

Vision Shared Appointments Quick Reference Guide for Reception Staff

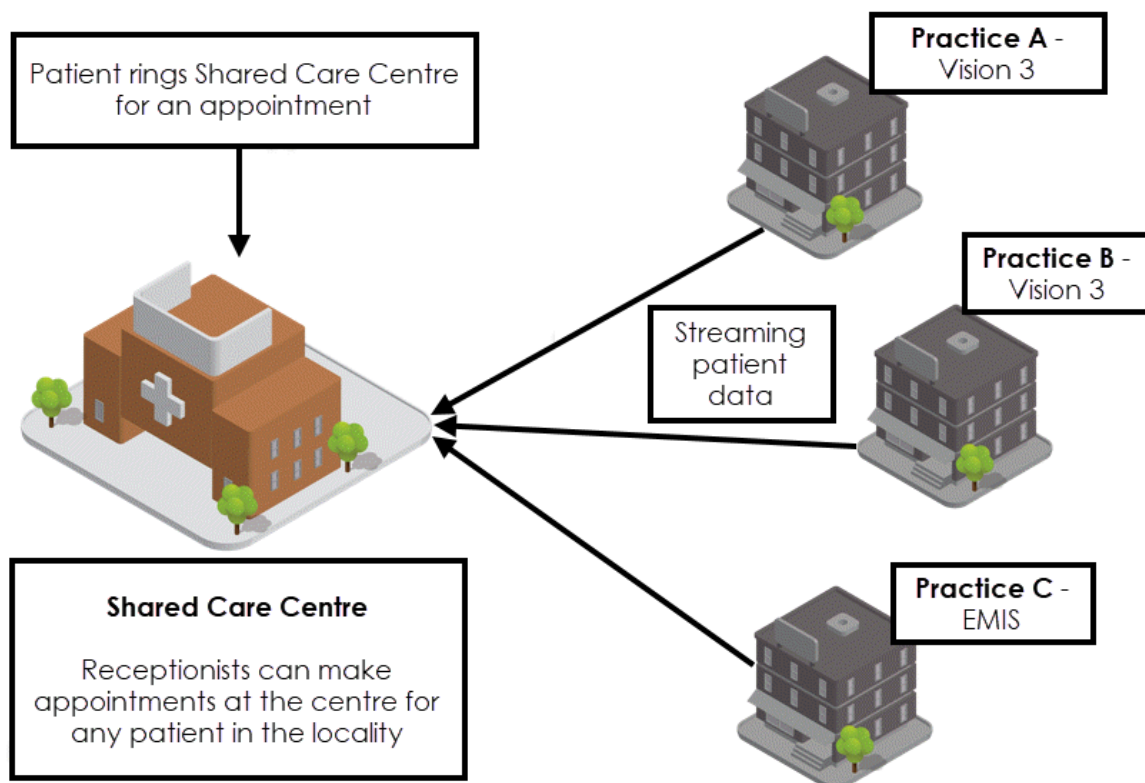
Vision 3 Shared Appointments allows for the sharing of appointments books beyond the practice boundary. Using **Shared Appointments** you can view, book and cancel patient appointments for a Shared Care service.

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:

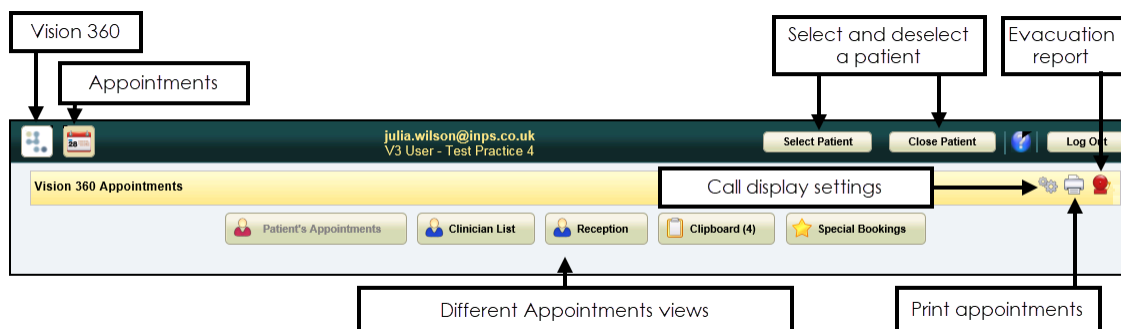
- A patient can, for example, contact their practice for an appointment, and if one isn't available then the practice can book the patient into the Shared Care Centre.
- Alternatively, a patient can contact the Shared Care Centre directly, and the receptionist can book an appointment at the centre for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



Home Screen Overview

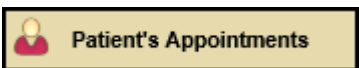


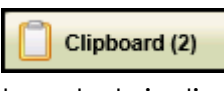



From the Shared Appointments Home screen you can:

- 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**  - Displays the appointments booked for the patient, you can also book new appointments and manage existing bookings.
- **Clinician List**  - Displays appointments by clinician/clinic including appointment comments.
- **Reception**  - Displays multiple clinician/clinic books.
- **Clipboard**  - Allows you to move bookings, the number in brackets indicates the count of appointments on the clipboard.
- **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**:



Note - If you already have a patient open and you select a different patient, the currently selected patient record closes.

Running a Basic Patient Search

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

Patient

Select Patient

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

Patient Select

Enter patient details

bur sha

Select to search

Search Clear

Select for additional search options

▼

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	SHARONN	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)

Highlight the patient required and then select OK

OK Cancel


Practice details

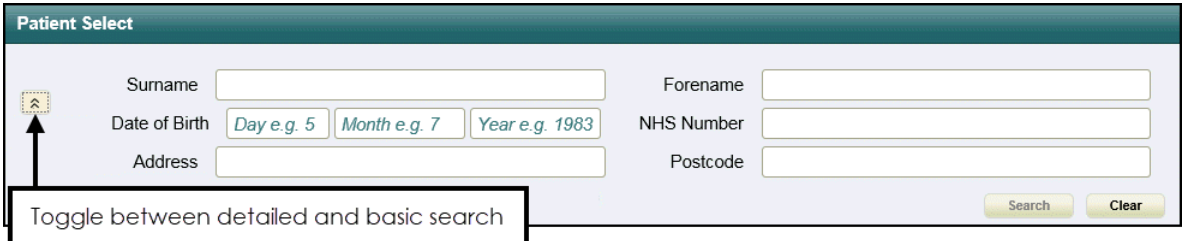
1 2 3 4 5 Next

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**:



The 'Patient Select' form contains the following fields:

- Surname:
- Forename:
- Date of Birth: Day e.g. 5 Month e.g. 7 Year e.g. 1983
- NHS Number:
- Address:
- Postcode:
- Search:
- Clear:

A callout box points to a small icon in the top left corner of the form, stating: "Toggle between detailed and basic search".

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
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BURGAN	SHARON	17-Jul-1997	4211178636	HEATHFIELD, MILL LANE, BARDSEY, L...	Permanent
BURGAN	SHARRON	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

A callout box points to the row for SHARRON, 17-Dec-1941, stating: "Highlight the patient required and then select OK".

At the bottom of the table are two buttons: and .

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.

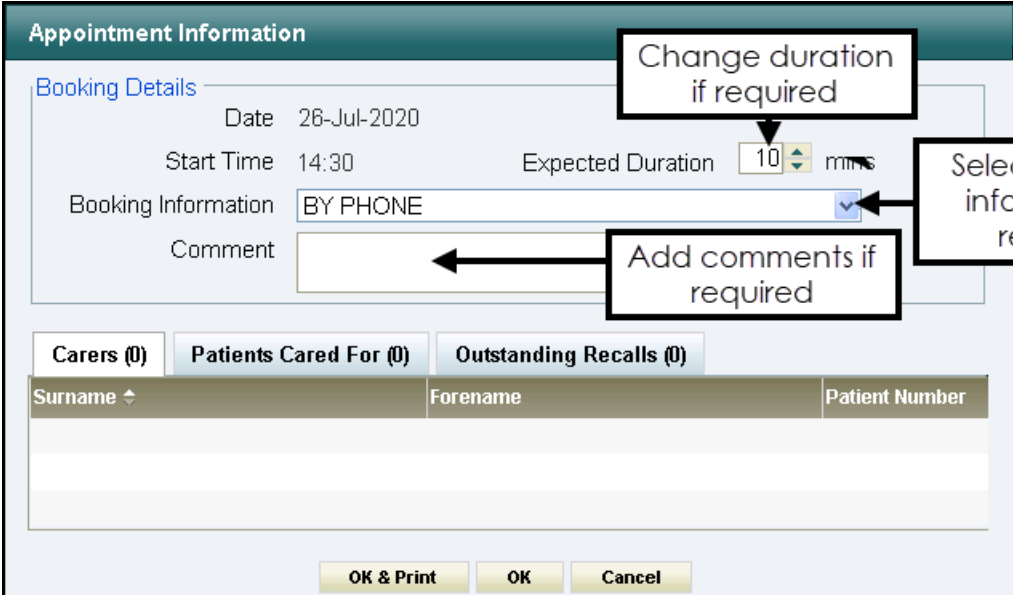


Note - Appointments for patients who are registered at an EMIS practice with no sharing agreement, are booked as special bookings with demographic information populated.



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:



The screenshot shows the **Appointment Information** screen. It includes a **Booking Details** section with fields for Date (26-Jul-2020), Start Time (14:30), Expected Duration (10 mins), Booking Information (BY PHONE), and a Comment field. Annotations with arrows point to the Expected Duration field (labeled 'Change duration if required'), the Booking Information dropdown (labeled 'Select booking information if required'), and the Comment field (labeled 'Add comments if required'). Below the details are tabs for **Carers (0)**, **Patients Cared For (0)**, and **Outstanding Recalls (0)**. A table with columns Surname, Forename, and Patient Number is shown below the tabs. At the bottom are buttons for **OK & Print**, **OK**, and **Cancel**.

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:

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

Booking an Appointment – Patient View

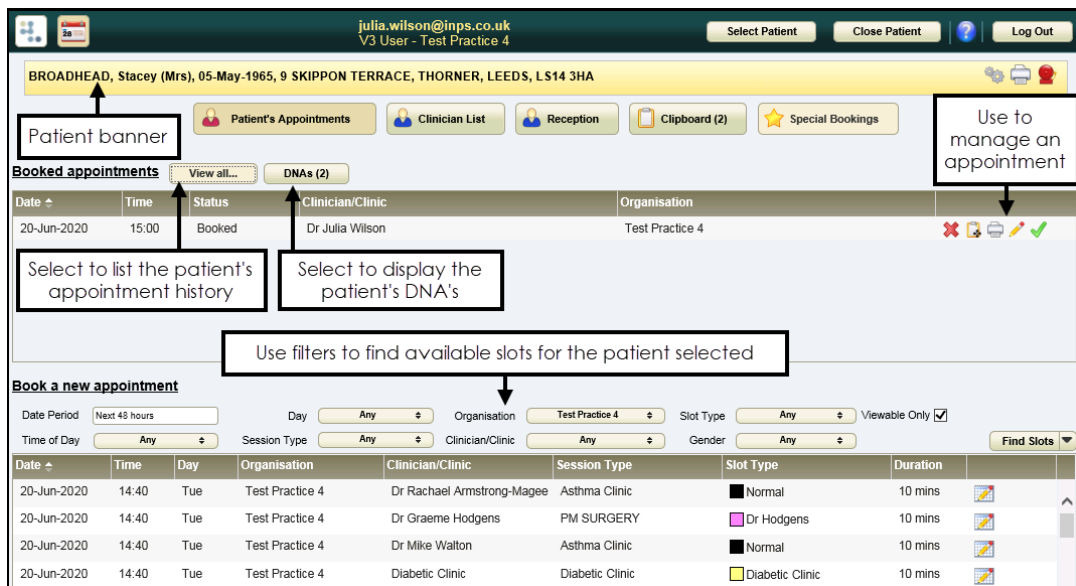
To book an appointment from the **Reception** view:



1. From **Vision360 Appointments**

Select Patient

3. Choose **Select Patient** and find the patient you require and the **Patient's Appointments** view displays:



Patient banner

Booked appointments

Date	Time	Status	Clinician/Clinic	Organisation
20-Jun-2020	15:00	Booked	Dr Julia Wilson	Test Practice 4

DNAs (2)

Use filters to find available slots for the patient selected

Book a new appointment

Date Period: Next 48 hours

Time of Day: Any

Day: Any

Session Type: Any

Organisation: Test Practice 4

Clinician/Clinic: Any

Slot Type: Any

Gender: Any

Viewable Only: ☒


Find Slots

Date	Time	Day	Organisation	Clinician/Clinic	Session Type	Slot Type	Duration
20-Jun-2020	14:40	Tue	Test Practice 4	Dr Rachael Armstrong-Magee	Asthma Clinic	Normal	10 mins
20-Jun-2020	14:40	Tue	Test Practice 4	Dr Graeme Hodgens	PM SURGERY	Dr Hodgens	10 mins
20-Jun-2020	14:40	Tue	Test Practice 4	Dr Mike Walton	Asthma Clinic	Normal	10 mins
20-Jun-2020	14:40	Tue	Test Practice 4	Diabetic Clinic	Diabetic Clinic	Diabetic Clinic	10 mins


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:

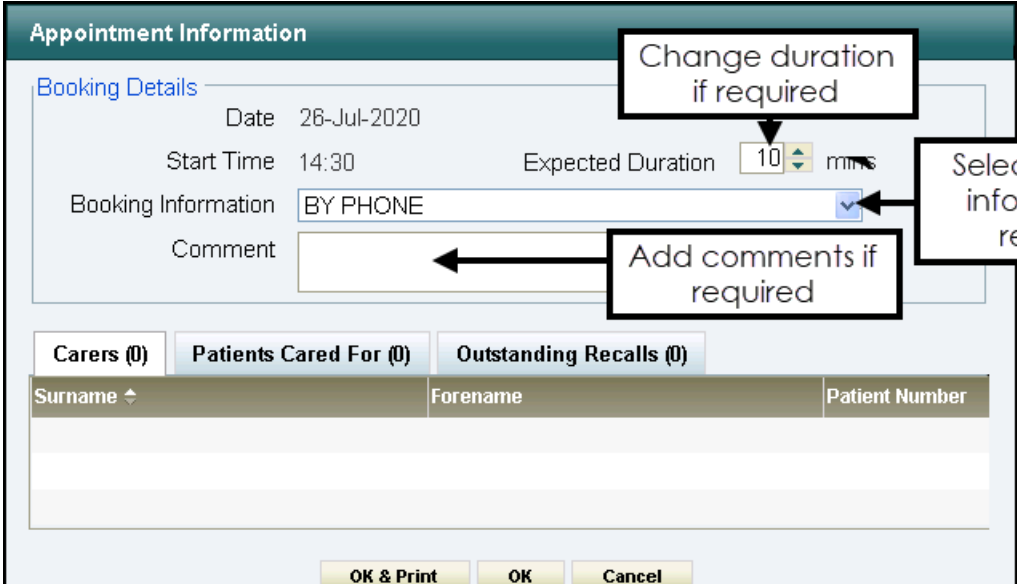
- **Date period** - Select a time span for the appointment.
- **Day** - Select a day.
- **Organisation** - Select which service the appointment is for.
- **Slot Type** - Select a slot type, for example COVID VACS.
- **Time of Day** - Select a time of day.
- **Session Type** - Select a session type, for 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.



The screenshot shows the 'Appointment Information' screen. It includes a 'Booking Details' section with fields for Date (26-Jul-2020), Start Time (14:30), Expected Duration (10 mins), Booking Information (BY PHONE), and a Comment field. Below this are three tabs: 'Carers (0)', 'Patients Cared For (0)', and 'Outstanding Recalls (0)'. At the bottom are buttons for 'OK & Print', 'OK', and 'Cancel'. Three callout boxes with arrows point to specific fields: 'Change duration if required' points to the Expected Duration field, 'Add comments if required' points to the Comment field, and 'Select booking information if required' points to the Booking Information dropdown.



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:

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

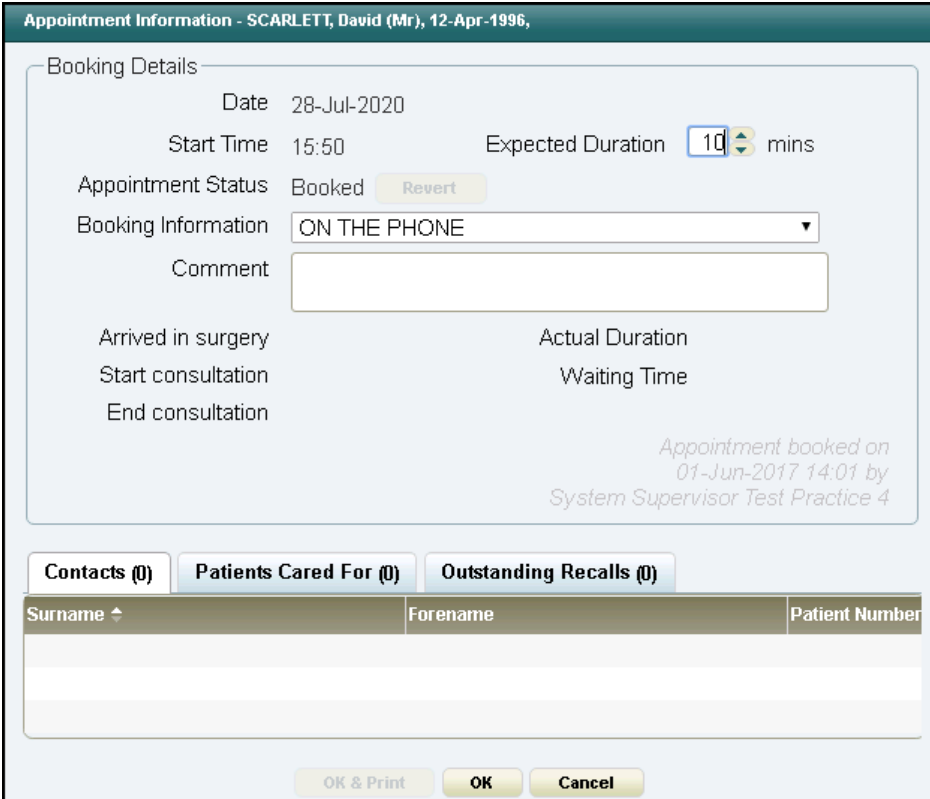
Editing an Appointment

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:



Appointment Information - SCARLETT, David (Mr), 12-Apr-1996,

Booking Details

Date 28-Jul-2020

Start Time 15:50 Expected Duration mins

Appointment Status Booked **Revert**

Booking Information ON THE PHONE

Comment

Arrived in surgery Actual Duration

Start consultation Waiting Time

End consultation

Appointment booked on 01-Jun-2017 14:01 by System Supervisor Test Practice 4

Contacts (0) Patients Cared For (0) Outstanding Recalls (0)

Surname	Forename	Patient Number

OK & Print OK Cancel

3. Update the booking as required:

- **Expected Duration** - Change the length of the appointment. A warning displays if 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:

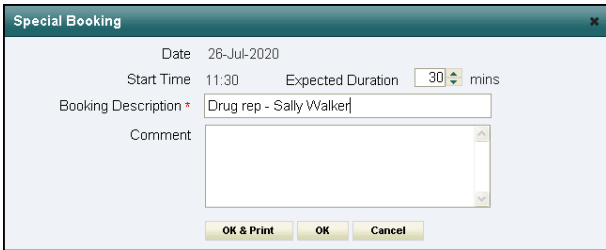
- Non-registered patients.
- Non-patient appointments, for example, an appointment with a drug rep.
- In a shared care setting, patients who are registered at an **EMIS** practice, without a sharing agreement in place, are automatically booked as special bookings with all demographic information populated.

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**  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**:



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

- Date:** 26-Jul-2020
- Start Time:** 11:30
- Expected Duration:** 30 mins
- Booking Description:** Drug rep - Sally Walker
- Comment:** (Empty text area)

Buttons at the bottom: OK & Print, OK, Cancel.

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:

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


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:

Booked appointments		View all...	DHAs (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.

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:

Appointment checked in successfully

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.

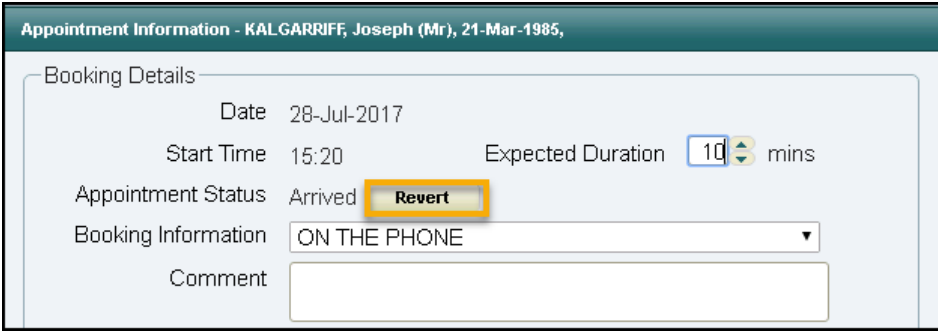


Training Tip - If updated in error, a patient status can be reverted.

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**:



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

4. Select **OK** to save.