

Setting Up Appointment Sessions for Branch Sites

If you have a main site and branch site(s), 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 <u>Selecting a</u> <u>Patient</u> in the **Registration Help Centre** for details if required.

2. The **Registration Details** screen displays, select the **Other** tab.

Registration Details	×
Incomplete Details	
Family Consent Online Services Creierence Personal Address Registration Notes Other	
RPP Mileage: Walking units:	Additional Identifier:
Blocked route or Special district:	Dispensing: Prescription charge exemption:
No Selection	No selection
Household Rank:	Capitation Supplement:
No selection	No selection
Medical Insurance:	Notes Kept at:
No Selection	INPS Leeds Test Practice
Records Requested by TP:	Records Constay 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 <u>Branch Surgery</u> 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

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



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

Yision Online Services	×
Global Enable Vision Online Services OSU	Configure
Appointments: 🔽 Enabled	Configure.
Prescription: Repeat: Enabled	

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

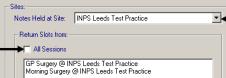
Vision Online Services Appointments Configuration	X
Web Browser	
General Pool/inco	
Clinics Sessions Slot Types	
Set Session Locations	
Session (Double Click the session to edit its location) :	
afternoon surgery @ INPS Leeds Test Practice AFTERNOON SURGERY EX @ INPS Leeds Test Practice	
Busy @ INPS Leeds Test Practice	
Default session @ INPS Leeds Test Practice GP Surgery @ INPS Leeds Test Practice	
GP VOS @ INPS Leeds Test Practice	
Vision Online Services change session location	
GP Surgerv @ INPS Leeds Test Practice	
INPS Leeds Test Practice	
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- 4. Select **OK** to save.
- 5. If you want patients to be able to make appointments at any site (main and branch sites), ensure the **Return Slots from: All Sessions** check box is ticked.

If you want to restrict appointment booking to specific locations, for example, a branch site only, remove the tick from **All Sessions** and select the location from **Sites - Notes Held at Site**.

Remove the tick from **All** Sessions to restrict the location a patient can book appointments at



Select the **Notes Held at Site** from the drop-down list, to update the appointment restrictions for all patients whose notes are held at that location

Training Tip - The removal of the tick in **All Sessions** is what limits your patient's 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.

sion Online Servic	es Appointments	Configuration	
Browser			
General Clinics	Bookings Sessions	Cancellations Slot Types	Staff
afternoon surger AFTERNOON S Busy @ INPS Le Default session (Click the session to e y @ INPS Leeds Tes	t Practice 5 Leeds Test Practice Practice	
GP VOS @ INPS	6 Leeds Test Practice	3	_
	m:	ractice	_
		Add	nove
	line Services Sele		

- 7. Select **Cancel** once you have finished updating the sessions.
- 8. Select **OK** to save.

Note - To print this topic select **Print** in the top right corner and follow the on-screen prompts.