



Quick Guide to Making Changes to the Reception or Book View

This Quick Reference Guide has been designed to help you manage your Appointment system in Vision. Below are some Appointment Maintenance Functions:

 **Note** - This document does not cover Vision online Appointments.

Right Mouse Functions

It is easy to change a surgery on the Reception or Book view, simply right click on an appointment slot and choose:

- **Make Slot Unavailable** - this makes the slot unavailable.
- **Make Slot Available** - this makes the slot available.
- **Remove a Slot** - this option removes the slot completely.
- **Insert a Slot** - this allows you to insert slot(s).

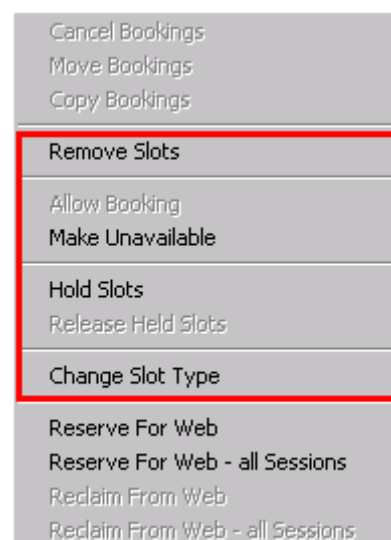


Right Mouse options

Multiple options - Right Mouse Functions

By using the control key and highlighting multiple slots you can right click and choose:


- **Make Multiple Slots Unavailable** - as above.
- **Make Multiple Slots Available** - as above.
- **Remove Multiple Slots** - as above.
- **Holds Slots** - this option will hold slots.
- **Release Held Slots** - this option releases held slots.
- **Change Slot Types** - this allows you to change the slot type.



Appointment Options



Insert a Session

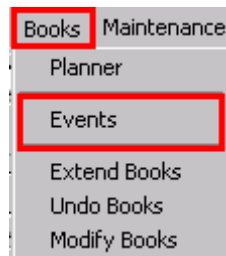
1. Select the icon Show Session List .
2. Click the box **All**, to display all sessions.
3. Drag the required session from the Session list to the book owner on the Reception view.
4. A confirm details window displays, click **OK**.

Remove a Session

1. Highlight the session heading.
2. Right click and choose **Remove Session**.
3. You are warned if the session you are about to remove contains appointment(s).
4. Click **Yes** or **No**, depending on whether you want to re-schedule the appointments or not.

Add an Event

1. To add a new event eg Holidays, click on **Books - Events**.



Events

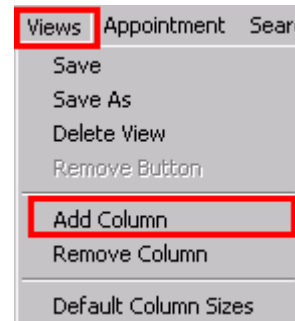
2. Choose the Owner and click **Add**.
3. The Add event window appears - enter a **Start date** and **time**, and an **End date** and **time** for the event.
4. Type a free text description eg Holidays.
5. Select the option to either **Marks slots as Unavailable** or **Delete Slots**.
6. Click **OK**.



Important - Normally we do not recommend you leave slots as available, as this enables appointments to be booked. The only time this might be used is if you have a locum covering for a clinician and you have not created a separate locum book owner.

Add a Column and choose a Book Owner

1. Add a column by selecting **Views - Add Column**.



Views - Add Column




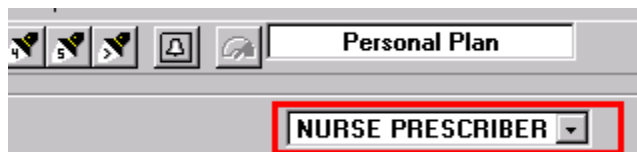
Note - The new column is inserted to the right of the column you are clicked in and puts the heading; **None** at the top.

2. To select an owner for the new column, right click on the heading **None** and choose the book owner from the drop down list.
3. Click **View** and choose **Save**.

Maintaining Personal Plans

Selecting the Personal Plan

1. Select the **Personal Plan**  icon.
2. Select the **Book Owner** (GP or clinic).
3. Where the Book Owner has multiple plans, choose the correct plan from the base of the screen.
4. After updating the Personal Plan, click **OK** to save the changes.



Personal Plan - Choosing the Book Owner




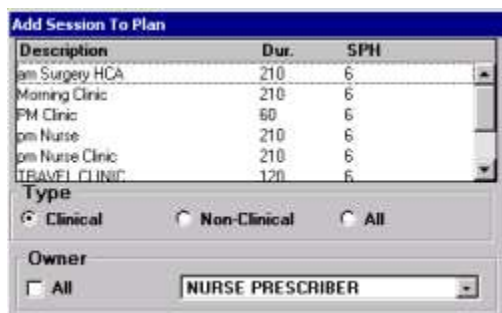
Choosing the Plan

NURSE PRESCRIBER		
Wednesday	Thursday	Friday
Morning Clinic 08:00 - 11:30	Morning Clinic 08:00 - 11:30	Morning Clinic 08:00 - 11:30
pm Nurse Clinic 14:30 - 18:00	pm Nurse Clinic 14:30 - 18:00	pm Nurse Clinic 14:30 - 18:00

Personal Plan

Personal Plan - Inserting a Session

1. List the sessions available using the Session List  icon.



Session list


2. Select a session and drag it onto the Personal Plan.
3. To confirm the session, click **OK**.
4. Click **OK** to save the Personal Plan.

Personal Plan - Removing a Session

1. Highlight the session to be removed.
2. Click on the **Remove** button.



3. Select **Yes**, to confirm that you want to remove the session.
4. Click **OK** to save the Personal Plan.

 **Note** - Any changes made to the Personal Plan only take effect the next time you extend the book.

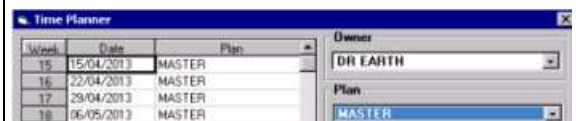
Extending the Book

Extend Books is used to generate Appointment Slots and should be run on a regular basis. If Book owners use multiple plans you first need to check that the correct plan is in the Planner.

 **Note - Extending the books does not require exclusive access.**

Checking the Planner

1. Select **Book - Planner**.
2. Choose the Book Owner from the drop down list.
3. Make sure the correct plan is alongside the appropriate week. If not, choose the plan from the drop down list and click on the week that plan applies to.



Planner

Extending the Books

1. Choose **Books - Extend Books**.
2. You may be warned that All forms must be closed - click **Yes** to continue.
3. Select the book(s) required or you can leave the tick in the box **All Books**.
4. Click **Extend**.
5. Click **Close**.



Extend Books