Message Editor

The message editor allows you to format online messages. It is available in the **Welcome**, **Appointments** and **Prescription** message configuration screens:




Enter your message in the **Welcome Message** screen using the following formatting:

- 
**Welcome Message** (Wales only) - Select a language for this version, remember you should be adding both an English version and a Welsh version.
- 
**Source** - Displays the HTML source of the message and is the only way you can add tables. If you are comfortable working with HTML tags, you may want to use this view to edit the HTML directly. See [Formatting HTML Messages](#) on page 45 for details.
- 
**Font** - Allows you to change the font.
- 
**Font size** - Allows you to increase and decrease the text size of the highlighted text.
- 
**Bold, Italic, Underlined.**
- 
**Text colour/ Background colour.**

-  **Bulleted/numbered list.**
-  **Decrease/increase indent.**

---

 **Note** - If you want to add an image to your message, you must link to an image which can be accessed over the Internet and not one stored locally. Locally stored images do not display on the website.

---

## Formatting HTML Messages

Messages can be formatted using HTML formatting tags. HTML tags are:

- Used either side of a keyword you wish to format.
- The tag always has angle brackets, denoting the starting and closing of the tag, for example, <html>.
- HTML tags normally come in pairs, for example, <b> (the starting tag) and </b> (the closing tag).
- You can use multiple tags, but each tag must have brackets at the start and end of the tag, for example, <p><b>.

This is a list of the most common codes:

Starting Tag	Closing Tag	Description
<h1>	</h1>	First Heading. Headings can be defined with <h1> to <h6> tags. <h1> is the largest heading and <h6> is the smallest.
<p>	</p>	Paragraph
<b>	</b>	<b>Bold</b> text
<i>	</i>	<i>Italic text</i>
<small>	</small>	Small text
<sub>	</sub>	Subscript text
<sup>	</sup>	Superscript text
 		This tag adds a single line break, it does not need a closing tag.

For example, applying the bold <b> tag to the 1st line of the message like this:

- <b>Welcome to the Visionary Healthcare Practice</b>

Displays as:

- **Welcome to the Visionary Healthcare Practice**