

Shared Appointments Overview

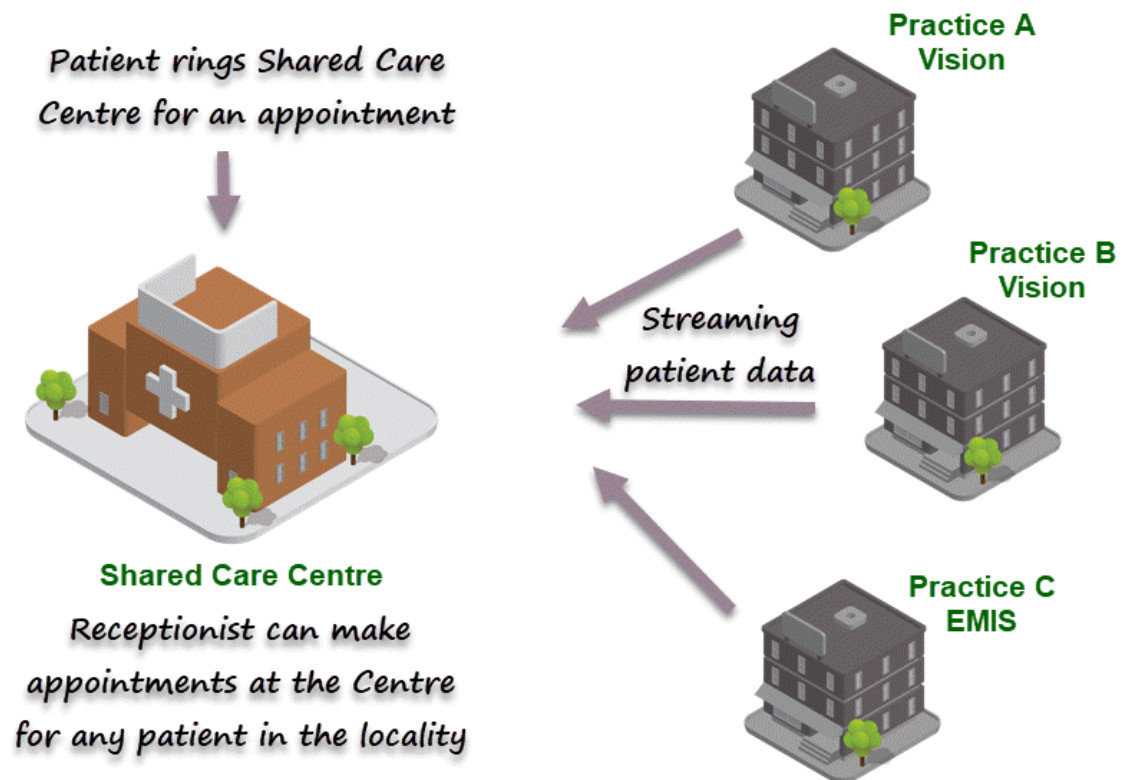
Vision Shared Appointments allows for the sharing of appointments books beyond the practice boundary. Using Shared Appointments you can view, book and cancel patient appointments for a Shared Care service.

The solution can be used to support:

- Multiple practices located within the same building sharing reception staff/nursing staff.
- Shared Care working e.g. Prime Minister's Challenge Fund for practices provisioning extended working hours across a locality.
- Extended Access.

Shared Appointments works with both Vision and EMIS practices, and can be configured in multiple ways:

- A patient can for example, contact their practice for an appointment, and if one isn't available then the practice can book the patient into the Shared Care Centre.
- Alternatively, a patient can contact the Shared Care Centre directly, and the receptionist can book an appointment at the centre for any patient in the defined locality.



Note - Vision Shared Appointments works with both Vision and EMIS practices.

Home Screen Overview

Vision Shared Appointments **Home** screen.

From here you can:

- Return to **Clinical Portal** menu.
- Select / Deselect Patients.



See [Select a Patient on page 8](#) for more information.

- Access the different Appointment views.



See [Clinicians List Overview](#), [Clipboard View](#), [Reception View](#), [View a Patient's Appointments](#) and [Special Bookings View](#) for more information.

- Set Call Display settings.



See [Call Display](#) for more information.

- Print Appointment reports.

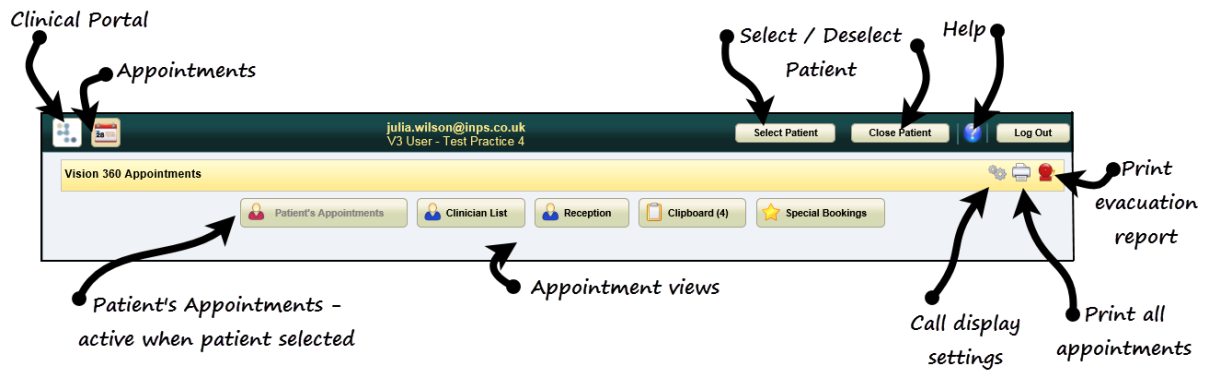


See [Print Full Appointment List](#) for more information.


- Print Emergency Evacuation report.





See [Print Evacuation Report](#) for more information.




Vision Shared Appointments Overview


- 
Patient's Appointments - Displays the appointments booked for the patient, you can also book new appointments and manage existing bookings.



➔ See [Patient's Appointments View](#) for more information.
- 
Clinician List - Displays appointments by clinician/clinic including appointment comments.



➔ See [Clinicians List Overview](#) for more information.
- 
Reception - Displays multiple clinician/clinic books.


➔ See [Reception View](#) for more information.
- 
Clipboard - Allows you to move bookings, the number in brackets indicates the count of appointments on the clipboard.

➔ See [Clipboard View](#) for more information.

-  **Special Bookings** - Allows you to book appointments for temporary/non-registered patients or 3rd parties.

 See [Special Bookings View](#) for more information.
-  **Evacuation Report** - Prints the emergency evacuation report.

 See [Print Evacuation Report](#) for more information.
-  **Print** - Displays the Print Full Appointment List screen allowing you to specify which data to include and exclude in the printed list of appointments.

 See [Print Full Appointment List](#) for more information.

When a patient is selected, the **Patient's Appointments** view displays by default.

Accessing Shared Appointments

Vision Shared Appointments is accessed from the **Clinical Portal**.



1. Double-click on the **Clinical Portal** icon on your desktop.

The **Clinical Portal** login screen displays.



2. Enter your **User Name** and **Password**.



Note - Your user name is your email address.

Vision practices - use your Vision 3 password. For English sites this is the offline password.

3. Select your **Organisation** from the drop down.
4. Select **Sign In**.



Note - If you have forgotten your password, it can be reset it by your systems administrator.

The **Clinical Portal** main screen displays:

5. Select the **Appointments** button.

The **Appointments** screen displays.

6. From the **Appointments Home** screen you can:

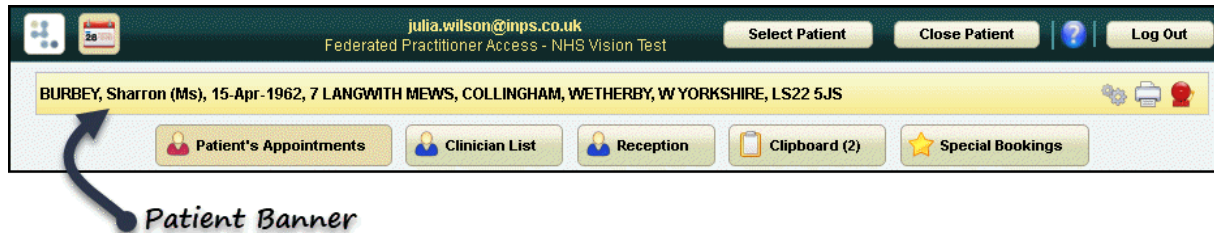



- Return to **Clinical Portal** menu.
- Select / Deselect Patients.
See - [Select a Patient on the next page](#).
- Access the different Appointment views.
See - [Clinicians List Overview](#), [Clipboard View](#), [Reception View](#), [View a Patient's Appointments](#) and [Special Bookings View](#).
- Set Call Display settings.
See - [Call Display](#).
- Print Appointment reports.
See - [Print Full Appointment List](#).
- Print Emergency Evacuation report.
See - [Print Evacuation Report](#).

Select a Patient

The **Patient Select** screen allows you to search for a patient using various criteria including surname, date of birth and NHS/CHI number.

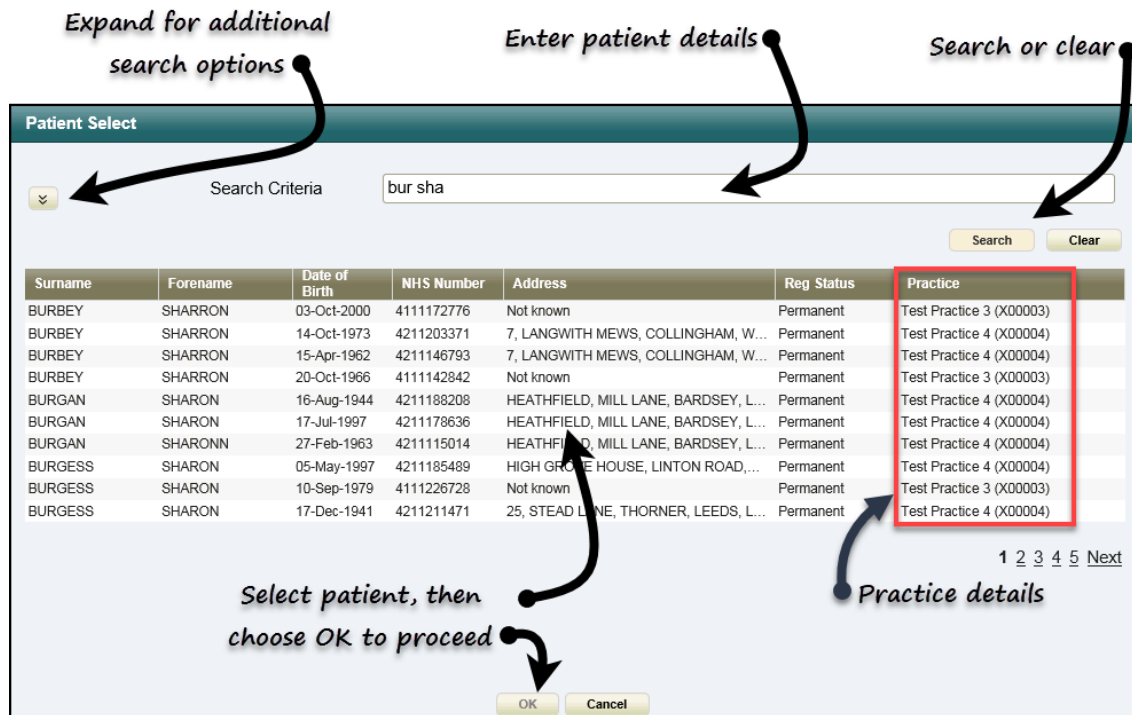
When a patient is selected their demographics display in the **Patient Banner**.



 **Note** - If you already have a patient open and you choose a different patient, the currently selected patient record will be closed.

Patient Search

1. Select the **Select Patient** button.
2. Entering all or part of the patient's surname, optionally forename and/or date of birth in the **Search Criteria** box:



Expand for additional search options

Enter patient details

Search or clear

Patient Select

Search Criteria: bur sha

Search Clear

Surname	Forename	Date of Birth	NHS Number	Address	Reg Status	Practice
BURBEY	SHARRON	03-Oct-2000	4111172776	Not known	Permanent	Test Practice 3 (X00003)
BURBEY	SHARRON	14-Oct-1973	4211203371	7, LANGWITH MEWS, COLLINGHAM, W...	Permanent	Test Practice 4 (X00004)
BURBEY	SHARRON	15-Apr-1962	4211146793	7, LANGWITH MEWS, COLLINGHAM, W...	Permanent	Test Practice 4 (X00004)
BURBEY	SHARRON	20-Oct-1966	4111142842	Not known	Permanent	Test Practice 3 (X00003)
BURGAN	SHARON	16-Aug-1944	4211188208	HEATHFIELD, MILL LANE, BARDSEY, L...	Permanent	Test Practice 4 (X00004)
BURGAN	SHARON	17-Jul-1997	4211178636	HEATHFIELD, MILL LANE, BARDSEY, L...	Permanent	Test Practice 4 (X00004)
BURGAN	SHARRON	27-Feb-1963	4211115014	HEATHFIELD, MILL LANE, BARDSEY, L...	Permanent	Test Practice 4 (X00004)
BURGESS	SHARON	05-May-1997	4211185489	HIGH GROVE HOUSE, LINTON ROAD, ...	Permanent	Test Practice 4 (X00004)
BURGESS	SHARON	10-Sep-1979	4111226728	Not known	Permanent	Test Practice 3 (X00003)
BURGESS	SHARON	17-Dec-1941	4211211471	25, STEAD LANE, THORNER, LEEDS, L...	Permanent	Test Practice 4 (X00004)

Select patient, then choose OK to proceed


Practice details

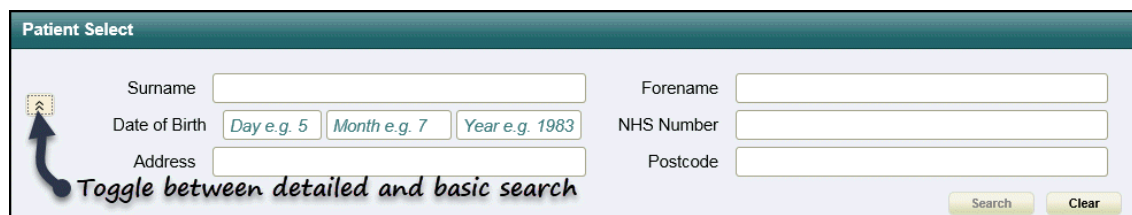
1 2 3 4 5 Next

OK Cancel

3. Select **Search**.
4. Select the patient and click **OK**.

Detailed Patient Search

1. Select the **Expand** button  to activate more search options, which include **Address**, **Postcode** and **NHS/CHI Number**.



Patient Select

Expand button (up arrow icon)

Surname:

Forename:

Date of Birth: Day e.g. 5 Month e.g. 7 Year e.g. 1983

NHS Number:


Address:

Postcode:

Toggle between detailed and basic search

Search Clear

2. Enter patient details.


 **Note** - To search by postcode, a minimum of two characters must be entered in the Postcode box.

3. Select **Search**.



4. Choose the patient and select **OK**.




Deselect Patient

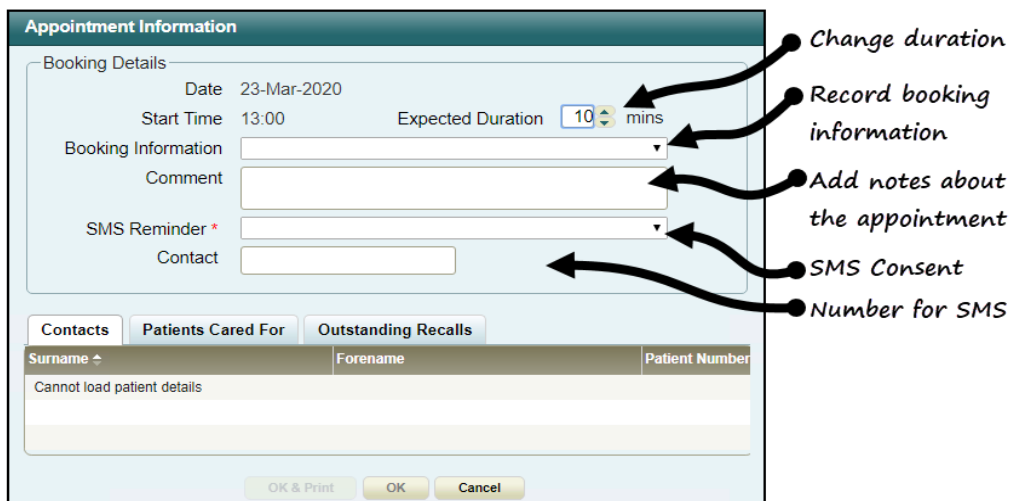
The active patient showing in the **Patient Banner** can be deselected by either choosing another patient or selecting the **Close Patient**  button.

Booking Appointments

1. Select the **Reception**  button.
Reception view displays. See - [Reception View](#).
2. Select the slot and double click or select the **Make booking**  button.
The **Patient Select** screen displays.
3. Select a patient. See - [Select a Patient on page 8](#).

 **Note** - If you already have an active patient displayed in the patient banner, selecting a patient does not change the active patient.

The **Appointment Information** booking form displays:



The screenshot shows the 'Appointment Information' form. Annotations with arrows point to specific fields:

- Change duration**: Points to the 'Expected Duration' field, which is set to 10 mins.
- Record booking information**: Points to the 'Booking Information' drop-down menu.
- Add notes about the appointment**: Points to the 'Comment' text area.
- SMS Consent**: Points to the 'SMS Reminder *' drop-down menu.
- Number for SMS**: Points to the 'Contact' text field.

At the bottom, there are tabs for 'Contacts', 'Patients Cared For', and 'Outstanding Recalls'. Below these is a table with columns 'Surname', 'Forename', and 'Patient Number'. The table currently displays 'Cannot load patient details'. At the very bottom are buttons for 'OK & Print', 'OK', and 'Cancel'.

4. Update the booking form as required:
 - Extend the duration.
 - Record booking information via the drop-down list.
 - Add comments relating to the appointment.
 - Add SMS Reminder consent status via the drop-down list.

- Add Contact number for SMS reminders.



Note - In a shared care setting, appointments for patients who are registered at an EMIS practice and no sharing agreement exists, are booked as special bookings with demographic information populated.

See - [Special Booking on page 17](#).


1. Select **OK** to finish or select **OK & Print** to issue an appointment card.
A booking confirmation message displays.

Appointment booked on Tuesday the 13th of August at 09:50 with Dr Carol Saturn



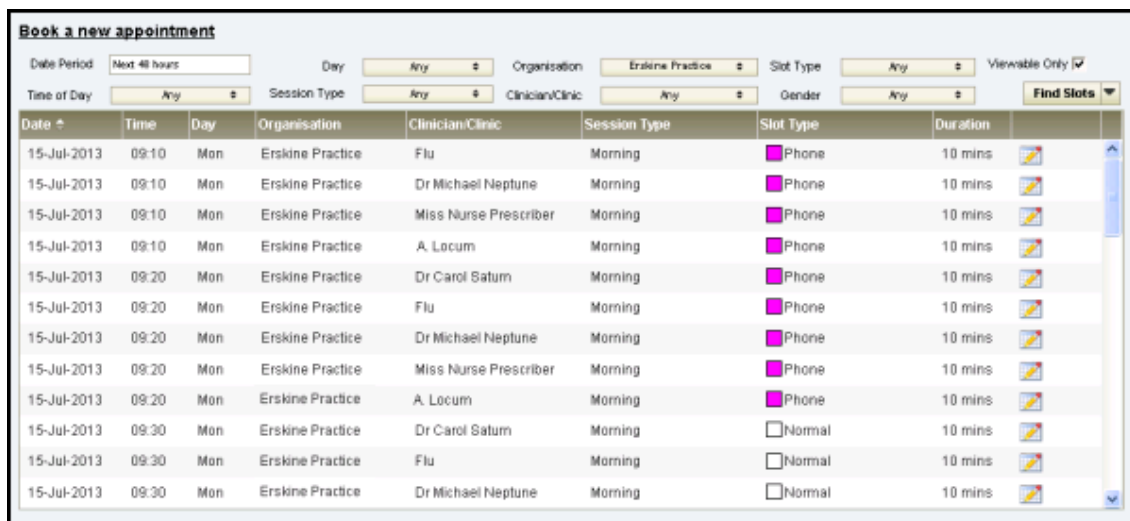
See [Reception View](#) and [Sending SMS](#) for more information.

Book an Appointment - Patients View

1. Select the **Select Patient**  button. See - [Select a Patient on page 8](#).

The **Patient's Appointment** view displays.

2. The **Book a new appointment** section at the lower part of the screen shows the next available appointments.



Book a new appointment

Date Period: Day: Organisation: Slot Type: Viewable Only ☒

Time of Day: Session Type: Clinician/Clinic: Gender: **Find Slots**

Date	Time	Day	Organisation	Clinician/Clinic	Session Type	Slot Type	Duration
15-Jul-2013	09:10	Mon	Erskine Practice	Flu	Morning	Phone	10 mins
15-Jul-2013	09:10	Mon	Erskine Practice	Dr Michael Neptune	Morning	Phone	10 mins
15-Jul-2013	09:10	Mon	Erskine Practice	Miss Nurse Prescriber	Morning	Phone	10 mins
15-Jul-2013	09:10	Mon	Erskine Practice	A. Locum	Morning	Phone	10 mins
15-Jul-2013	09:20	Mon	Erskine Practice	Dr Carol Saturn	Morning	Phone	10 mins
15-Jul-2013	09:20	Mon	Erskine Practice	Flu	Morning	Phone	10 mins
15-Jul-2013	09:20	Mon	Erskine Practice	Dr Michael Neptune	Morning	Phone	10 mins
15-Jul-2013	09:20	Mon	Erskine Practice	Miss Nurse Prescriber	Morning	Phone	10 mins
15-Jul-2013	09:20	Mon	Erskine Practice	A. Locum	Morning	Phone	10 mins
15-Jul-2013	09:30	Mon	Erskine Practice	Dr Carol Saturn	Morning	Normal	10 mins
15-Jul-2013	09:30	Mon	Erskine Practice	Flu	Morning	Normal	10 mins
15-Jul-2013	09:30	Mon	Erskine Practice	Dr Michael Neptune	Morning	Normal	10 mins

3. Optionally, use the filters to refine the appointments.
Or select the **Find Slots** drop-down to display a list of saved slot searches and select the search you want to run. See - [Create Free Slot Search](#).



Book a new appointment

Date Period: Day: Organisation: Slot Type: Viewable Only ☒

Time of Day: Session Type: Clinician/Clinic: Gender: **Find Slots**

Apply filters to find specific appointments → *Access saved searches* →

Date	Time	Day	Organisation	Clinician/Clinic	Session Type	Slot Type	Duration
31-Jul-2017	14:10	Mon	Test Practice 4	Diabetic Clinic	Diabetic Clinic	Diabetic Clinic	10 mins
31-Jul-2017	14:10	Mon	Test Practice 4	Miss Nurse Prescriber	Baby Clinic	Normal	5 mins
31-Jul-2017	14:15	Mon	Test Practice 4	Miss Nurse Prescriber	Baby Clinic	Normal	5 mins

Available filters:

Date period - select the box to display options

- Next 48 hours (default)
- This week
- Next week
- This month
- Next month
- Specific date - Opens the calendar.
- Date range - Opens the calendar.

Day

- **Any** (default)
- Select a specific day(s).

Time of day

- **Any** (default)
- Select **AM** or **PM**

Gender - The clinician's gender, choose from:

- **Any** (default)
- Select **Male** or **Female**


Additional options

- **Organisation** - Location of appointment.
- **Slot Type** - All active slot types. (Default - all)
Multiple select is available.
- **Viewable Only** - This hides slots that are marked as non-viewable.
- **Session Type** - The active session types. (Default - all)
Multiple select is available.
- **Clinician/Clinic** - The clinicians/clinics for the selected organisation. (Default - all)
Multiple select is available.

 **Note** - See - [Slot Type Warnings](#) for details on slot types and associated warnings.

4. Select the **Find Slots**  button.

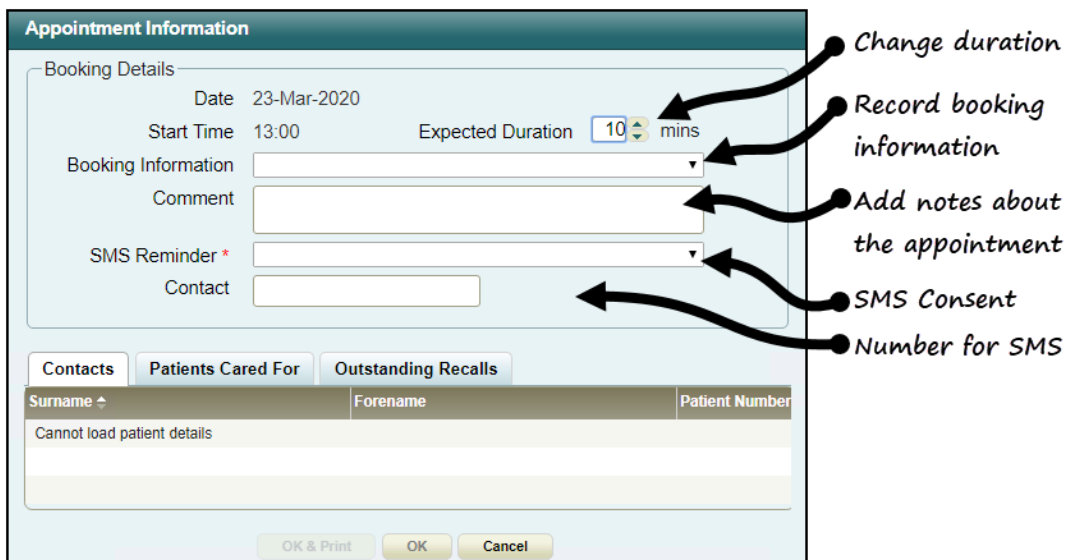
The list of available slots displays. This is ordered by date and time ascending, if you select another column to sort by, this is applied as a secondary sort.

 **Note** - If the number of matching slots exceeds 50, the following message displays: 'There are more than 50 available slots – the first 50 only are listed here'.


5. To book, select the **Make booking**  button or double-click the slot.

 **Note** - You can book inactive slots - these are shown with a black slot type.

The **Appointment Information** booking screen opens:



The screenshot shows the 'Appointment Information' booking screen. It includes fields for Date (23-Mar-2020), Start Time (13:00), Expected Duration (10 mins), Booking Information (dropdown), Comment (text area), SMS Reminder (dropdown), and Contact (text field). Below these are tabs for 'Contacts', 'Patients Cared For', and 'Outstanding Recalls'. The 'Patients Cared For' tab is active, showing a table with columns 'Surname', 'Forename', and 'Patient Number'. The table currently displays 'Cannot load patient details'. At the bottom are buttons for 'OK & Print', 'OK', and 'Cancel'. Annotations with arrows point to specific fields: 'Change duration' points to the Expected Duration field; 'Record booking information' points to the Booking Information dropdown; 'Add notes about the appointment' points to the Comment text area; 'SMS Consent' points to the SMS Reminder dropdown; and 'Number for SMS' points to the Contact text field.

 **Note** - In a shared care setting, appointments for patients who are registered at an EMIS practice and no sharing agreement


exists, are booked as special bookings with demographic information populated.

6. Optionally, update the booking form:

- Extend the duration.
- Record booking information via the drop-down list.
- Add comments relating to the appointment.
- Add SMS Reminder consent status via the drop-down list.
- Add Contact number for SMS reminders.

7. Select **OK** to finish or select **OK & Print** to issue an appointment card.

A booking confirmation message displays:



See [Patient's Appointments View](#) for more information.

Special Booking

You can make special bookings for:

- Non-registered patient appointments.
- Non-patient appointments, for example, appointment with drug rep.
- In a shared care setting, patients who are registered at an EMIS practice, and a sharing agreement is not in place, are automatically booked as special bookings with all demographic information populated.

Making a special booking:

1. Select the **Special Bookings**  button, at the top of the window.

The **Special Bookings** view displays.

2. In the **Book a new appointment** section, select the **Organisation**.
3. Apply filters using the drop-down boxes if required.

4. Select the **Find Slots**  button.

Matching slots display.

The list of available slots is ordered by date and time ascending. If you select another column to sort by, the date and time apply as a secondary sort.



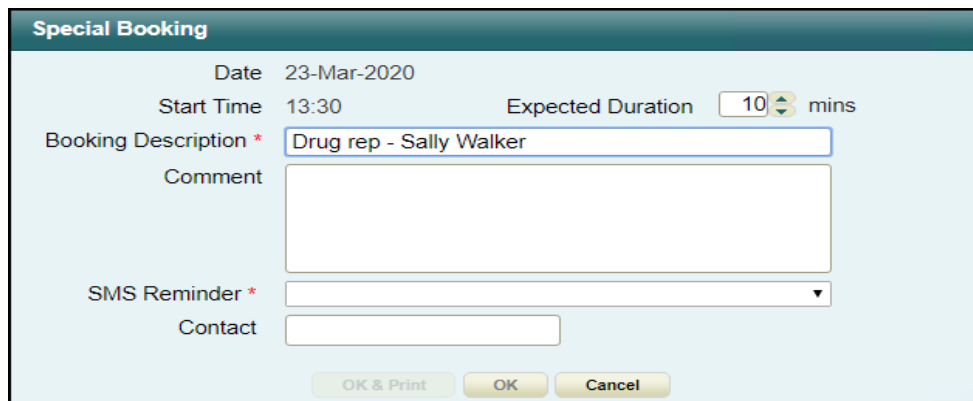
Note - If the number of matching slots exceeds 50, the following message displays: 'There are more than 50 available slots - the first 50 only are listed here'.

5. Double-click the slot or select the **Make booking**  button to book.



Note - You can also book inactive slots shown with the black slot type colour.

6. The **Special Booking** form displays the appointment details.



The screenshot shows the 'Special Booking' form with the following fields and values:

- Date:** 23-Mar-2020
- Start Time:** 13:30
- Expected Duration:** 10 mins
- Booking Description *:** Drug rep - Sally Walker
- Comment:** (Empty text area)
- SMS Reminder *:** (Dropdown menu)
- Contact:** (Empty text field)
- Buttons:** OK & Print, OK, Cancel

7. Enter the description in the **Booking Description** box.
8. Optionally, record contact details in the **Comment** box.
9. Choose **SMS Status** from the drop-down, if the patient has consented to SMS add their mobile number to the **Contact** box.
10. Select **OK** to finish, or **OK & Print** - to print a label.

The booking confirmation message displays.

Appointment booked on Tuesday the 13th of August at 09:50 with Dr Carol Saturn

The special booking now displays in the **Booked appointments** section of the **Special Bookings** view.

The booking also displays in the **Reception** and **Clinician List** view - indicated by the **Special Booking**  symbol.

 See [Special Bookings View](#) and [Sending SMS Reminders](#) for more information.

Cancelling Appointments

You can cancel appointments in the **Patient's Appointments**, **Clinician List**, **Reception** and **Special Bookings** views.

An appointment cannot be cancelled after a patient has been checked in.


 **Note** - You can also cancel multiple appointments in the Clinician List view.

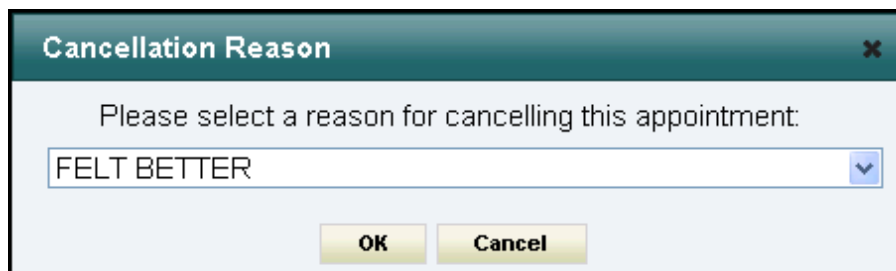
You can also remove an item from the Clipboard in the Clipboard view.

Patient's Appointments or Special Booking View:


1. Select **Patient's Appointments**  button or on **Special Bookings**  button.

The view displays.

2. Click the **Cancel Appointment**  button alongside the appointment you want to cancel.
3. Select a cancellation reason from the drop-down.
4. Select **OK**.



The appointment is removed from the list.

 **Note** - Cancelled patient appointments will be displayed in the Patient Appointments screen in a future release.

Clinician List or Reception View

1. Select the **Clinician List**  or on **Reception**  button.

The view displays.

2. Highlight the appointment.

3. Select the **Cancel Appointment**  button.

4. Choose the cancellation reason from the drop-down list.

5. Select **OK**.

The appointment is removed from the book.



Note - The cancellation reasons available from the drop-down list are defined in Vision 3.




See [Cancel Multiple Appointments](#) and [Remove Item from Clipboard](#) for more information.

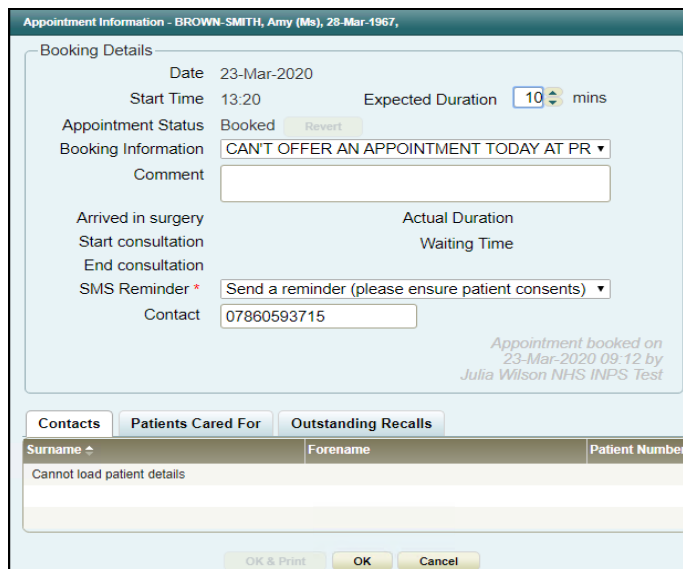
Editing Appointments

You can edit patient appointments in **Patient's Appointments** and **Reception** views. To edit a special booking, see - [Edit a Special Booking](#).

1. In the **Booked appointments** section of the **Patient's Appointments** view, select the **Edit**  button.

Or in the **Reception** view, highlight the appointment and select the **Edit**  button.

The **Appointment Information** screen displays:



The screenshot shows the 'Appointment Information' screen for a patient named BROWN SMITH, Amy (Ms), with a date of birth of 28-Mar-1967. The screen is divided into several sections:

- Booking Details:**
 - Date: 23-Mar-2020
 - Start Time: 13:20
 - Expected Duration: 10 mins (with a dropdown arrow)
 - Appointment Status: Booked (with a 'Revert' button)
 - Booking Information: CAN'T OFFER AN APPOINTMENT TODAY AT PR (with a dropdown arrow)
 - Comment: (empty text box)
- Arrived in surgery:**
 - Start consultation
 - End consultation
 - SMS Reminder *: Send a reminder (please ensure patient consents) (with a dropdown arrow)
 - Contact: 07860593715
- Actual Duration:** (empty text box)
- Waiting Time:** (empty text box)

At the bottom right, it says: 'Appointment booked on 23-Mar-2020 09:12 by Julia Wilson NHS INPS Test'.


Below the main form, there are three tabs: 'Contacts', 'Patients Cared For', and 'Outstanding Recalls'. The 'Patients Cared For' tab is selected, showing a table with columns: Surname, Forename, and Patient Number. The table currently displays 'Cannot load patient details'.

At the bottom of the screen, there are three buttons: 'OK & Print', 'OK', and 'Cancel'.

2. Edit the booking form as required:
 - **Extend the slot duration** - in the **Expected Duration** box.
If the extended slot overruns any subsequent slots, you will receive a warning.
See - [Extending an Appointment Duration](#) and [Overrun Slots Warning](#).
 - **Revert the status** - from **Arrived** back to **booked**, or from **In Consultation** back to **Arrived**, by clicking the **Revert** button.

- **Booking Information** - choose an alternative from the drop-down list.
- **Comments** - Add or edit a comment.


3. Select **OK** to make the changes.


 You can also **Move** an appointment to the **Clipboard** for re-scheduling later. See - [Move Item to Clipboard](#).





Check Patient in

You can mark a patient as arrived from the **Patient's Appointments** and **Reception** views:

Patient's Appointments View

1. Select a patient. See - [Select a Patient on page 8](#).
The **Patient's Appointments** view displays.
2. Locate today's appointment in the **Booked appointments** list, and select the green **Check In**  button.


The status updates to **Arrived** , the **Arrived in Surgery** time recorded and a confirmation message displays.

Booked appointments					
View all...		DNAs (10)		Appointment checked in successfully	
Date	Time	Status	Clinician/Clinic	Organisation	
28-Jul-2017	10:50	Arrived	Dr Fiona Venus	Test Practice 4	   




Note - once the patient has been checked in, the check in button alongside the appointment is disabled.


Reception View

1. Select the **Reception**  button.
The **Reception** view displays.
2. If needed, select the relevant organisation from the **Organisation** dropdown, and select the clinic/clinicians using the **View** button.
3. Locate the booked appointment.

4. Double-click the slot to check the patient in.

The status changes to **Arrived** , the **Arrived in Surgery** time recorded and the confirmation displays.

Appointment checked in successfully

 See [Patient Status on the facing page](#) and [Revert Patient Status on page 26](#) for more information.

Patient Status


The **Clinician** and **Reception** views use the following symbols to represent the patient status.



-  - **Booked Appointment**

➔ See [Booking Appointments on page 11](#) for more information.


-  - **Patient Arrived**

➔ See [Check Patient in on page 23](#) for more information.

-  - **Patient in Consultation** - Status is updates automatically when a clinician starts a consultation.

-  - **Patient has been Seen** - Status updates when a consultation is opened with the next patient, or this can be ended manually by selecting the **End Appointment**  button.

➔ See [Mark Patient as Seen](#) for more information.

-  - **DNA** - If the patient is not checked in, and their appointment time lapses, the status updates to DNA.

➔ See [Revert Patient Status on the next page](#) for more information on how to revert a patient status.


Revert Patient Status

You can revert a patient's appointment status from **Arrived** back to **Booked**, or from **In Consultation** back to **Arrived**.

1. Select a patient.



See [Select a Patient on page 8](#) for more information.

2. **Patient** view displays.
3. In the **Booked Appointments** section, locate the appointment you want to edit.
4. Select the **Edit Appointment**  button. The **Appointment Information** booking screen displays.
5. Select the **Revert** button alongside the **Appointment Status** to revert the appointment status:

Appointment Information - KALGARRIFF, Joseph (Mr), 21-Mar-1985,

Booking Details

Date

28-Jul-2017

Start Time

15:20

Expected Duration

10 mins

Appointment Status

Arrived

Revert

Booking Information

ON THE PHONE

Comment

6. The status reverts to **Booked** or **Arrived** depending on the previous status:

Appointment Information - KALGARRIFF, Joseph (Mr), 21-Mar-1985,

Booking Details

Date 28-Jul-2017

Start Time 15:20 Expected Duration 10 mins

Appointment Status **Booked** [Revert](#)

Booking Information ON THE PHONE

Comment

7. Select **OK** to confirm.

