

My Health Online Appointments

User Guide

Version 3

13 April 2021



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My Health Online Appointments

What's New?

- **April 2021** – Guide update and rebrand.

Introduction

My Health Online (MHOL) Appointments enables you to create a website accessible by patients to book, check and cancel appointments. You determine which appointment slots are available online and can customise how your patient's use the service. You are responsible for allowing patients access and you can disable online services for patients you feel are abusing the service.

The benefits of online appointments are:

- The easing of demand on a busy reception.
- Patients no longer having to queue in person or on the telephone to manage their appointments.
- Allowing patients to manage their appointments outside of surgery hours.
- Patients can access their appointments wherever they have internet access.
- The reduction of DNA's by making it easier for patients to cancel or reschedule their own appointments.

This user guide details the use and setup of **My Health Online Appointments**.

Overview of Enabling Online Appointments

My Health Online (MHOL) is installed on your system via **Down Line Manager (DLM)** and then needs to be configured and setup by **Cegedim Healthcare Solutions (CHS)** prior to using the product.

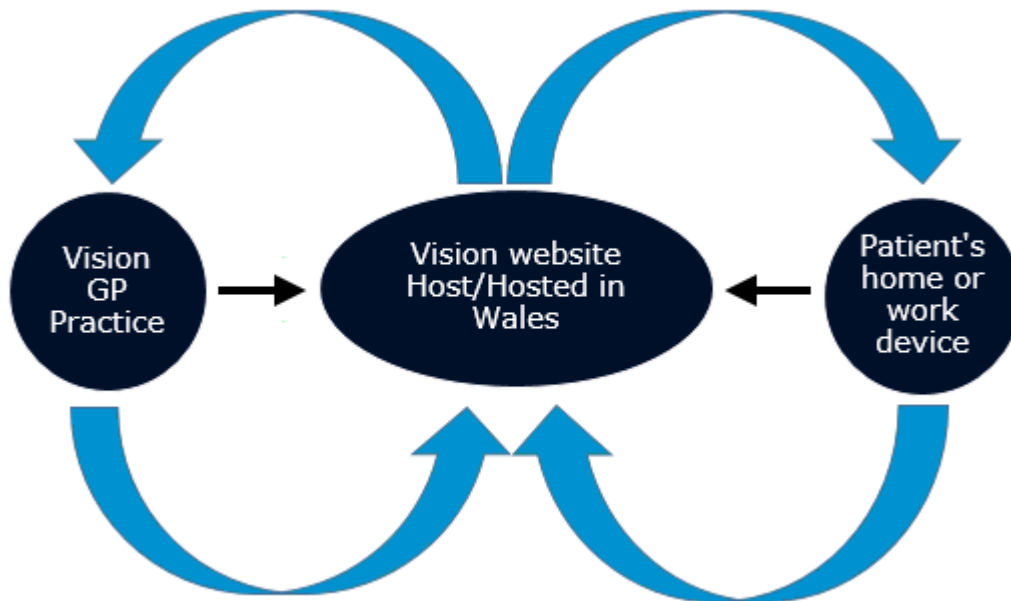
To enable online appointments you must:

- **Enable Online Appointments** - You need to enable and configure online services, see [Enabling Online Appointments](#) (page 7) for details.
- **Register patients for online services** - You need to register patients for online services and print out their Registration Confirmation Letter, see [Patient Registration](#) (page 47) for details.
- **Appointment Session Setup** - You may need to amend appointment sessions, especially if **Appointments** is used by one or more branch surgeries, see [Session Setup](#) (page 23) for details.
- **Reserve Slots for use online** - You must determine which appointments patients have access to online and reserve related appointment slots, see [Configure Slot Type & Reserve Slots for Web Use](#) (page 29) for details.
- **Appointment Cancellation Messages** - You must add/review **Appointment Cancellation** messages for use online, see [Cancellations Tab](#) (page 13) for details.

 **Note** - The **My Health Online** website is not always available 24 hours per day. It may be unavailable, for example, when the website is being updated.

Flow of Information

The following diagram demonstrates how the information flows between the practice, patient and the Vision hosted server:



Online Appointments (Practice)

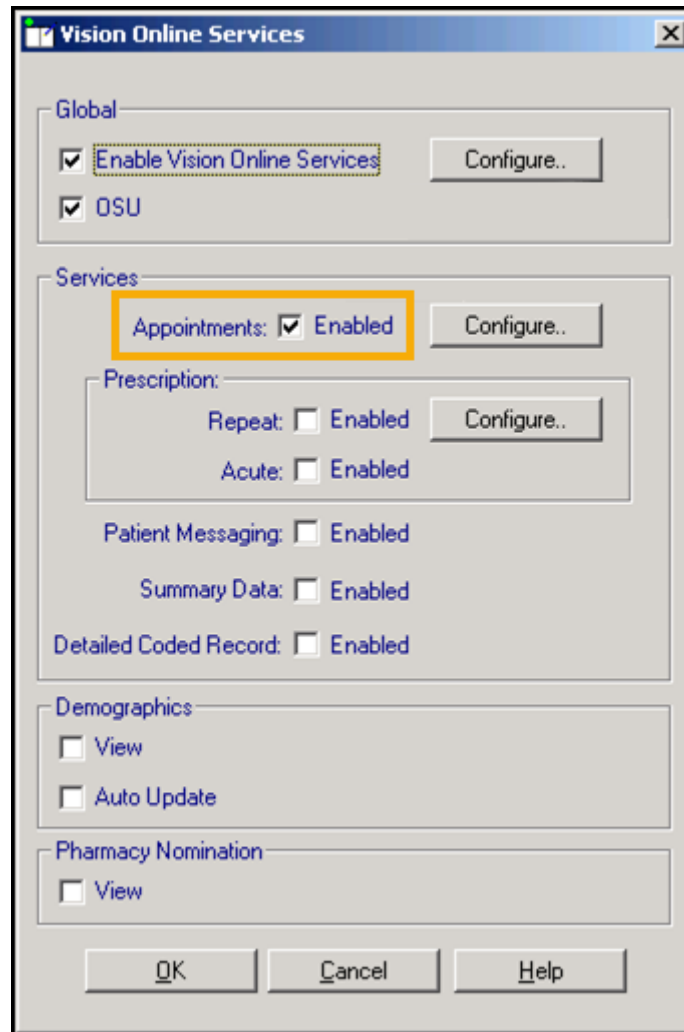
Enabling Online Appointments

To activate online Appointments:

1. From **Management Tools**, select **Control Panel – File Maintenance –**



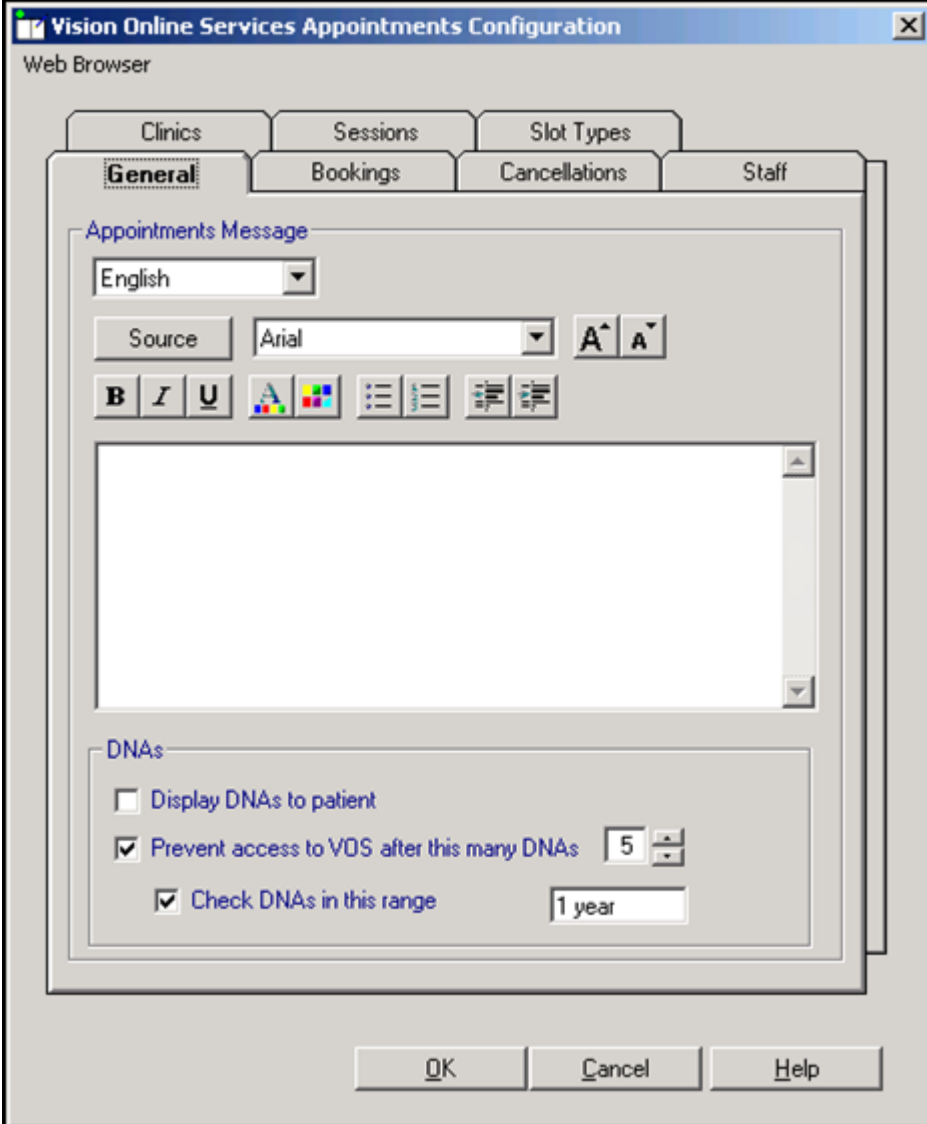
2. Tick **Appointments**:



3. Select **Configure** to customise how appointments works for your practice, see [Configure Online Appointments](#) (page 7).

Configure Online Appointments

You need to determine which staff and sessions you want to be available from the **My Health Online** website and setup how you want online appointments to work for you. There are seven tabs that should be considered:



Once you have considered and completed all seven tabs as required, select **OK** to save and close the **Vision Online Services Appointments Configuration** screen.



Remember - You need to revisit **Appointments Configuration** when a new clinician joins or leaves your practice.

General Tab

The **General** tab enables you to setup the following:

- **Appointments Message**, see [Add Appointments Message](#).
- **Did Not Attend (DNA)**, see [DNA's](#).

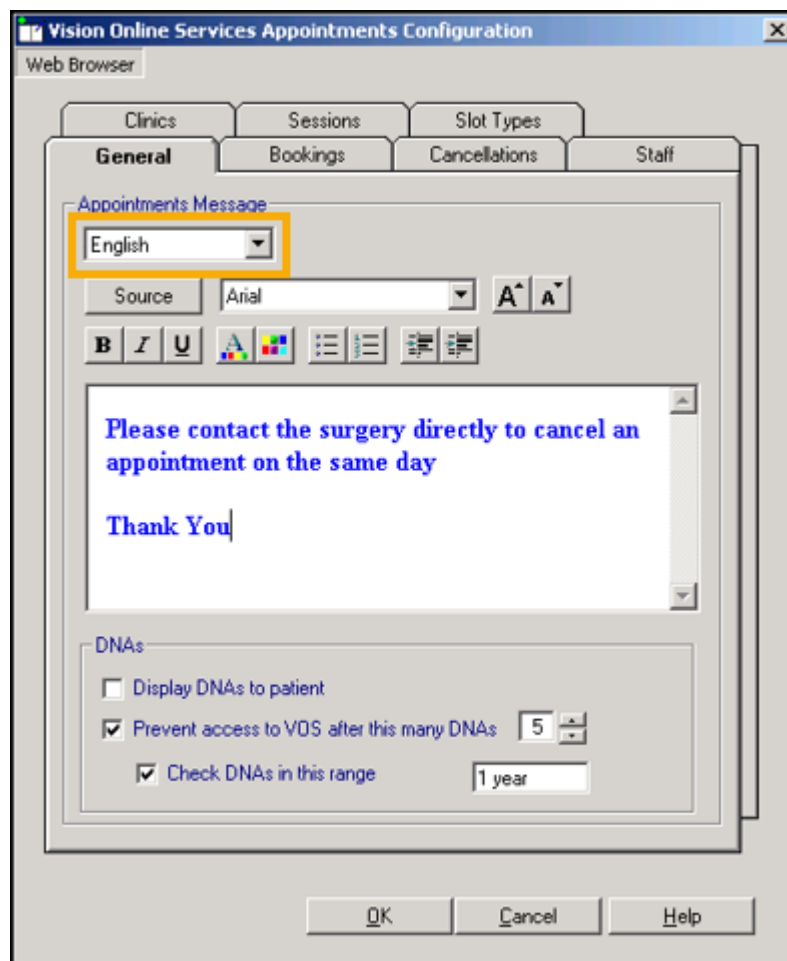
Add Appointments Message

The **Appointments Message** is a practice specific message that displays on each page of the **Appointments** website. Consider using the content of the message to direct patients in how to use the service and who to contact should they have an issue.

To add an Appointment Message:


1. From **Online Services Appointments Configuration** select the **General** tab.
2. Type your message in the **Appointments Message** window using the formatting editor provided.

If you prefer, you can customise your message source using HTML formatting tags, see [Formatting HTML Messages](#) (page 10).



3. Now select **Welsh** from the language option and repeat the above steps for those patients that choose to view **My Health Online** in Welsh.

4. Select **OK** to save

 **Note** - To help prevent confusion surrounding who to contact if your patients have a problem, we ask that you add the following to your **Appointment welcome message**: 'In the case of a query regarding booking or cancelling an appointment please contact the surgery in the usual way'.

Formatting HTML Messages

Messages can be formatted using HTML formatting tags. HTML tags are:

- Used either side of a keyword eg <html> you wish to format.
- The tag always has angle brackets eg <html> denoting the starting and closing of the tag.
- HTML tags normally come in pairs eg (the starting tag) and (the closing tag)
- You can use multiple tags, but each tag must have brackets at the start and end of the tag eg <p>

This is a list of the most common codes:


Starting Tag	Closing Tag	Description
<h1>	</h1>	First Heading. Headings can be defined with <h1> to <h6> tags. <h1> is the largest heading and <h6> is the smallest.
<p>	</p>	Paragraph
		Bold text
<big>	</big>	Big text
<i>	</i>	<i>Italic text</i>
<small>	</small>	Small text
_		<small>Subscript</small> text
[]	^{Superscript} text
 		This tag adds a single line break, it does not need a closing tag.

For example applying the bold tag to the 1st line of the message like this:

- Welcome to the Visionary Healthcare Practice

Displays as:

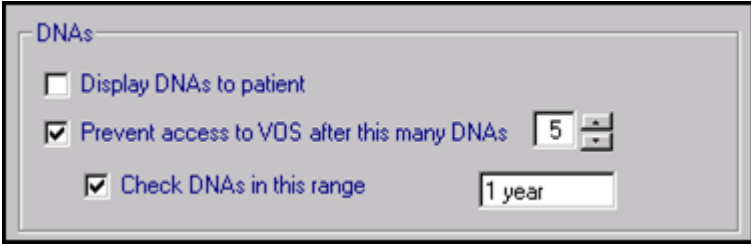
- **Welcome to the Visionary Healthcare Practice**

 **Note** - If you want to add an image to your message, you must link to an image which can be accessed over the internet and not one stored locally. Locally stored images cannot be displayed on the website.

Did Not Attends (DNA's)

You can help manage DNA's within online appointments, the options are:

- **Display DNA to patients.**
- **Prevent access to online appointments after this many DNA's.**
- **Check DNA in this range.**



The screenshot shows a configuration panel titled "DNAs" with the following options:

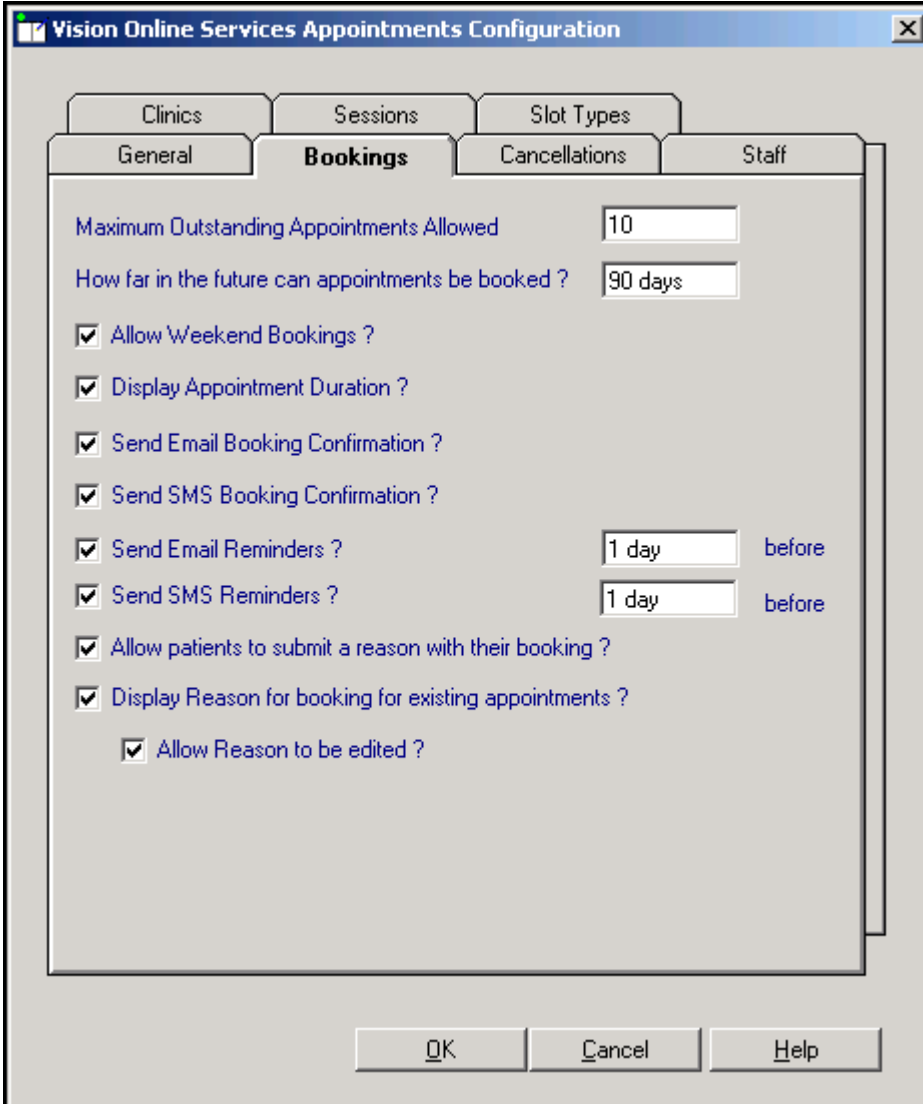
- Display DNAs to patient
- Prevent access to VDS after this many DNAs
- Check DNAs in this range

From **Online Services Appointments Configuration**, select the **General tab - DNAs**.

- Tick **Display DNAs to patient** to enable patients to view their DNA appointments.
- Tick **Prevent access to Online Services after this many DNAs** to limit patients' access after a set amount of DNA (removing the tick disables this function).
- Select a number of how many DNAs are permitted before the user account is disabled.
- Tick **Check DNAs in this range** to specify a date range for the DNA's if required and set a date.

Bookings Tab

The **Bookings** tab allows you to configure existing and new online appointment bookings:



The screenshot shows a configuration window titled "Vision Online Services Appointments Configuration" with a close button (X) in the top right corner. The window has several tabs: "Clinics", "Sessions", "Slot Types", "General", "Bookings" (selected), "Cancellations", and "Staff". The "Bookings" tab is active and contains the following settings:

- Maximum Outstanding Appointments Allowed: 10
- How far in the future can appointments be booked?: 90 days
- Allow Weekend Bookings ?
- Display Appointment Duration ?
- Send Email Booking Confirmation ?
- Send SMS Booking Confirmation ?
- Send Email Reminders ? 1 day before
- Send SMS Reminders ? 1 day before
- Allow patients to submit a reason with their booking ?
- Display Reason for booking for existing appointments ?
- Allow Reason to be edited ?

At the bottom of the window are three buttons: "OK", "Cancel", and "Help".

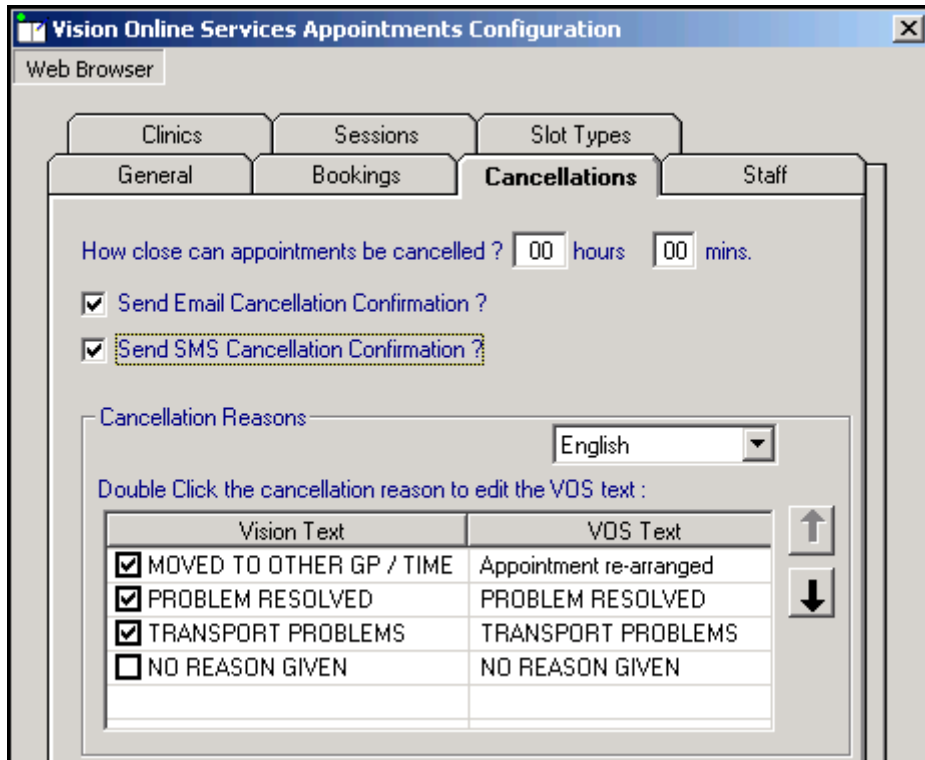
Complete as required:

- **Maximum Outstanding Appointments Allowed** - You need to decide how many outstanding appointments a patient can have booked at any one time. Enter the number of appointments you want to allow. The default is 0 which enables your patients to book unlimited appointments. If the limit is reached (by online or practice booked appointments), the patient receives a message which states: *'You have reached the maximum number of bookings allowed. No further bookings can be made at this time.'*
- **How Far in the Future Can Appointments be Booked** - You need to decide how far in advance online appointments can be booked. Enter the number required, followed by **D** (days), **W** (weeks), **M** (months), or **Y** (years).
- **Allow Weekend Bookings** - If you provide weekend appointments, tick to enable weekends to be available online.
- **Display Appointment Duration** - Tick to display the duration of the appointment being booked to the patient.
- **Send Email Booking Confirmation** - Tick to email active online registered patients confirmation of their appointments, booked online or in the practice.
- **Send SMS Booking Confirmation** - Not currently available via MHOL.
- **Send Email Reminders** - Tick to select and add a time scale stating how long before before the appointment due time the patient is reminded.
- **Send SMS Reminders** - Not currently available via MHOL.
- **Allow patients to submit a reason with their booking?** -Tick to enable your patient to add a freetext comment when booking appointments.
- **Display Reason for booking for existing appointments?** - Tick to enable your patients to view the booking reasons for existing appointments booked at the practice.
- **Allow Reason to be edited?** - Tick to allow patients to edit the reason for booking.

Cancellations Tab

From the **Cancellations** tab you can:

- Set a time period for cancelling appointments
- Determine if email confirmation messages are sent
- Set cancellation reasons, see [Cancellation Reasons](#) (page 14)



The screenshot shows the 'Cancellations' configuration window. It includes a 'Web Browser' tab, navigation buttons for 'Clinics', 'Sessions', 'Slot Types', 'General', 'Bookings', 'Cancellations', and 'Staff'. The 'Cancellations' section contains the following fields:

- 'How close can appointments be cancelled?' with input fields for '00 hours' and '00 mins'.
- Checkboxes for 'Send Email Cancellation Confirmation?' and 'Send SMS Cancellation Confirmation?' (the latter is highlighted with a dashed border).
- 'Cancellation Reasons' section with a language dropdown set to 'English'.
- A table for editing VOS text for various reasons.

Double Click the cancellation reason to edit the VOS text :	English
Vision Text	VOS Text
<input checked="" type="checkbox"/> MOVED TO OTHER GP / TIME	Appointment re-arranged
<input checked="" type="checkbox"/> PROBLEM RESOLVED	PROBLEM RESOLVED
<input checked="" type="checkbox"/> TRANSPORT PROBLEMS	TRANSPORT PROBLEMS
<input type="checkbox"/> NO REASON GIVEN	NO REASON GIVEN

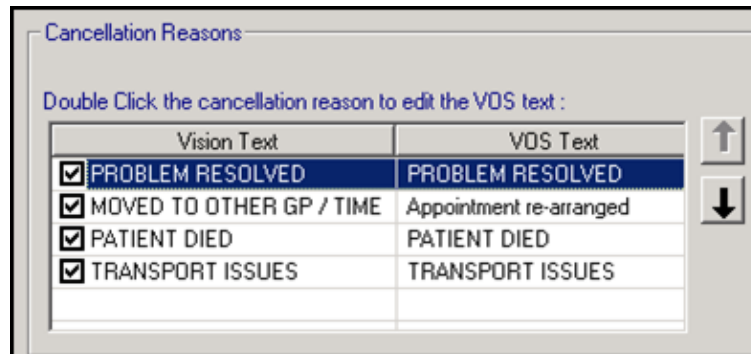
Complete as required:

- **How close can appointments be cancelled?** - To set the cancellation time frame, enter a number of hours and minutes as required. If your patient attempts to cancel an appointment during the cancellation cut-off period they are advised: *'This appointment cannot be cancelled online. Please contact your GP Practice'*.
- **Send Email Cancellation Confirmation** - Tick to send an email if the appointment is cancelled either at the practice or online.
- **Send SMS Cancellation Confirmation** - Not available via MHOL.

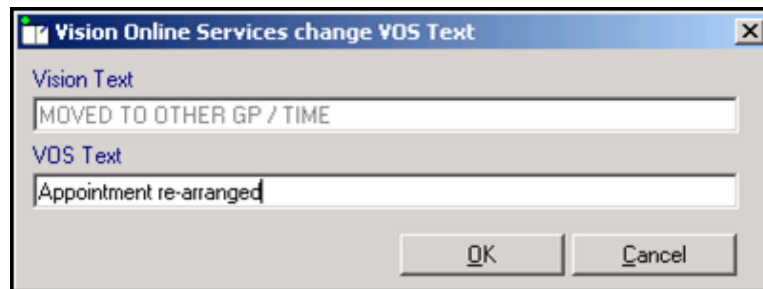
Cancellation Reasons



To maintain your **Cancellation Reasons** for use online:

1. From **Online Services Appointments Configuration - Cancellations** tab, your current Cancellation Reasons display:



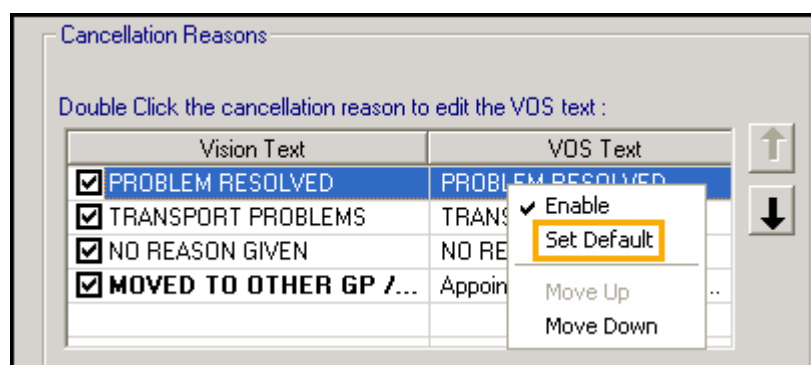
2. Double click the cancellation reason and the **Vision Online Services change VOS Text** screen displays:



3. Enter the text you require and select **OK**.
4. The order the **Cancellation Reasons** display can be changed using the up  and down  arrows. Highlight the reason you wish to move and use the arrows to move it to the required position in the list. To hide a cancellation reason from your patients, remove the tick that proceeds it.

i Important – If all cancellation reasons are deselected (hidden) patients are unable to cancel appointments online.

5. To set one of the cancellation reasons as a default, highlight the required reason and right click, select **Set Default**. The default text is emboldened.



Note - The staff need to be set up as normal in **Control Panel**, **File Maintenance** and **Appointments** for you to be able to add to the **Online Services - Staff** tab.

Staff Tab


The **Staff** tab allows you to decide which clinical staff display in online appointments and are available for your patients to book.

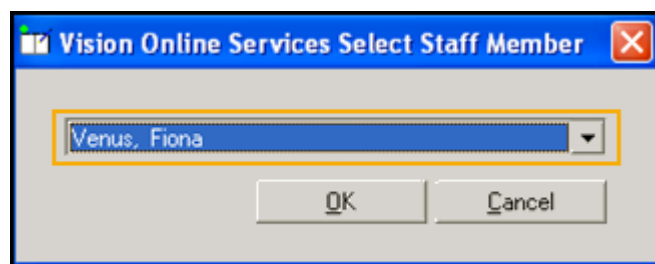
To set up your staff:

1. From the **Vision Online Services Appointments Configuration** screen, select the **Staff** tab.
2. The following options are available:
 - **All Staff** - Displays all active clinical staff listed in **File Maintenance** (including admin staff with clinical role), selected by default. We recommend you do not change this option as it enables any clinical staff member to be available for set up.
 - **Usual GP** - Displays only the patient's **Usual GP**.
 - **Salaried GP** - Displays only those GPs set as **Salaried GPs** in **File Maintenance**.



To setup staff individually

1. From the **Vision Online Services Appointments Configuration** screen, remove the tick from the **All Staff** box.
2. Select **Add** .
3. A list of all clinical staff from the **File Maintenance** list displays.
4. Select the required clinician's name from the list and select **OK**:

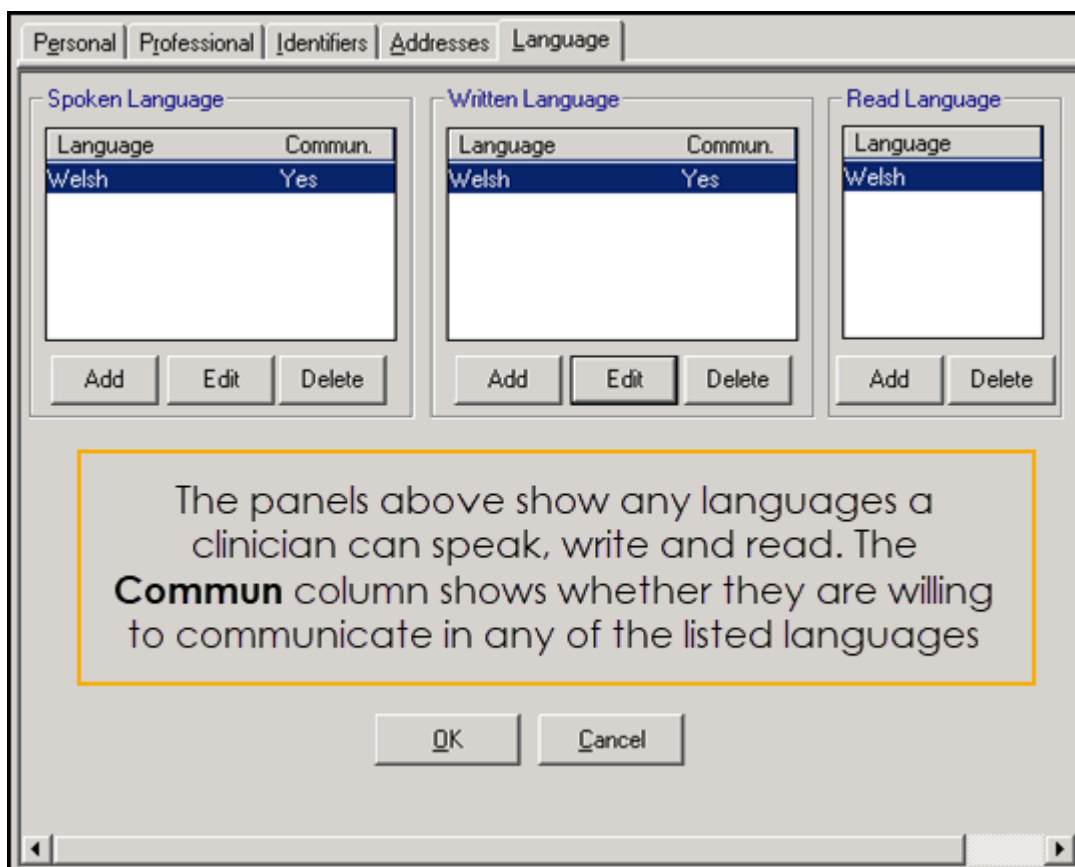


5. Repeat steps 4 - 6 until you have added all the staff that your patients need to be able to book online.
6. Select **Cancel** to finish.

Adding Gender, Special Interests & Language

Gender, Role, Special Clinical Interests and **Written and Spoken languages** of any clinician providing online appointments, displays online. For each clinician selected for online appointments the following should be completed:

1. From **Control Panel - File Maintenance - Staff** select the staff member, right click and select **Edit Staff**.
2. Complete each tab as follows:
 - **Personal** - Select **Sex** and choose the correct gender.
 - **Professional:**
 - Check the **Role** selected is correct.
 - Set the **Main** and **Interest Speciality** from drop down lists.
 - **Language** - Check the **Spoken, Written** and **Read** languages options are complete and correct where added:
 - To add a language if required, select **Add** under the correct section (**Spoken, Written** or **Read**), select from the available list and select **OK**.
3. Select **OK** to save.



The screenshot shows a software window with the following structure:

- Tabbed interface with 'Language' selected.
- Three panels: 'Spoken Language', 'Written Language', and 'Read Language'.
- Each panel contains a table:

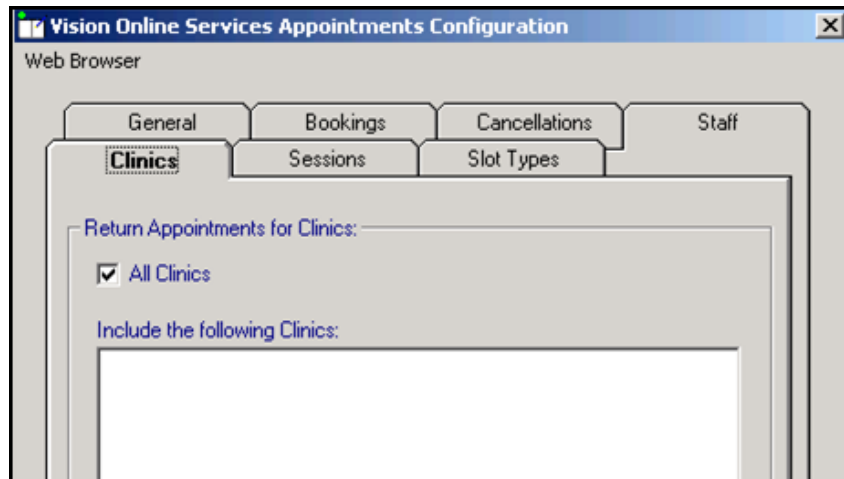
Language	Commun.
Welsh	Yes
- Buttons: 'Add', 'Edit', 'Delete' (under Spoken and Written); 'Add', 'Delete' (under Read).
- Text box: "The panels above show any languages a clinician can speak, write and read. The **Commun** column shows whether they are willing to communicate in any of the listed languages"
- Buttons: 'OK', 'Cancel' at the bottom.

Clinics Tab

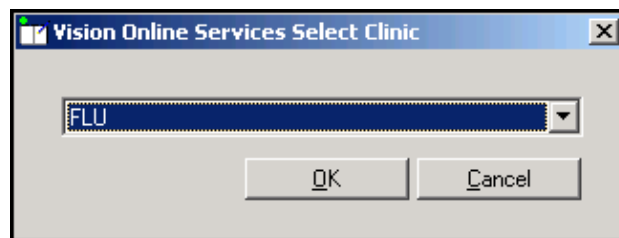
The **Clinics** tab enables you to determine which Clinics (sessions that are not linked to a specific clinician) are available to your patients online.

To add clinics:

1. From the **Vision Online Services Appointments Configuration** screen, select the **Clinics** tab.
2. **All Clinics** is ticked by default. To change this to specific clinics, remove the tick:



3. Select **Add** .
4. The **Vision Online Services Select Clinic** screen displays:



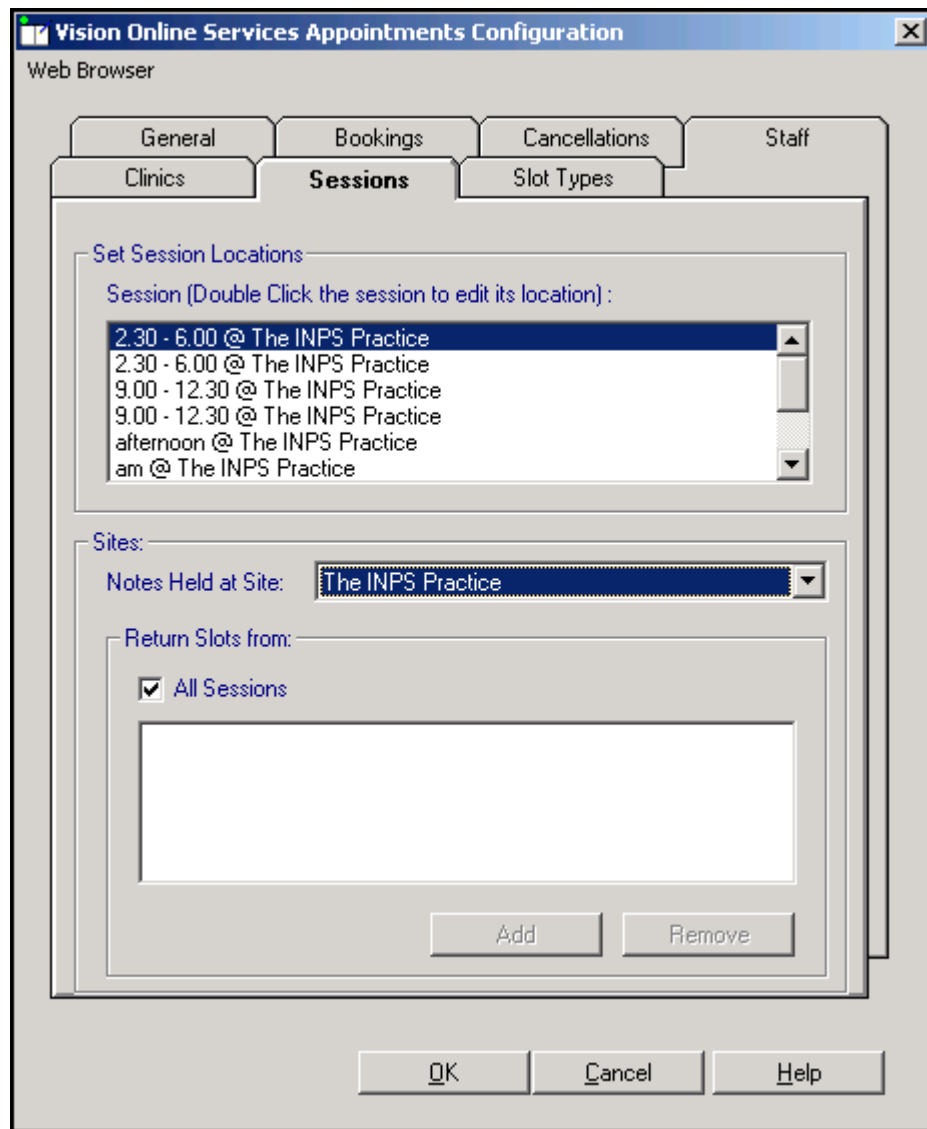
5. Select the required clinic from the list and select **OK**.
6. Repeat step 4 and 5 until you have added all the clinics you require.
7. If you have selected all the clinics in the list you are prompted: *'All available clinics have been added to the list.'*
8. Select **OK** to continue.

To remove a clinic from the list:

1. From **Vision Online Services Appointments Configuration** screen, select the **Clinics** tab.
2. Highlight the clinic to remove.
3. Select **Remove**.
4. You are prompted: *'Are you sure that you want to remove (name of clinic) from the list?'*. Select **Yes** to remove.

Sessions Tab

The **Sessions** tab enables you to configure site access and locations for sessions available within online appointments:



To set **Sessions**, **Locations** and **Sites**:

1. From **Online Services Appointments Configuration** screen, select the **Sessions** tab.
2. Complete as required:
 - **Set Session Locations:**
 - **Double Click the session to edit its location** - Lists all sessions added/created in **Vision Appointments**. Double click on a session to display the list of available locations, select the location you require and then select **OK**.
 - **Sites** - Specifies which sessions should be included for each location. This enables you to limit which sessions are included online.
 - **Notes Held at Site** - Select the site required and then either leave the tick in **All Sessions** or remove the tick and select **Add** to select the specific sessions required and repeat as necessary. Select **Cancel** to finish. If you have branch surgery(s) change **Notes Held at Site** to the alternative location and add sessions in the same way.


To remove a **Session** from the list:

1. Highlight the required session and then select **Remove**.
2. You are prompted: "*Are you sure that you want to remove (name of session) from the list?*", select **Yes** to remove.

Slot Types Tab

The slot type displays when your patients are booking appointments online. Text used on slot types by staff should be changed to something appropriate for patients, for example MS should be changed to Minor Surgery. You can also add a Welsh translation.

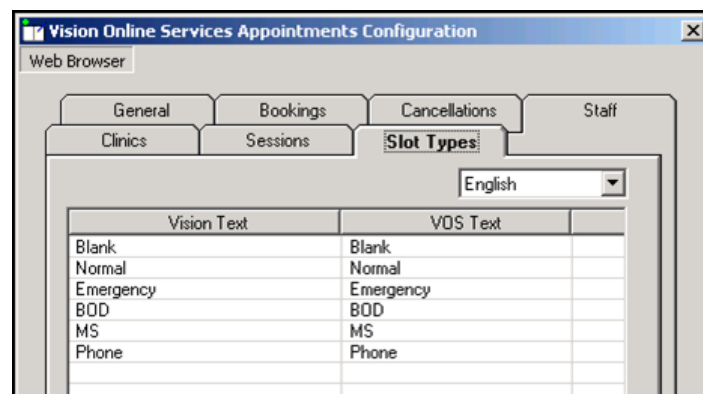
Slot types



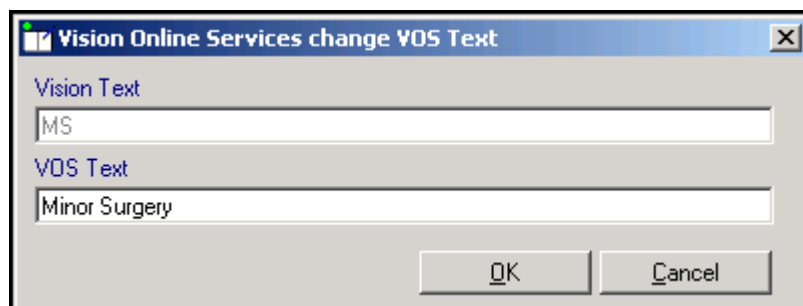
Date	Type	Clinic/Clinician	Location	
Tue 6 June 2017 at 11:40 AM	On the Day Slots	Dr Christine Maple (more)	BELFAST PRACTICE	<input type="button" value="Book"/>
Tue 6 June 2017 at 12:05 PM	Day Before Slot	Dr Richard Oparka (more)	BELFAST PRACTICE	<input type="button" value="Book"/>
Tue 6 June 2017 at 12:10 PM	Day Before Slot	Dr Richard Oparka (more)	BELFAST PRACTICE	<input type="button" value="Book"/>
Tue 6 June 2017 at 1:55 PM	Routine	A. Locum (more)	BELFAST PRACTICE	<input type="button" value="Book"/>

To change the text your patients see:

1. From Online Services Appointments Configuration select the Slot Types tab:



2. Double click the slot type to update.
3. The **Online Services change VOS Text** screen displays:



4. In **VOS Text**, enter the text you want to display.
5. Select **OK** to save.
6. Repeat steps 2 - 5 until all the slot types have **Online Services** text.
7. Now, change the language and repeat steps 2 - 7 in Welsh.

Enabling Online Appointments from Appointments

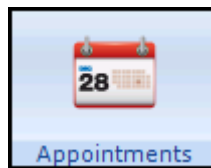
Once **Online Appointments** is configured and enabled from **Control Panel** you must decide how much of your appointment book you want your patients to have access to online. You need to consider:

- Prompting patients about online service, enabling a reminder when selecting patients in Appointments if they haven't registered for Online Services.
- Appointment Slot Types.
- Sessions.
- Clinicians.
- Reserving Slots for Web - Automatic or Manual.
- Online Services Searches and Reports.

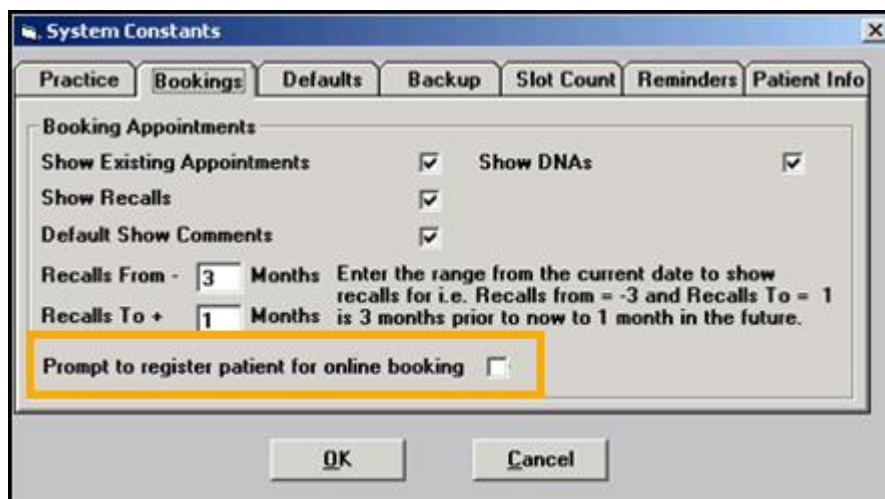
Patient Prompt

You can turn on a prompt to remind you to register a patient for online services.

To turn on the prompt:

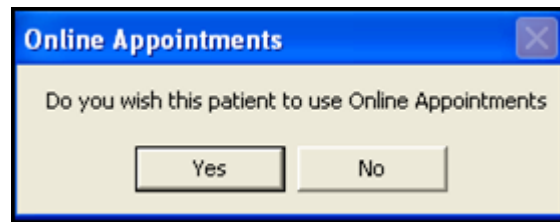


1. From **Vision 3 Appointments** – **Maintenance - System Constants – Bookings**, tick **Prompt to register patient for online booking**.



2. Select **OK** to save and close.

Once selected, each time you select a patient in **Appointments** who is not registered for online appointments, you are prompted 'Do you wish this patient to use Online Appointments'.



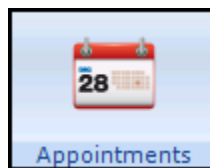
Select either:

- **Yes** - The patient's **Registration** opens in the background. Complete the appointment booking and then select **Registration** and register the patient for **Online Appointments**. See [Patient Registration](#) (page 43) for further details.
- **No** - Results in no further action this time. The next time the patient is selected, you are prompted again.

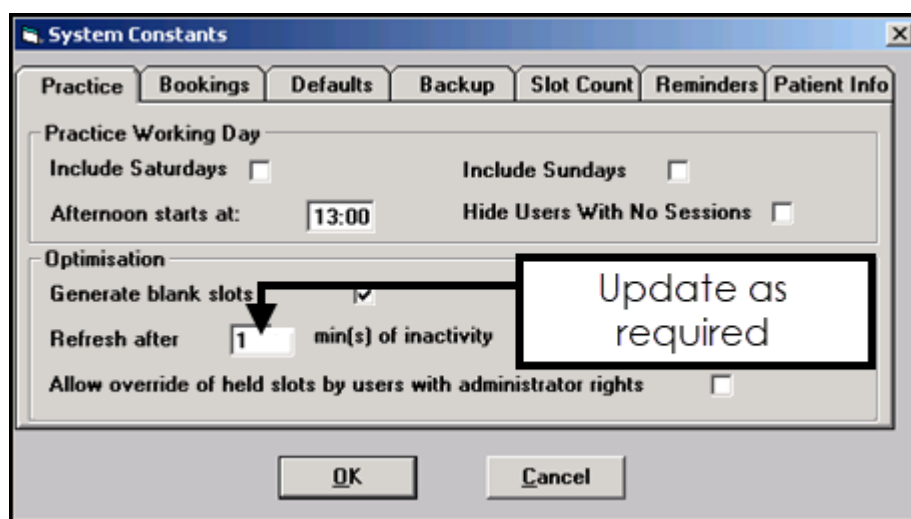
Appointment Refresh Rate

Appointments automatically refreshes to show any appointments booked, whether on site or online.


To set the refresh rate:



1. From **Appointments** – **Maintenance - System Constants** select the **Practice** tab.
2. Check **Refresh after** and update the number of minutes if required.



3. Select **OK** to save and close.

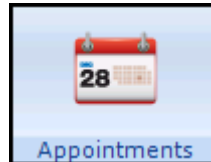
 **Note** - If your screen does not refresh regularly, you may find that when selecting a slot to book, the slot has already been selected and booked at a branch or online and you are not able to proceed with the booking.

Session Setup

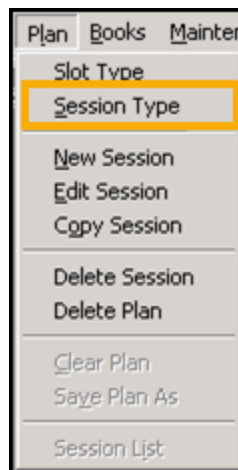
Session headers and location are displayed in online services for the patient, so it is useful to keep them to a minimum, for example, AM Surgery, PM Surgery. These session headers can then be used to set up numerous individual sessions for clinicians.

Session Types

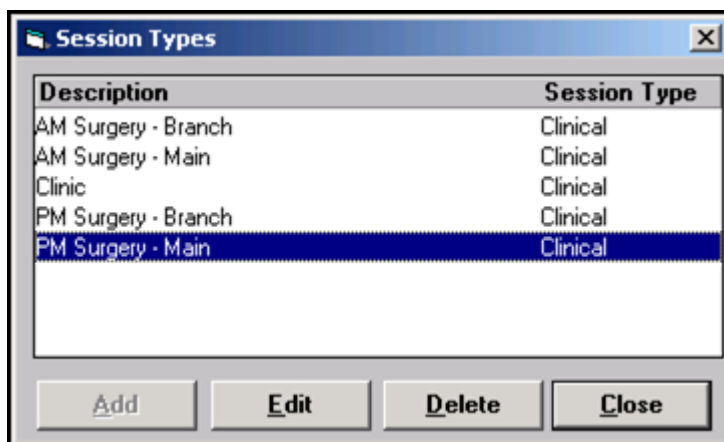
Vision 3 Appointments



1. From Vision 3 **Appointments**, select **Plan**:




2. Select **Session Type**, the **Session Types** screen displays:



3. Select as required:

- **Add** – Select to add a new **Session Type**. Enter a description and select **OK**. To add further sessions select **Add** and repeat this process until you have added all the required sessions.


 **Note** - If you are, or have a branch surgery, we recommend that you have session headers for each site, for example, AM Surgery – Main Site, AM Surgery - Branch Site. To help identify site locations for your patients consider replacing Main or Branch with the actual name.

- **Edit** - Select to update an existing session, highlight the session and select **Edit**.
- **Delete** – Select the session you want to remove and select **Delete**. You are prompted 'Are you sure you want to delete the selected session types', select **Yes** to confirm deletion or **No** to cancel the deletion. If the session is in use, you are prompted 'Session Type is being used in a Weekly Plan. You cannot delete this item.'. You need to edit the **Weekly Plan** to enable the deletion of the session type.


Appointments Setup



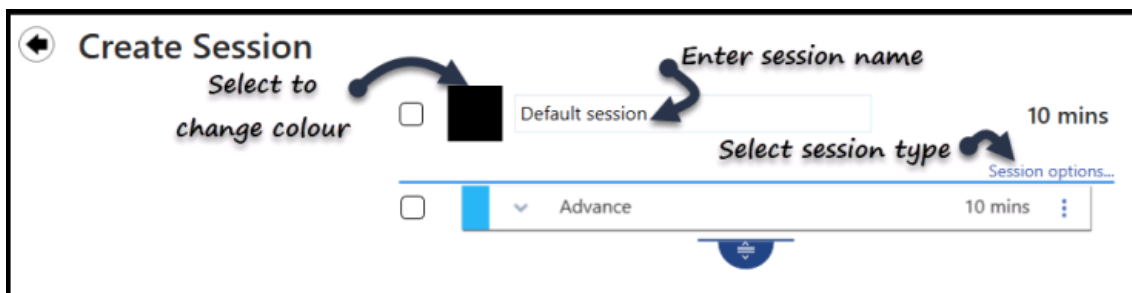
1. From Appointments Setup , select Appointment Setup menu.

2. Select **Sessions**  from the navigation bar.


3. The **Session** view displays.

4. Select **Add session**  from the top of the view and the **Create Session** view displays.

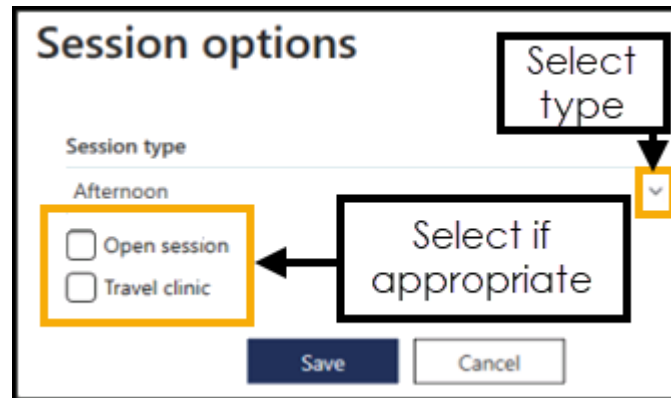
5. Enter a name for the new session:



The name is used when listing the sessions in the **Session List**, for example, Dr Smith AM surgery, Nurses PM surgery, Ante-Natal Clinic.

 **Note** - The session duration updates when the session is extended, or can be set manually.

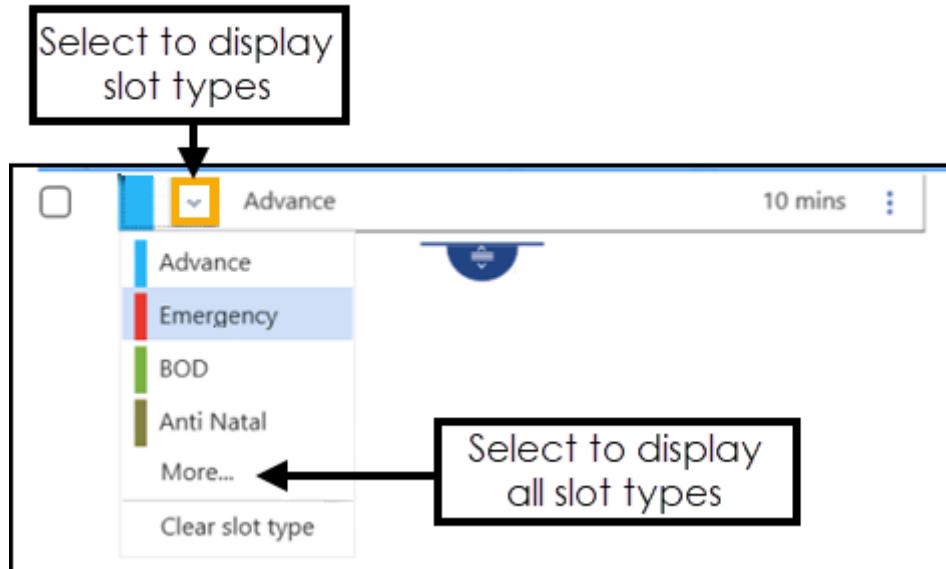
6. Select **Session options** to set the session type, you can also choose if you want the session to be a travel clinic:



7. Select the Black square to display the available colours for the session heading.
8. Choose a colour from the palette, optionally, tick **Show unused colours only**, to avoid duplicating colours:



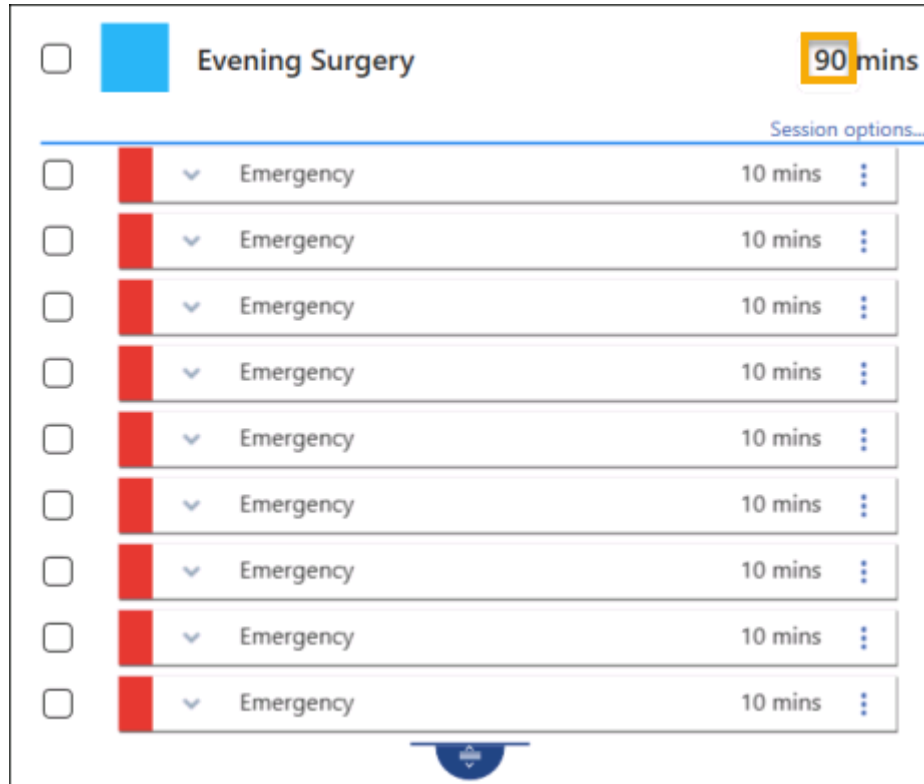
9. The default slot type is the top slot type on your slot types view, to change the slot type select the arrow to the left of the slot name. The frequently used slot list displays, select **More...** to view all slot types:



10. Select the new slot type, the slot can then be populated into the rest of the session, for example all asthma slots for the asthma clinic.

 **Note** - You can still make changes to the slot types once the session is created.

11. Enter the duration of the session, for example 90 mins and the session automatically expands, using the web bookable slot type:



Alternatively, select the drag handle  to extend the surgery, using the chosen slot type. The duration updates as you move the drag handle.

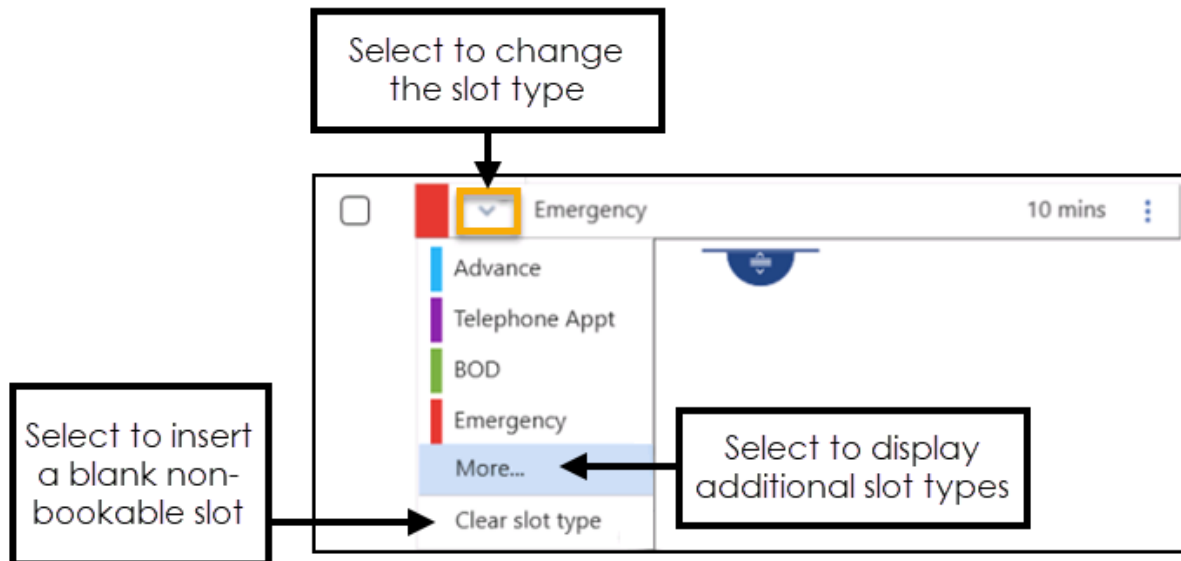


Remember - The slots can be extended in a pattern.

- If required, change the slot types, select the arrow next to the slot name and choose a slot type from either the frequently used slot types offered or select **More** to select from additional slot types.



Remember - You can have a mixture of slots with different lengths in the session.



Clear Slot type inserts a blank non-bookable slot, these are often used as catch up slots.



Remember - You can change multiple slots.

- Select **Save** at the bottom right of the screen to update the changes, or select **Reset** to cancel any changes.
- The **Sessions** view displays, if required you can drag the new session above the separator line to include it in the frequently used sessions.
- If you have added the session to the frequently used section, select **Save** to update the changes, or select **Reset** to cancel any changes.

Session Setup

Travel Clinic

Sessions can be defined as travel clinics. This enables the patient to select a country from a drop-down list, which is then added to the appointments comments and can be viewed in both **Consultation Manager** and **Appointments**.

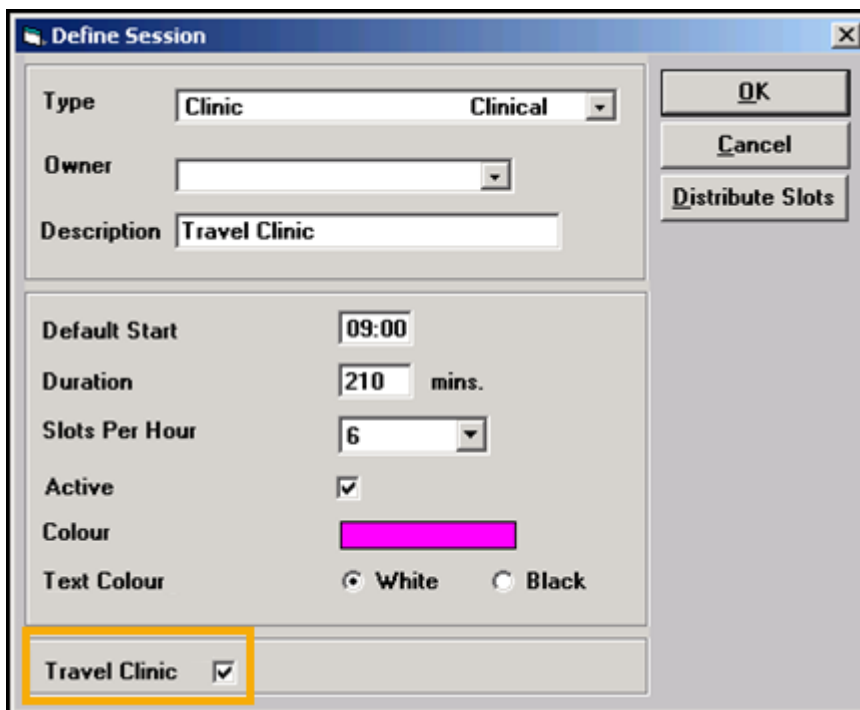
Creating a Travel Clinic

To create a Travel Clinic session:

Vision 3 Appointments



1. From **Appointments** select **Plan - New Session** to create a new session, or **Edit Session** to change an existing session.
2. Check the existing details or add new details as required.
3. Tick **Travel Clinic**:



The screenshot shows the 'Define Session' dialog box with the following settings:

- Type: Clinic (Clinical dropdown)
- Owner: (empty dropdown)
- Description: Travel Clinic
- Default Start: 09:00
- Duration: 210 mins.
- Slots Per Hour: 6
- Active:
- Colour: (pink color swatch)
- Text Colour: White Black
- Travel Clinic: (highlighted with a yellow box)

Buttons on the right: OK, Cancel, Distribute Slots.

4. Select **Distribute Slots** and change the slots to a **Web Default travel clinic** slot type. Select **OK**.
5. Select **OK** to save and close the session.
6. The session is now a travel clinic and can be added to the appointment books as required.

Appointment Setup



1. From **Appointments Setup**, select **Appointments Setup** menu -

Sessions

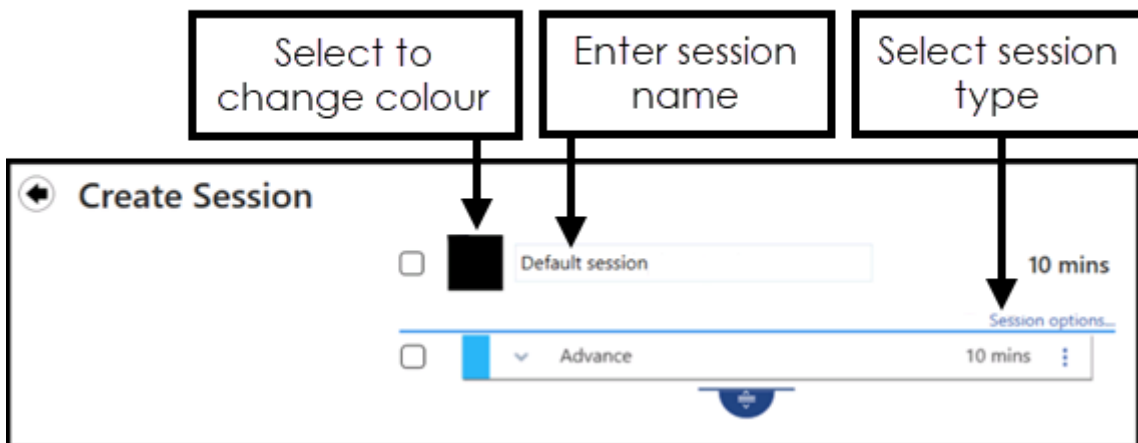
Sessions

2. The **Session** view displays.

3. Select **Add session** from the top of the view and the **Create Session** view displays.

Add session...

4. Enter a name for the new session:



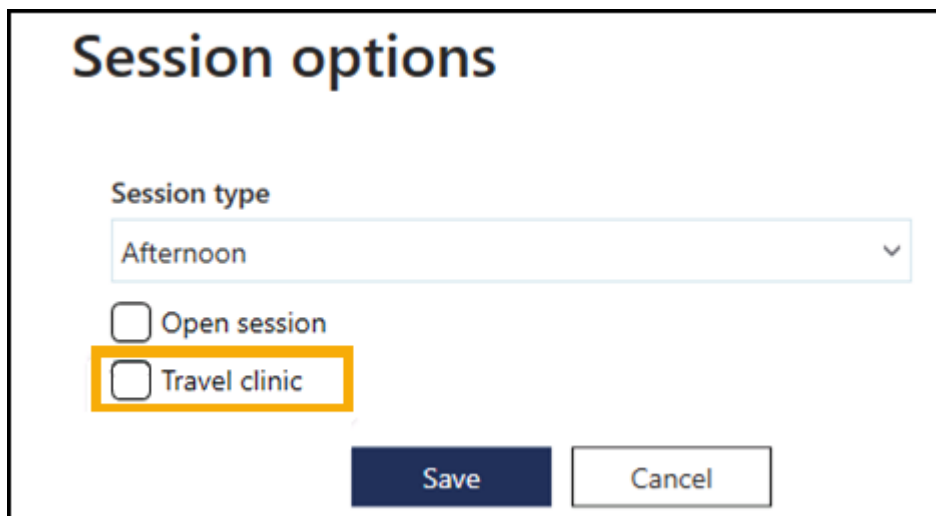
Annotations for the 'Create Session' form:

- Select to change colour (points to the black color swatch)
- Enter session name (points to the 'Default session' text field)
- Select session type (points to the '10 mins' duration field)

The name is used when listing the sessions in the **Session List**, for example, Travel Clinic.

 **Note** - The session duration updates when the session is extended, or can be set manually.

5. Select **Session options** to set the session type, and tick **Travel clinic**:



Session options

Session type: Afternoon

Open session

Travel clinic

Save Cancel

6. Complete creating the session in the usual way.



Remember - If you are using the **New Appointment** apps



, for help please refer to either the Appointments Help Centre

http://help.visionhealth.co.uk/Appointments_new/content/home.htm or the Appointments Setup Help Centre

http://help.visionhealth.co.uk/Vision_Appointments_Setup/Content/Home.htm.

Configure Slot Type & Reserve Slots for Web Use

The following options are designed for the easier configuration of online slots:

- **Non-Bookable.**
- **Non-Viewable.**
- **Web Default.**

Vision 3 Appointments



Training Tip - For internal messaging or tasks, practices should consider using Daybook/Tasks which is specifically designed to create, track and complete administrative tasks.



Important - If appointments are used for messages or tasks about a patient, for example, 'Home Visit, message from patient, and the patient is registered for online services, an appointment reminder email is sent to the patient even if the slot type has been made non-viewable.

Appointments Setup

Create Slot Type


Name Required info

Web bookings Non-viewable


Short Name Required info

Duration mins

Available for booking

Colour 

Appointments booked by your patient online must be reserved by being marked **Reserved for Web**. You can do this either manually or automatically.

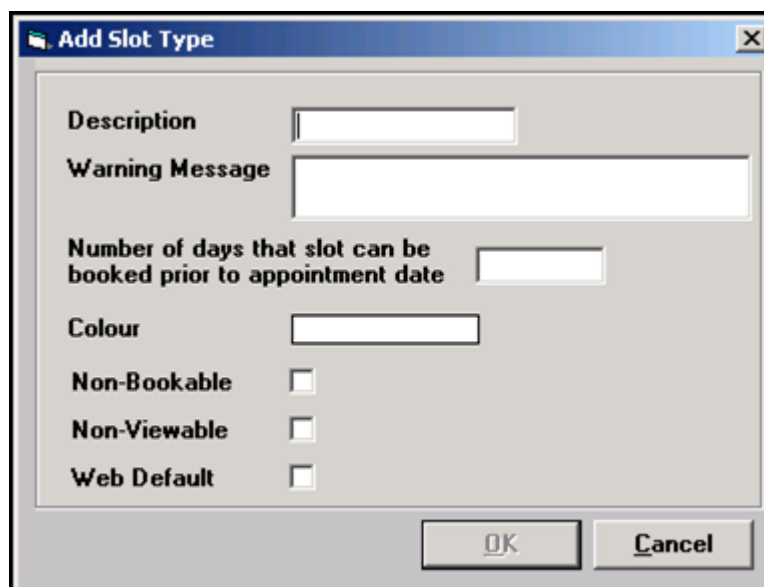
 **Note** - You can configure slot types to display a message to the patient when they book an appointment online.

Slot Type

When creating or editing Slot Types the following options are available:

- **Non-Bookable** - A slot type which cannot be booked. Non-bookable slots cannot be viewed or booked from Vision or online.
- **Non-Viewable** - Viewable from Appointments, Consultation Manager, Mail Manager and 3rd party applications. These slots are not displayed online for patients to book, however when booked at the practice, confirmation emails are sent to patients registered for online services.
- **Web Default** - Automatically reserves the slot(s) for web use when added to a session. Each time the session is extended the slots are automatically created and marked **Reserve for Web**.

Vision 3 Appointments



The screenshot shows a dialog box titled "Add Slot Type" with the following fields and options:

- Description: [Text Input Field]
- Warning Message: [Text Input Field]
- Number of days that slot can be booked prior to appointment date: [Text Input Field]
- Colour: [Text Input Field]
- Non-Bookable:
- Non-Viewable:
- Web Default:

Buttons: OK, Cancel

Appointment Setup

Create Slot Type

Name

Web bookings Non-viewable *Required info*

Short Name

Required info

Duration

 mins

Available for booking

 ▼

Colour

Non-Bookable Slots

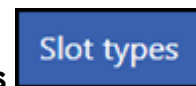
The **Non-Bookable** option allows you to create a slot type which cannot be booked or viewed in Vision or online.

Vision 3 Appointments



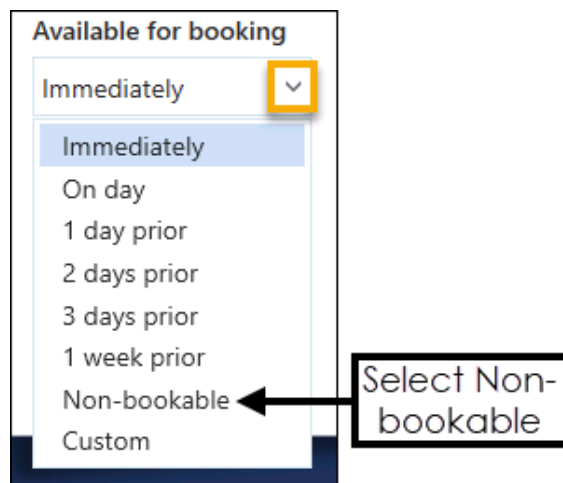
1. From **Vision 3 – Appointments**, select **Plan – Slot Type**.
2. Select an existing slot type and select either **Edit** or **Add** to create a new slot type.
3. Select **Non – Bookable**.


Appointment Setup




1. From **Appointment Setup**, select **Slot types**.
2. Select either **Add slot type** or select the slot to edit and select **Edit**.
3. From **Available for booking**, select **Non-bookable**:

Add slot type...



 **Note** - If appointment slots are used for messages or tasks about a patient, for example, Home Visits, Re-authorise Repeats and the selected patient is registered for online services, an appointment reminder email is sent to the patient even if the slot type has been made non-viewable.

 **Training Tip** - Practices should consider using **Daybook/Tasks** which is specifically designed to allow practices to create, track and complete administrative tasks.

Non-Viewable Slots

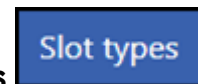
Non-viewable slots can be viewed from **Appointments, Consultation Manager, Mail Manager**, and 3rd party applications. They are not displayed online for patients to book, however when booked at the practice, confirmation emails are sent to patients registered for online services.

Vision 3 Appointments



1. From **Vision 3 – Appointments**, select **Plan – Slot Type**, select an existing slot type and click **Edit**, or click **Add** to create a new slot type.
2. Create **Slot Type** as usual adding in description, warning message and colour as per practice protocol.
3. Select **Non – viewable**.
4. Select **OK**.

Appointment Setup



1. From **Appointment Setup**, select **Slot types**.
2. Select either **Add slot type** or select the slot to edit and select **Edit**.
3. Tick **Non-viewable**.
4. Complete the rest of the slot type in the usual way and select **Apply**.

Web Default/Bookings

Defining a slot as **Web Default/booking** automatically reserves the slot(s) for web use when added to a session.

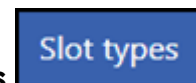
Each time a session is extended that contains **Web Default/bookings** slots, they are automatically created and marked **Reserve for Web**. You can also book Web Default/bookings slots from within **Appointments**.

Vision 3 Appointments



1. From **Vision 3 – Appointments**, select **Plan – Slot Type**.
2. Select an existing slot type and select either **Edit** or **Add** to create a new slot type.
3. Create **Slot Type** as usual adding in description, warning message and colour as per practice protocol.
4. Select the **Web Default** box.
5. Select **OK**.

Appointment Setup



1. From **Appointment Setup**, select **Slot types**.
2. Select either **Add slot type** or select the slot to edit and select **Edit**.
3. Tick **Web bookings**.
4. Complete the rest of the slot type in the usual way and select **Apply**.


 **Note - Reserved for Web** slots require **Staff** and **Session** setup in **Online Services** before they are available to patients.

Reserving Slots

For slots to be available online they must first be reserved from **Appointments**. Only slots marked **Reserved for Web** are available for patients to book online.

You can define slots for web booking:

- When adding/editing sessions, if slots are defined as **Web Default/bookings**, each time the books are extended the **Reserved for Web** slots are created automatically.
- **Reserved for Web** slots can also be added by the practice manually, this needs to be repeated each time the appointment books are extended or modified.

 **Note** - When the Books are next extended that contain the edited or new session, the **Reserved for Web** slots that have been set as default appear online and in the Appointment book.


Reserve for Web – Automatic

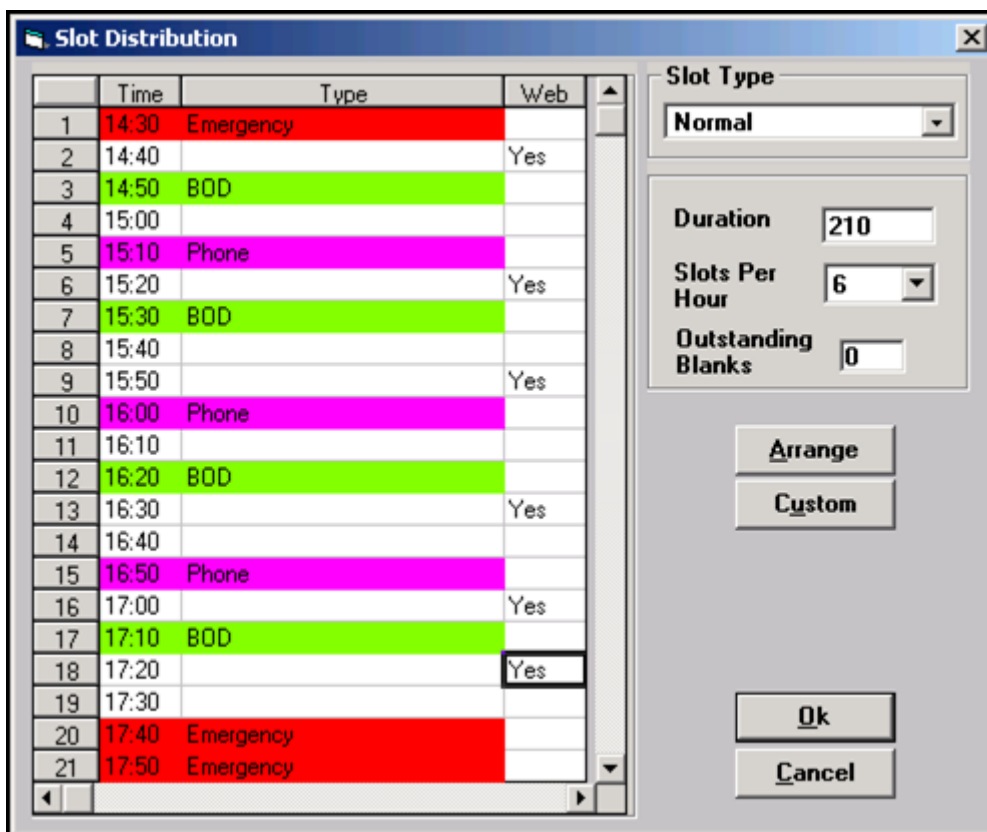
Reserved for Web slots can be automatically created in the following ways:

Vision 3 Appointments



1. From **Vision 3 – Appointments**, select **Plan - New Session** or edit an existing session and select **Distribute Slots**.
2. Select a slot that has **Web Default** ticked for distribution in the session, **Yes** is displayed in the web column.
3. Select **OK** and then **OK** again.

 **Note** - When the Books are next extended that contain the edited or new session, the **Reserved for Web** slots that have been set as default appear online and in the Vision Appointment book.



	Time	Type	Web
1	14:30	Emergency	
2	14:40		Yes
3	14:50	BOD	
4	15:00		
5	15:10	Phone	
6	15:20		Yes
7	15:30	BOD	
8	15:40		
9	15:50		Yes
10	16:00	Phone	
11	16:10		
12	16:20	BOD	
13	16:30		Yes
14	16:40		
15	16:50	Phone	
16	17:00		Yes
17	17:10	BOD	
18	17:20		Yes
19	17:30		
20	17:40	Emergency	
21	17:50	Emergency	

Slot Type: Normal

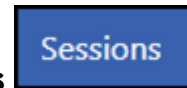
Duration: 210

Slots Per Hour: 6

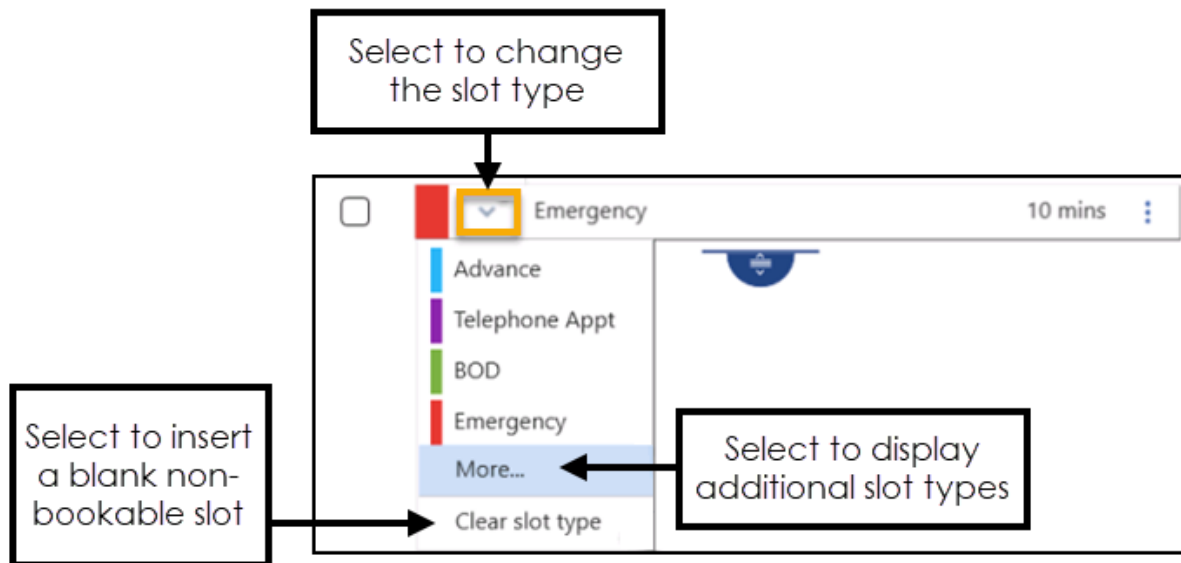
Outstanding Blanks: 0

Buttons: Arrange, Custom, Ok, Cancel


Appointment Setup



1. From **Appointment Setup**, select **Sessions** and either add or edit a session as required.
2. Select the default slot for this session and then define the duration of the session, for example 90 mins. The session automatically expands, using the specified slot type.
3. Update the slot types as required.



4. Select **Save**.

 **Note** - To release the reserved slots, right click on the slot and select **Reclaim from Web**.

Reserve for Web - Manual

Reserving Slots manually can be done for:

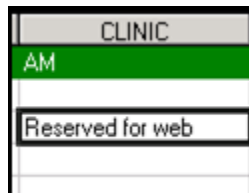
- **Individual Appointments.**
- **Multiple appointments.**
- **Recurrent Appointments.**

Vision 3 Appointments



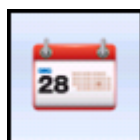
From **Vision 3 – Appointments**, to reserve individual appointments for use by online appointments:

1. Open a view and highlight the required slot.
2. Right click and select **Reserve for Web**.
3. The selected slot is now displayed as **Reserved for web**.



From **Vision 3 – Appointments**, to reserve multiple appointments for use by online appointments:

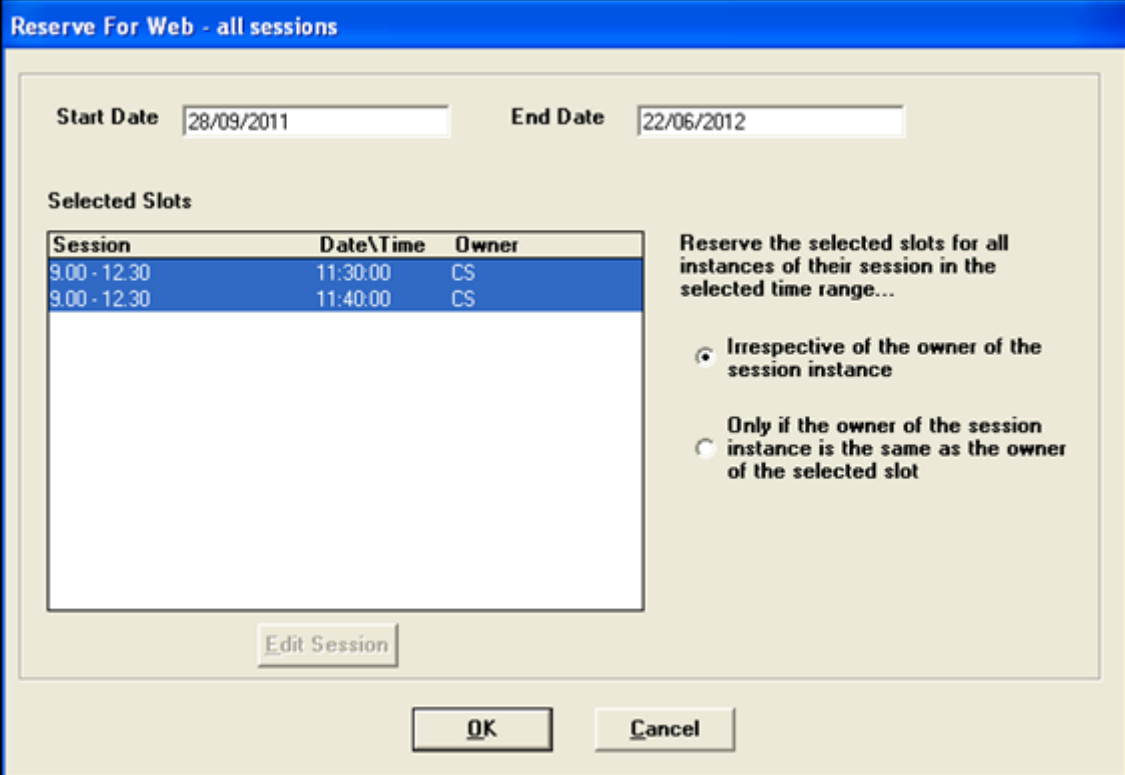
1. Open a view and find the slots required.
2. Highlight the required slots by holding the **Control Key** on the keyboard, then clicking on each slot required.
3. Right click and select **Reserve for Web**.
4. The selected slots are now shown as **Reserved for web**.



From **Vision 3 – Appointments**, to reserve recurrent appointments for use by online appointments, for example, 11:00 appointment slot and all future matching 11:00 slots with matching session type and book owner, within a specified time frame:

1. Open a view and find the slot(s) to reserve, highlight the required slot(s).
2. Right click and select **Reserve for Web – All Sessions**.
3. The **Reserve For Web – all sessions** screen is displayed.
4. Enter a **Start** and **End** date (double click to access the calendar) to specify when the slots are to be reserved.

5. You are prompted to "Reserve the selected slots for all instances of their session in the selected time range". Select either:
- **Irrespective of the owner of the session instance.**
 - **Only if the owner of the session instance is the same as the owner of the selected slot.**



Reserve For Web - all sessions

Start Date: 28/09/2011 End Date: 22/06/2012

Selected Slots

Session	Date\Time	Owner
9.00 - 12.30	11:30:00	CS
9.00 - 12.30	11:40:00	CS

Reserve the selected slots for all instances of their session in the selected time range...

Irrespective of the owner of the session instance
 Only if the owner of the session instance is the same as the owner of the selected slot

Edit Session

OK Cancel

6. Each current slot that matches the selection is now reserved for use for online appointments. When extending appointment books, slots are reserved for the time period specified. The selected slots are now shown as **Reserved for Web**.
7. To release the reserved slots, right click on one of the affected slots and select **Reclaim from Web – All Sessions**.

i Important - You need to repeat this process when the time period expires to reserve new extended slots.

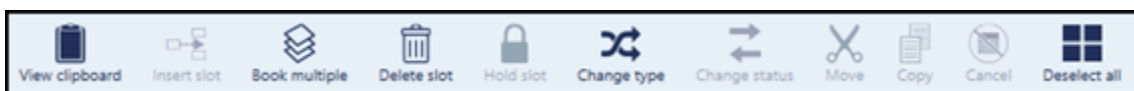
Appointment Setup



1. From **Appointment Setup**, to reserve one or more individual appointments for use by online appointments:
2. From either the **Session** or **Day view**, right click on the appointment(s) to select.

3. **nn items selected**  appears at the bottom of the screen confirming the number of items selected.

4. The toolbar activates at the top of the screen.



5. Select **Change type** .
6. Select **Reserved for Web** from the available list and the selected slot(s) are automatically updated to **Reserved for Web**.

Patient Registration

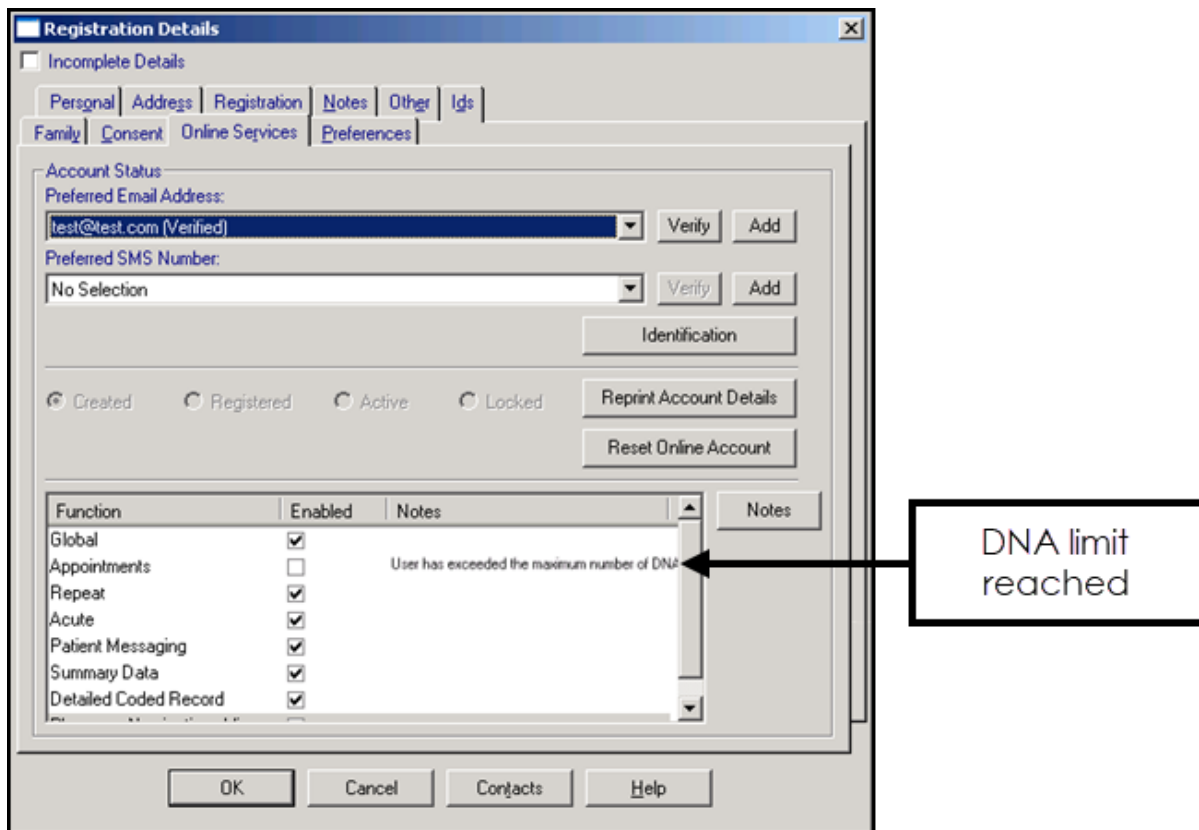
Once **My Health Online** has been activated in **Control Panel**, the **Online Services** tab becomes available in **Registration**. This enables you to create an online services account for the patient, see [Creating a Patient Online Account](#)

http://help.visionhealth.co.uk/patient_online_Services_Help_Centre/Content/B_Getting%20Started/Registering_Patients_for_Online_Services.htm for details.

An option within **System Constants** in **Appointments** enables a prompt to be displayed for any patient not registered for online services, see [Patient Prompt](#) (page 22) for details.

Online DNA Limit Reached

When a patient's online DNA limit is reached, their account is disabled, with 'User has exceeded the maximum number of DNAs allowed' automatically displayed in **Registration - Online Services - Notes**:



The next time the patient logs into **My Health Online**, any links to Appointments have been removed. The patient cannot access Appointments until the number of DNAs is outside the date and number range set on **Control Panel - File Maintenance - Online - Appointments - Configure - General** tab:

DNAs

Display DNAs to patient

Prevent access to VOS after this many DNAs

Check DNAs in this range

Reporting

To manage **My Health Online Appointments**, the following searches are



available from **Appointments**:

- **Online Appointment Report** – this enables you to analyse online appointment usage by patients, looking at slots available, booked or cancelled, see [Online Appointment Report](#) (page 45).
- **Did Not Attend (DNA) Report** – the report indicates whether the appointment was booked online, see [Did Not Attend \(DNA\) Report](#) (page 47).

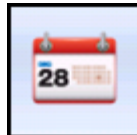
A further search tool has been added to **Search and Reports** to enable you to list patients at each stage of MHOL registration, for example, patients with an active MHOL account.

Online Appointment Report

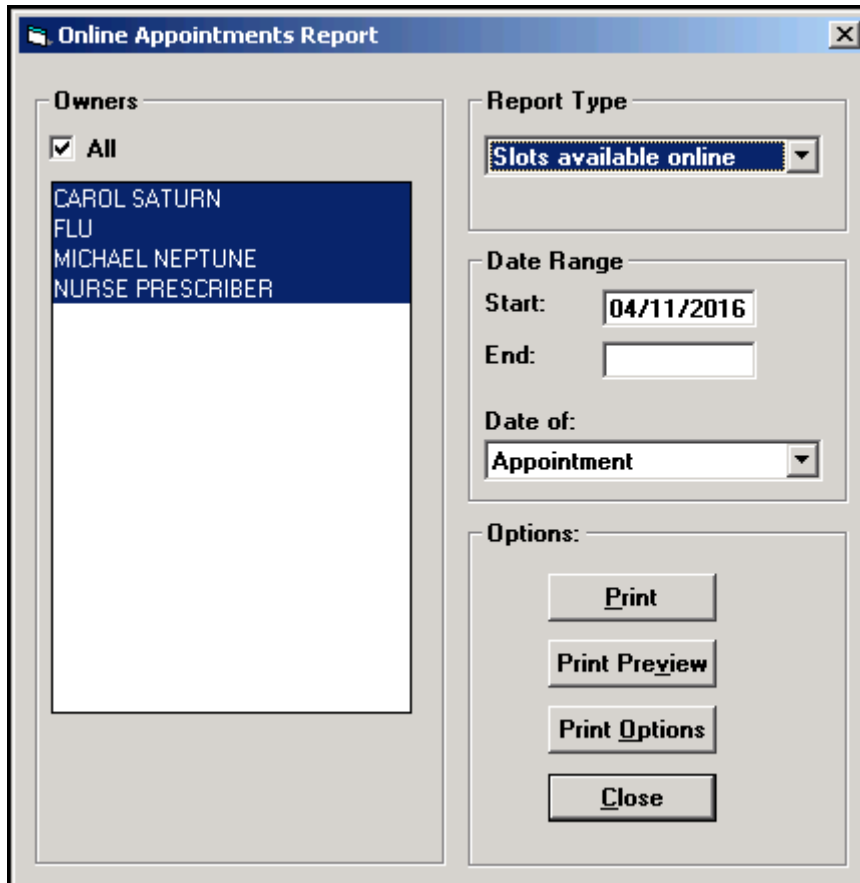
The Online Appointments Report allows you to create the following report types:

- Slot available online.
- Slots booked online.
- Slots cancelled online.

To print the report:



1. From Vision 3 Appointments, select **Search – Online Appointments Report:**



Online Appointments Report

Owners

All

CAROL SATURN
FLU
MICHAEL NEPTUNE
NURSE PRESCRIBER

Report Type

Slots available online

Date Range

Start: 04/11/2016

End:

Date of: Appointment

Options:

Print

Print Preview

Print Options

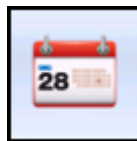
Close

2. Specify the criteria you require:
 - **Owners**, select those required or tick All for all clinicians.
 - **Report Type**, select the report required.
 - **Date Range**, specify the dates required.
 - **Date of:**
 - **Slots available online** – Date of Appointment only.
 - **Slots booked online** – Select date of Appointment, or date of Booking.
 - **Slots cancelled online** – Select date of Appointment, Booking or Cancelled.
3. Select **Print** to run and print the report.
4. To view the report on screen, select **Print Preview**, this report can then be printed. To print, select the **Print** button. Select **Close** to finish

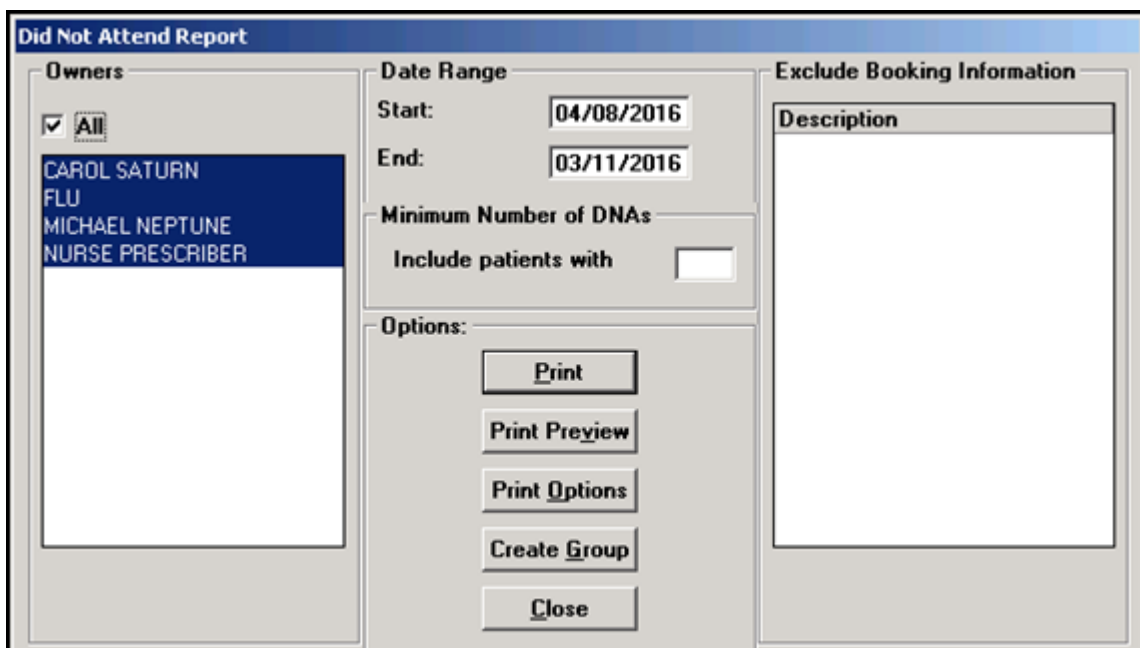
Did Not Attend (DNA) Report

The DNA report displays all DNA's and identifies those that have been booked online.

To create a Did Not Attend Report:



1. From Vision 3 **Appointments**, select **Search – Did Not Attend Report**.
2. Select a date range, clinician(s) and exclude booking reasons if required:



The screenshot shows the 'Did Not Attend Report' window with the following sections:

- Owners:** A list of owners with a checked 'All' option. The list includes CAROL SATURN, FLU, MICHAEL NEPTUNE, and NURSE PRESCRIBER.
- Date Range:** Start: 04/08/2016, End: 03/11/2016.
- Exclude Booking Information:** A section with a 'Description' label and an empty text area.
- Options:** A vertical stack of buttons: Print, Print Preview, Print Options, Create Group, and Close.

3. Complete as required:
 - **Owners** - highlight those required or **All**.
 - **Date Range** - select a date range.
 - **Minimum Number of DNAs** - specify a number if required.
 - **Exclude Booking Information** - highlight if required.
4. Select **Print Preview** to view the report prior to printing, then **Print** to print the report.

Online Appointments (Patients)

Overview

Once your patient has registered and activated their **My Health Online** account, they can use the services enabled at your practice. This section of the user guide explains how the patient uses Online Appointments to book and cancel appointments. Full patient help is available from:

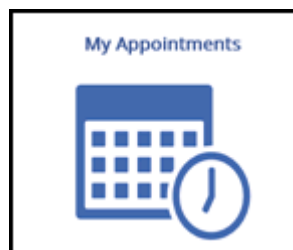
- English - http://help.visionhealth.co.uk/My_Health_Online_Patient_Help_Centre/Content/Home.htm
- Welsh - http://help.visionhealth.co.uk/Canolfan_Cymorth_Cleifion_Fy_Iechyd_Ar-lein/Content/Hafan.htm

Booking and Cancelling Appointments

Once you have registered for **My Health Online**, you can make, view and cancel your appointments at your GP practice, day or night, from anywhere with internet access.

How do I Book an Appointment?

1. Log in to **www.myhealthonline-inps2.wales.nhs.uk** in the usual way.

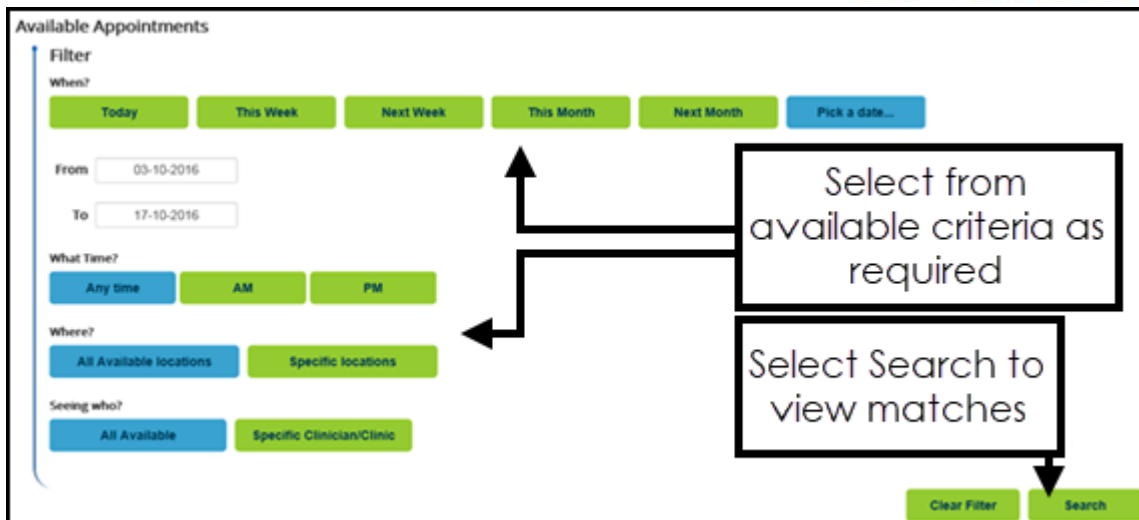



2. Select **My Appointments** and the **Appointment** screen displays showing general appointments advice from your surgery and any appointments you already have booked.

3. To book a new appointment, select **Add New Appointment**



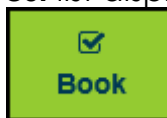
4. The **Available Appointments** screen displays, with all available appointments in the next two weeks displaying at the bottom of the screen. If your surgery has selected different colours for different appointment types, you may see different colours here.
5. If you want to fine tune the offered appointments, you can select your appointment preferences:








6. If you have fine tuned the search, select **Search**  to run the search on your selections.


7. The **Slots matching your request** list displays, select the appointment

you require and select **Book**










Date	Type	Clinic/Clinician	Location	
Mon 3 Oct 2016 at 3:40 PM		Dr Micky Neptune (more)	The INPS Practice	
Mon 3 Oct 2016 at 3:50 PM		Dr Micky Neptune (more)	The INPS Practice	
Mon 3 Oct 2016 at 4:00 PM	Telephone Consultation	Dr Micky Neptune (more)	The INPS Practice	
Mon 3 Oct 2016 at 4:10 PM		Dr Micky Neptune (more)	The INPS Practice	
Tue 4 Oct 2016 at 9:00 AM		Dr Carol Saturn (more)	The INPS Practice	

8. The **Confirm your booking** screen displays. Check the details carefully and enter a **Reason for the appointment** at this point should you want to.

 **Note** - If your practice has enabled reminder emails, you receive a reminder email before your appointment is due.

Confirm your booking

-  The INPS Practice
-  Mon 3 Oct 2016 4:10 PM
-  4:10 PM for 10 minutes
-  with Dr Micky Neptune
-  Male
-  Spoken Languages: English , Welsh
-  Written Languages: English , Welsh

Check the details of your appointment





Reason for the appointment (optional)

You can add a reason for your booking here if you want to

1000 characters left Please note that practice staff other than the clinician may read this


[← Back](#) [✓ Confirm](#)

If the appointment you have selected is a Travel Clinic appointment, you are asked to select a country.

9. Select **Confirm**  to book the appointment.
10. The **Appointment Booked Successfully** screen is displayed along with your appointment details (please make a note of these).
11. (Optional) Select **Save to Calendar**  to save the details to your electronic calendar.
12. (Optional) Select **Print**  to print your appointment details.
13. Now, either:
 - Select **Appointments Home** , or another online service from the list at the top of the screen, or
 - Select **Log Out** to leave **My Health Online**.

If your appointment booking fails, the 'Your booking was not successful, there was an error while attempting to book your chosen appointment' message

displays. Select **Add New Appointment**  to reselect and book the appointment.

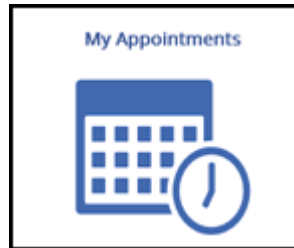
 **Note** - Depending on the set up at your GP practice, there may be a cancellation cut off period. This prevents you from cancelling an appointment online a certain amount of time before the appointment, for example within 30 minutes of the appointment time. If a cancellation cut off is relevant and you are prevented from cancelling the appointment, you must contact your practice prior to the appointment time to cancel.

How do I Cancel an Appointment?

If you no longer require an appointment, it is important that you cancel it as soon as possible. Failure to cancel an appointment before the appointment time results in it being recorded as a did not attend (DNA) appointment.

To cancel an appointment:

1. Log in to **www.myhealthonline-inps2.wales.nhs.uk** in the usual way.



2. Select **My Appointments** and your Appointments screen displays.
3. Any appointments you have booked, whether they were booked at the practice or online, display. You can see the location, date, time, type and clinician of the appointment(s).

4. Select the appointment you wish to cancel and select **Cancel**



5. The **Cancel your appointment** screen is displayed.
6. Select a cancellation reason from the drop down list, this list is created by your surgery.

7. Select **Confirm**



8. If successful, the **Appointment Cancelled Successfully** message displays. You may receive a cancellation confirmation email message (depending on the preferences of your practice).

If unsuccessful, the **Cancel Appointment: Failed** message displays, select **Back** to return to the **Cancel Appointment** details.