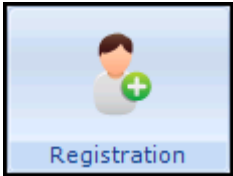


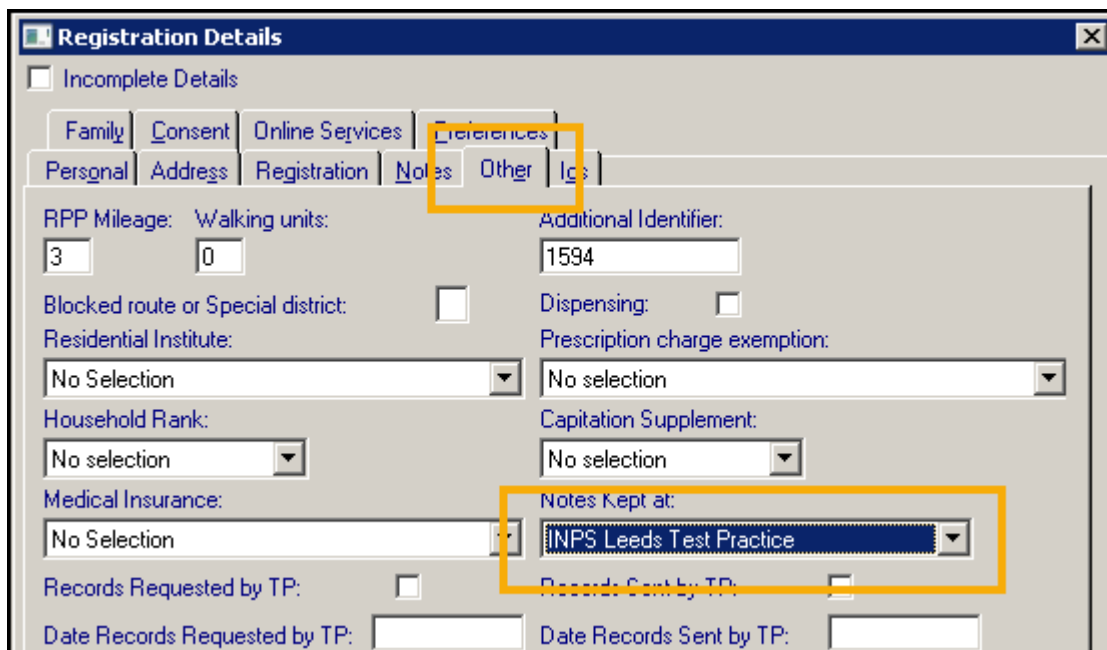
Setting Up Appointment Sessions for Branch Sites

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 [Selecting a Patient](#) 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 | **Other** | Preferences | Personal | Address | Registration | Notes | Logs

RPP Mileage: Walking units: Additional Identifier:
 3 0 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: **INPS Leeds Test Practice**

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

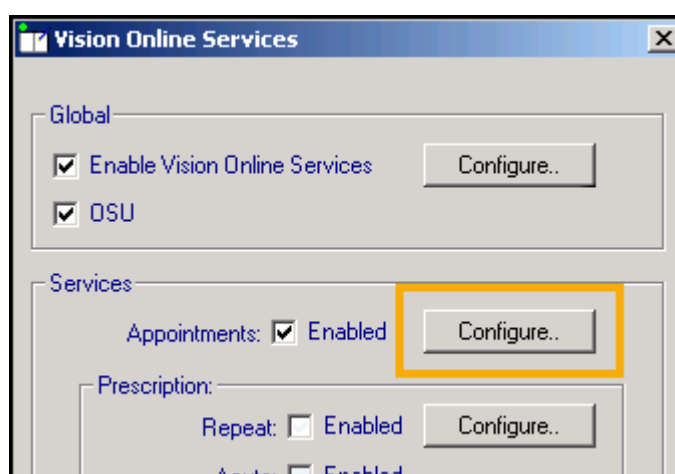
1. From the **Vision 3** front screen, select **Management Tool - Control Panel**



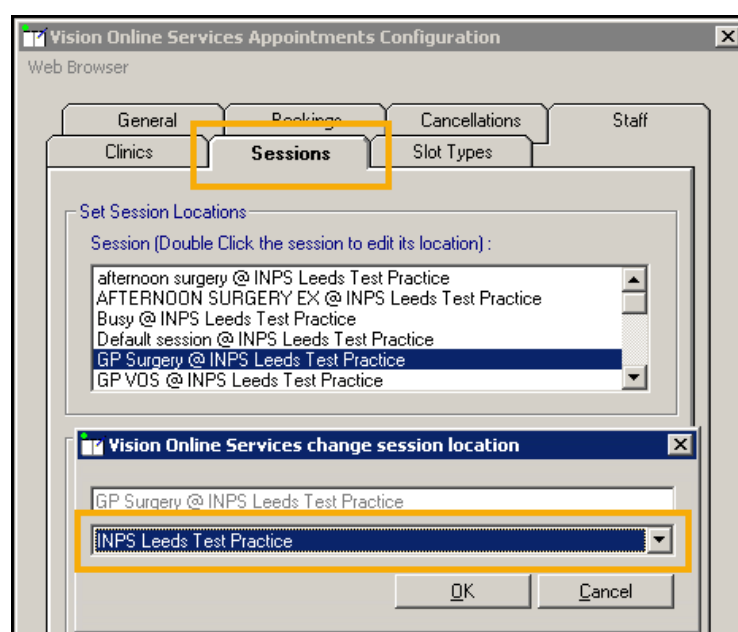
- File Maintenance - Online



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

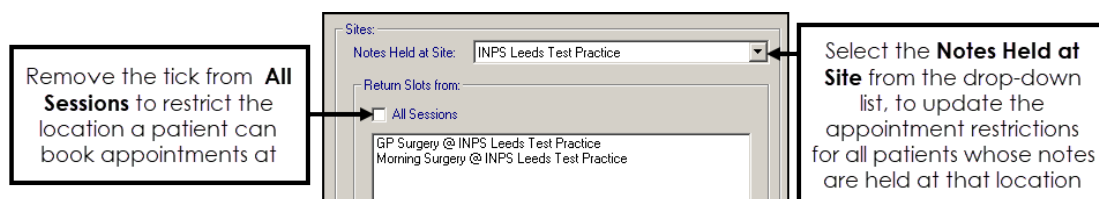


3. Select the **Sessions** tab and one by one, double click on each session and select the appropriate location (site) for that session.



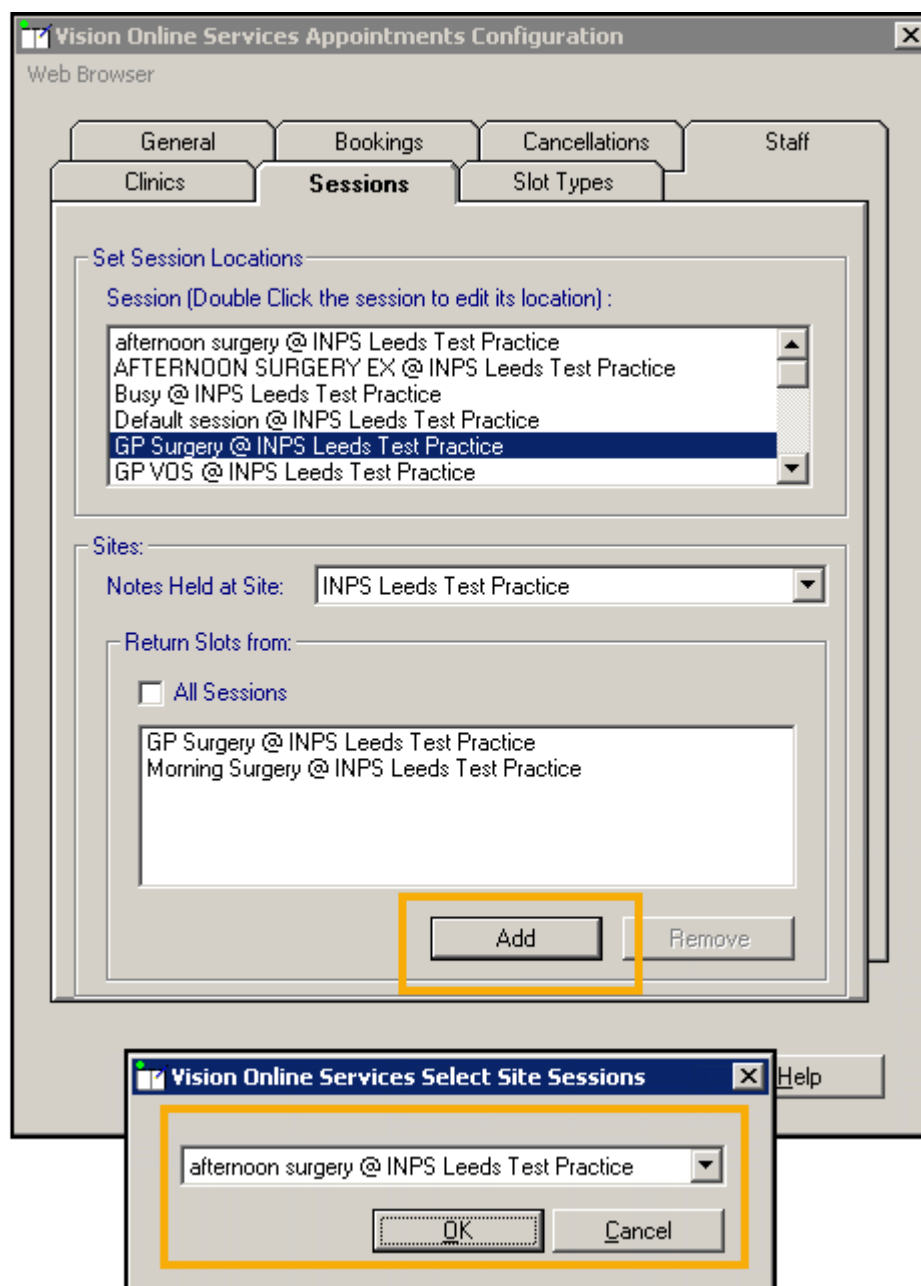
4. Select **OK** to save.
5. If you want patients to be able to make appointments at any site (main and branch sites), ensure the **Return Slots from: All Sessions** check box is ticked.

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**.





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.



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.
