# Vision Shared Appointments Quick Reference Guide for Reception Staff

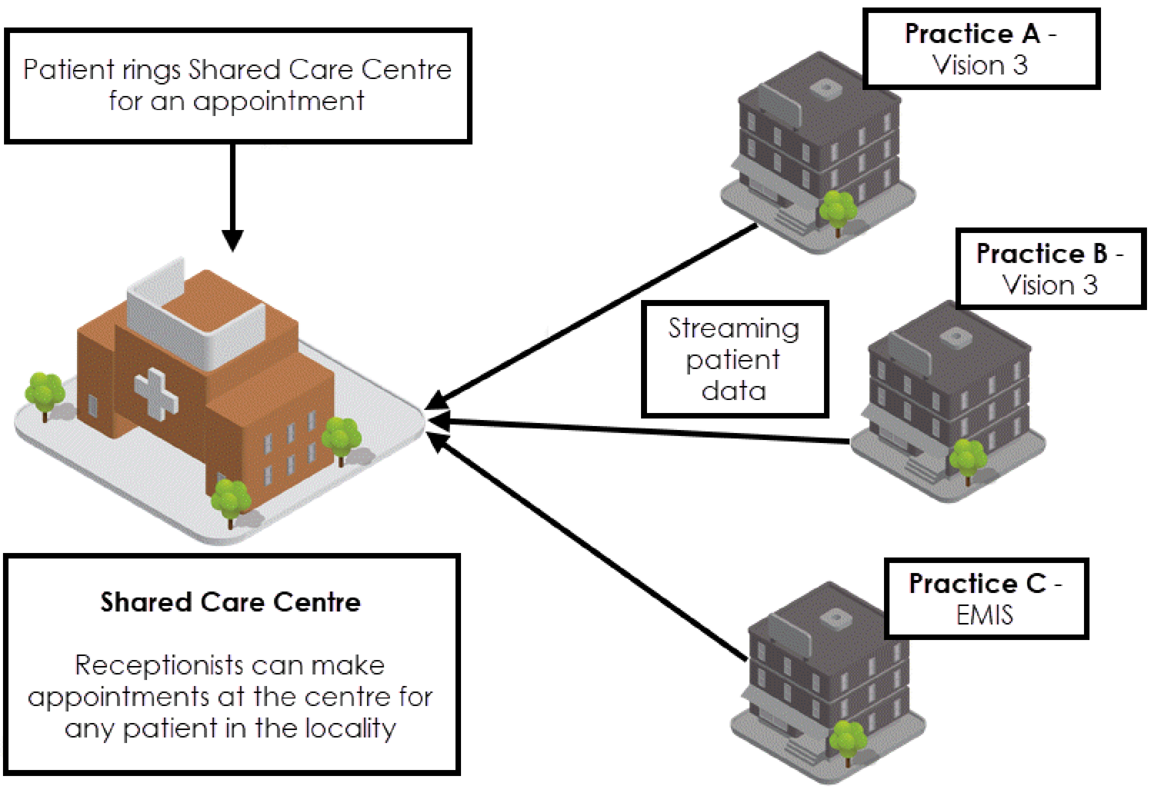
**Vision 3 Shared Appointments** allows for the sharing of appointments books beyond the practice boundary. Using **Shared Appointments** you can view, book and cancel patient appointments for a Shared Care service.

The solution can be used to support:

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

**Shared Appointments** works with both **Vision 3** 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:



# Home Screen Overview

From the Shared Appointments Home screen you can:

- Return to the **Vision360** menu.
- Select/Deselect Patients.
- Access the different **Appointment** views.
- Set **Call Display** settings.
- Print **Appointment** reports.
- Print **Emergency Evacuation** report.


# Vision 3 Shared Appointments Overview

Access the following options to enable you to utilise the full shared care functionality:

- **Patient Appointments** Patient's Appointments - Displays the appointments booked for the patient, you can also book new appointments and manage existing bookings.
- **Clinician List** Clinician List - Displays appointments by clinician/clinic including appointment comments.
- **Reception** Reception - Displays multiple clinician/clinic books.
- **Clipboard** Clipboard (2) - Allows you to move bookings, the number in brackets indicates the count of appointments on the clipboard.
- **Special Bookings** Special Bookings - Allows you to book appointments for temporary and non-registered patients or 3rd parties.
- **Evacuation Report** - Prints the emergency evacuation report.
- **Print** - Select to displays the **Print Full Appointment List** screen allowing you to specify which data to include and exclude in the printed list of appointments.

# Logging in to Shared Appointments

**Shared Appointments** is accessed from **Vision360**.

To log into **Shared Appointments**:

1. From your desktop, select **Vision360**, or open your browser and enter the url provided by the **Cegedim Healthcare Solutions** implementation team. The **Vision360** login screen displays:


2. Enter your details in the **User Name** and **Password**.

**Note**- Your **User Name** is your NHS email address, for **Vision 3** users your password is your existing password, for English sites this is your offline password.

3. Select **Sign In**.
4. Select your **Organisation** from the available list.
5. Select **Sign In**.

**Note** - If you have forgotten your password, for **Vision 3** users, this must be reset in **Vision 3**, for **non-Vision 3** users it can be reset by your systems administrator.

6. The **Vision360** screen displays, select **Appointments**  and the **Appointments** screen displays:


# Selecting 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.

The selected patient's demographics display in the **Patient Banner**: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**Note** - If you already have a patient open and you select a different patient, the currently selected patient record closes.

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## Running a Basic Patient Search

1. From **Vision360 Shared Appointments**, select **Select Patient** 

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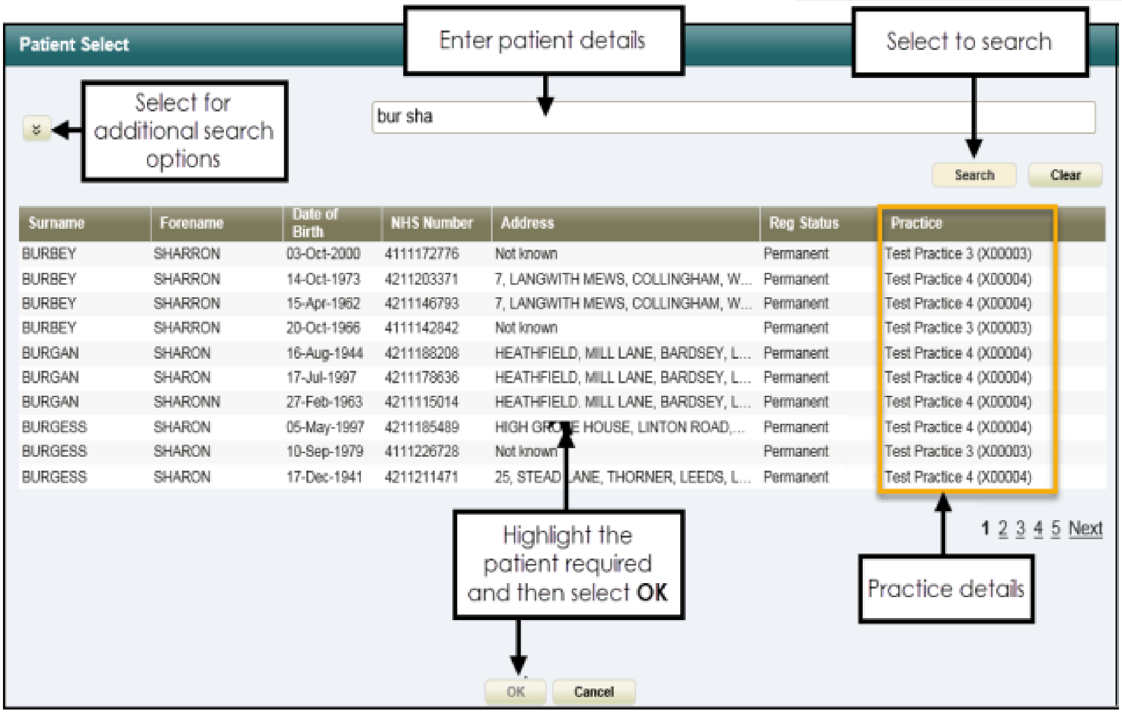
2. In **Search Criteria**, enter all or part of the patient's surname, optionally forename and/or date of birth:

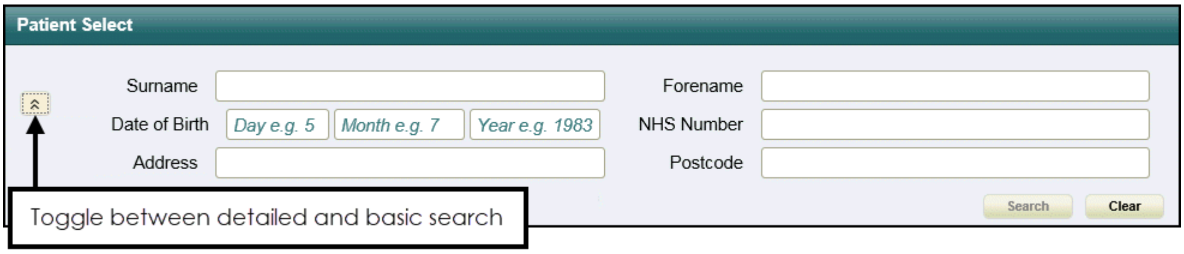



3. Select **Search**.
4. Highlight the patient required and select **OK**.

## Running a Detailed Patient Search

To run a detailed patient search:

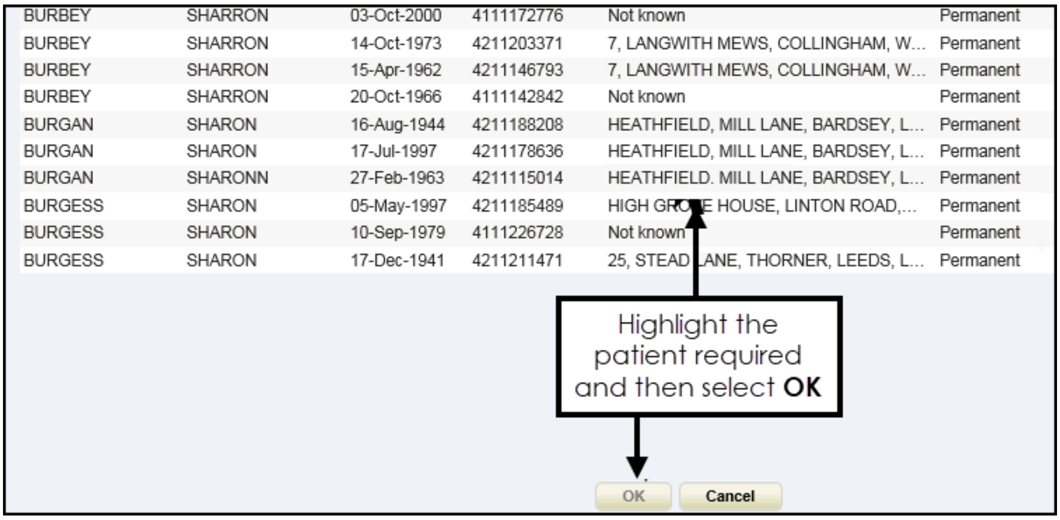
1. From **Vision360 Shared Appointments**, select **Expand**  to display more search options,
   including **Address**, **Postcode** and **NHS/CHI Number**:




2. Enter patient details.

   **Note** - To search by postcode, you must enter a minimum of two characters in **Postcode**.

3. Select **Search**.
4. Highlight the patient required and select **OK:**



| | | | | | |
|---|---|---|---|---|---|
| BURBEY | SHARRON | 03-Oct-2000 | 4111172776 | Not known | Permanent |
| BURBEY | SHARRON | 14-Oct-1973 | 4211203371 | 7, LANGWITH MEWS, COLLINGHAM, W... | Permanent |
| BURBEY | SHARRON | 15-Apr-1962 | 4211146793 | 7, LANGWITH MEWS, COLLINGHAM, W... | Permanent |
| BURBEY | SHARRON | 20-Oct-1966 | 4111142842 | Not known | Permanent |
| BURGAN | SHARON | 16-Aug-1944 | 4211188208 | HEATHFIELD, MILL LANE, BARDSEY, L... | Permanent |
| BURGAN | SHARON | 17-Jul-1997 | 4211178636 | HEATHFIELD, MILL LANE, BARDSEY, L... | Permanent |
| BURGAN | SHARONN | 27-Feb-1963 | 4211115014 | HEATHFIELD. MILL LANE, BARDSEY, L... | Permanent |
| BURGESS | SHARON | 05-May-1997 | 4211185489 | HIGH GROVE HOUSE, LINTON ROAD,... | Permanent |
| BURGESS | SHARON | 10-Sep-1979 | 4111226728 | Not known | Permanent |
| BURGESS | SHARON | 17-Dec-1941 | 4211211471 | 25, STEAD LANE, THORNER, LEEDS, L... | Permanent |



## Deselecting a Patient

You can deselect the patient in displaying in the Patient Banner by either:

- Selecting another patient, or
- Selecting **Close Patient** .

# Booking an Appointment – Reception View

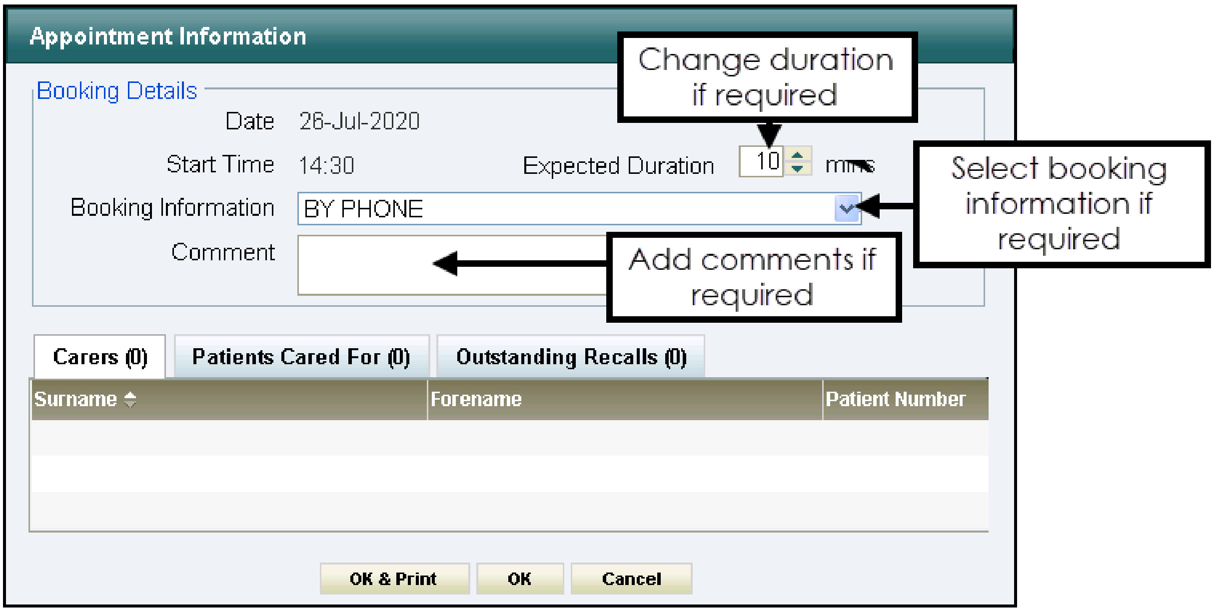
To book an appointment from the **Reception** view:

1. From **Vision360 Appointments** .
2. Select **Reception** and the **Reception** view displays.
3. Select the correct **Organisation** if appropriate.
4. Select the slot you want to book and select **Make booking** , you can also double click into the slot to select it.
5. The **Patient Select** screen displays, select the patient required.

**Note** - Appointments for patients who are registered at an EMIS practice with no sharing agreement, are booked as special bookings with demographic information populated.

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

6. The **Appointment Information** screen displays:



8. Update the booking form if required:
   - **Expected Duration** - Update if required.
   - **Booking Information** - Select if appropriate, the available list is set up in **Vision 3**.
   - **Comments** - Enter any comments required.

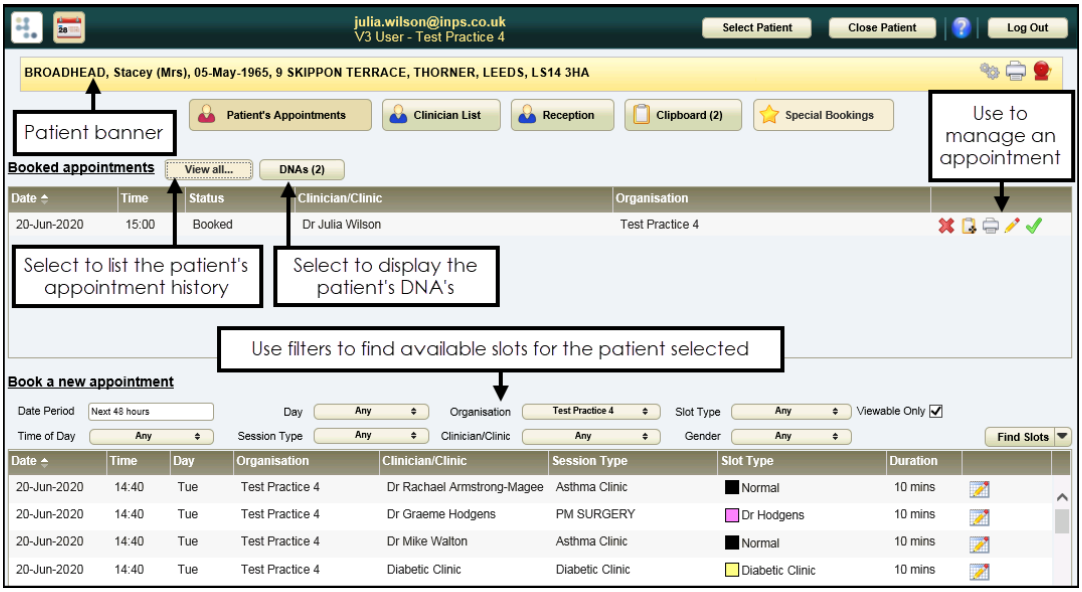
   The following information displays for reference purposes only:
   - **Date** - The selected appointment date.
   - **Start Time** - The selected appointment time.
   - **Carers** - Lists all carers the patient has. Displays name and NHS number if the carer is a patient at the same practice.
   - **Patients Cared For** - Lists all patients, registered at the same practice, that this patient cares for.
   - **Outstanding Recalls** - Lists any outstanding recalls.
9. Select **OK** to book the appointment, or **OK & Print** to book the appointment and issue an appointment card.
10. A booking confirmation message displays:

# Booking an Appointment – Patient View

To book an appointment from the **Reception** view:

1. From **Vision360 Appointments** .
3. Choose **Select Patient** 

and find the patient you require and the **Patient's Appointments** view displays:



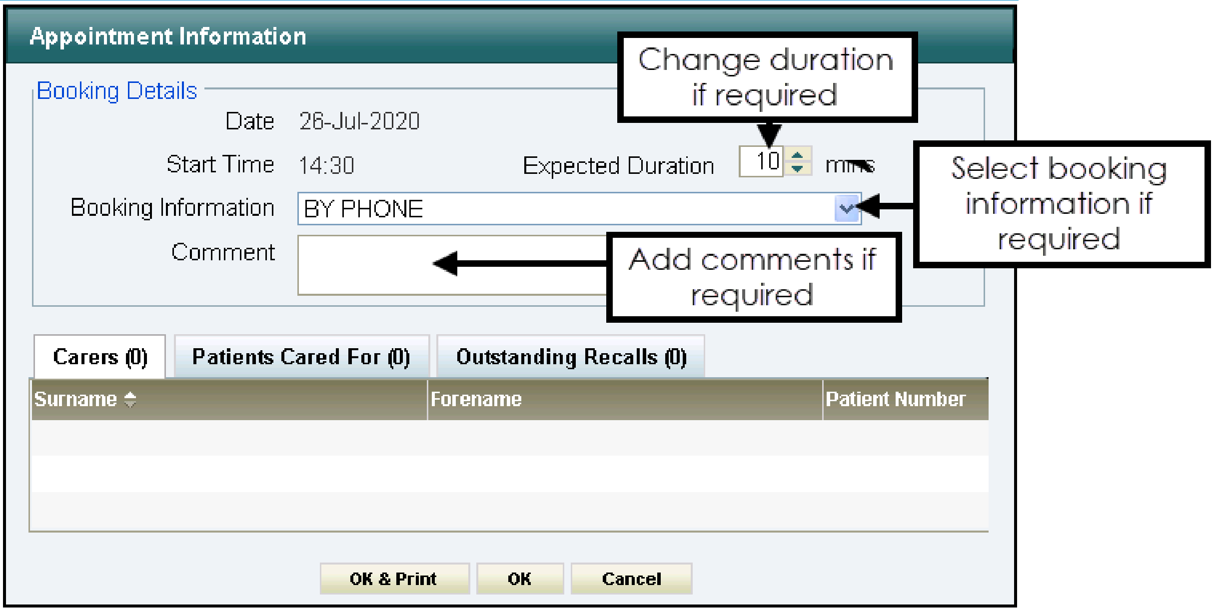

4. In the **Book a new appointment** section, use the filters to refine the available appointments offered, or select **Find Slots** 

and select the search you want to run:
   - **Date period** - Select a time span for the appointment.
   - **Day** - Select a day.
   - **Organisation** - Select which service the appointment is for.
   - **Slot Type** - Select a slot type, for example COVID VACS.
   - **Time of Day** - Select a time of day.
   - **Session Type** - Select a session type, for example, flu clinic.
   - **Clinician/Clinic** - Select specific clinician(s) or clinic(s).
   - **Gender** - The gender of the clinician.
     - **Viewable Only** - This hides slots that are marked as non-viewable.
5. The list of available slots displays. By default appointments display in date/time order, select a column header to re-order that column.

**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'.

6. Highlight the slot required and select **Make booking**, or simply double click it and the **Appointment Information** screen displays:

**Note** - Inactive slots display, they display with a black slot type and should not be booked.




7. Update the booking form if required:
   - **Expected Duration** - Update if required.
   - **Booking Information** - Select if appropriate.
   - **Comments** - Enter any comments required.
9. Select **OK** to book the appointment, or **OK & Print** to book the appointment and issue an appointment card and a booking confirmation message displays:

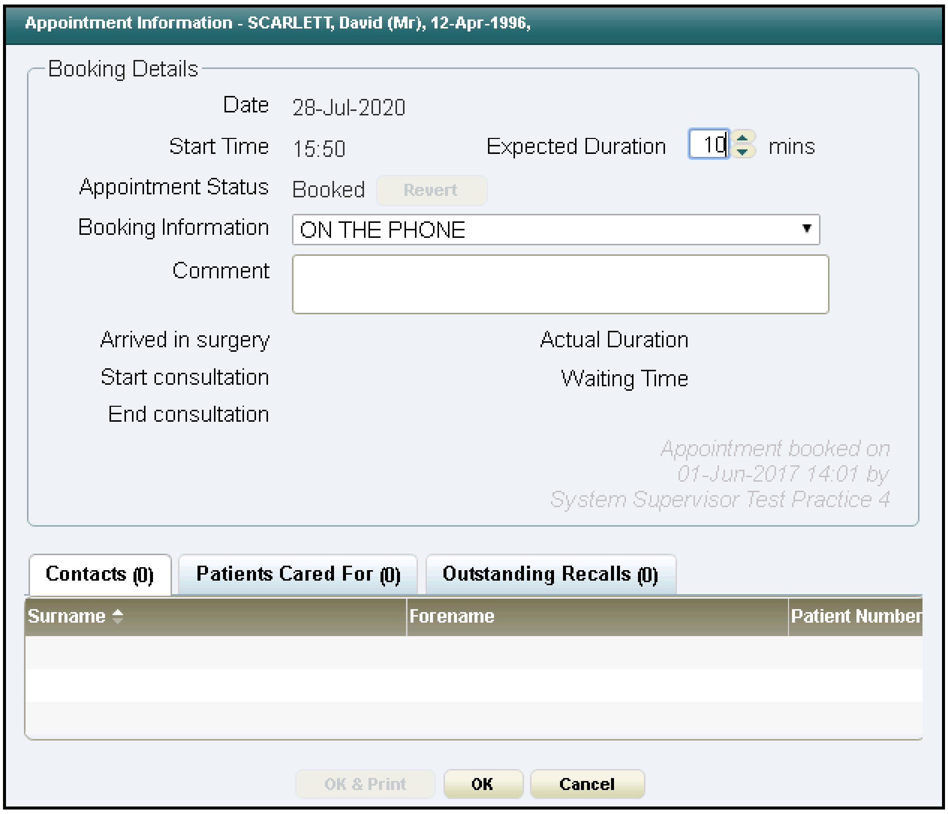
# Editing an Appointment

You can edit patient appointments in **Patient's Appointments** and **Reception** views.

1. From:

   - **Patient Appointments** - **Booked appointments** select **Edit** .
   - The **Reception view**, highlight the appointment and select **Edit** .

   The **Appointment Information** screen displays:




3. Update the booking as required:
   - **Expected Duration** - Change the length of the appointment. A warning displays is the new length overlaps another appointment.
   - **Revert** - Select to return the status of an appointment to a previous state, for example, from **Arrived** back to **Booked**, or from **In Consultation** to **Arrived**.
   - **Comment** - Enter any text required.
4. Select **OK** to save.

**Note** - You can also move an appointment to the Clipboard for re-scheduling later, see **Move Item to Clipboard** for details.

# Making a Special Booking

Special Bookings enable you to make appointments for:

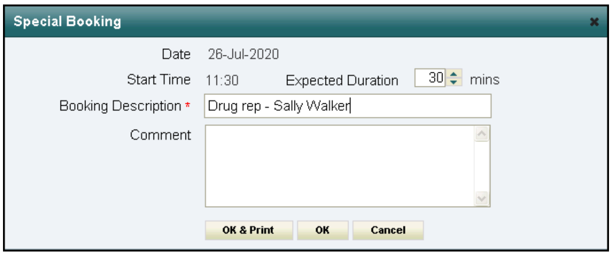
- Non-registered patients.
- Non-patient appointments, for example, an appointment with a drug rep.
- In a shared care setting, patients who are registered at an **EMIS** practice, without a sharing agreement in place, are automatically booked as special bookings with all demographic information populated.

To making a special booking:

1. From **Vision360 Appointments** , select **Special Bookings** .
2. In the **Book a new appointment** section, select the **Organisation**.
3. Apply filters using the dropdown boxes if required.
4. Select **Find Slots** Find Slots and matching slots display. The list of available slots is ordered by date and time. If you select another column to sort by, the date and time 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. Highlight the appointment required and select **Make booking**.
6. The **Special Booking** form displays, enter a description in **Booking Description**:




7. Optionally, enter contact details in **Comment**.
8. Select **OK** to save, or **OK & Print**, to print a label.
9. The booking confirmation message displays:


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

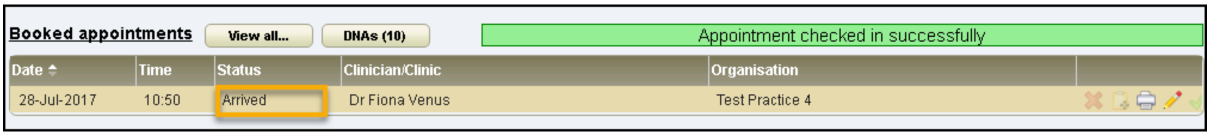
The booking displays in the **Reception** and **Clinician List** view, indicated by **Special Booking** .

# Checking a 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 and the **Patient's Appointments** view displays.
2. Locate today's appointment in the **Booked appointments** list, and select **Check In** . The status updates to **Arrived** and the confirmation message displays:




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

The **Arrived in Surgery** time records and displays in the **Appointment Information** booking screen.

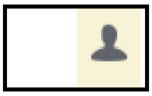
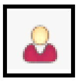
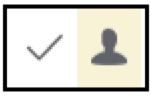
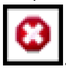
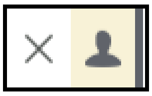
## Reception View

1. Select **Reception** and the **Reception** view displays.
2. Select the relevant organisation from the **Organisation** list.
3. Select the clinic/clinicians using **View**.
5. Locate the booked appointment and double-click the slot to check the patient in.

The status changes to **Arrived** and the confirmation displays:

# Patient Status

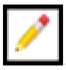
The **Clinician** and **Reception** views use the following symbols to represent the patient status.

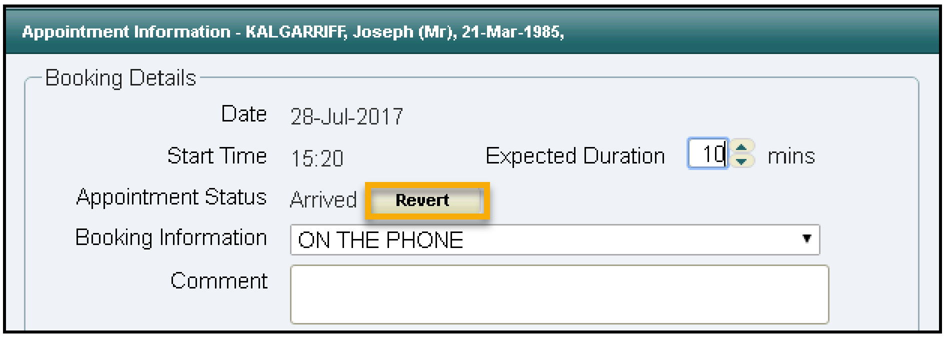
-  - **Booked Appointment**.
-  - **Patient Arrived**.
-  - **Patient in Consultation**, status updates automatically when a clinician starts a consultation.
-  - **Patient Seen**, status updates when a consultation is opened with the next patient, or this can be ended manually by selecting **End Appointment** .
-  - **DNA**, if the patient is not checked in, and their appointment time has lapsed, the status updates to DNA.

**Training Tip** - If updated in error, a patient status can be reverted.

# 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 and the **Patient** view displays.
2. From the **Booked Appointments** section, locate the appointment you want to edit and select **Edit Appointment** .
3. From the **Appointment Information**, select **Revert** to revert the appointment status to **Booked**:




4. Select **OK** to save.