

Upgrading to Appointments Setup – A Step by Step guide

Appointments Setup is the easy way to manage:

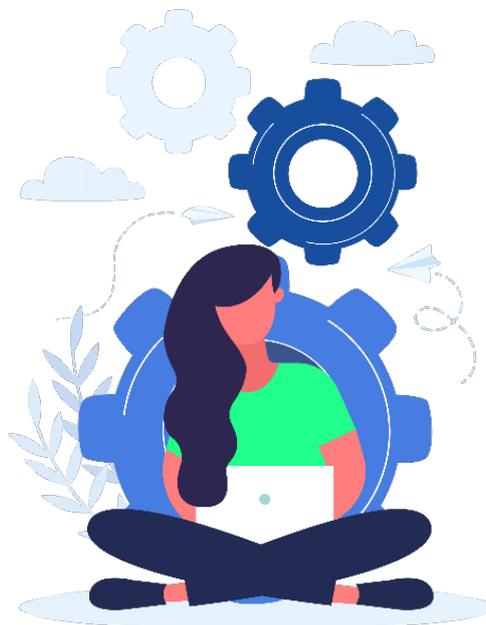
- The creation of slot types and sessions
- Extending and maintaining your appointments books.

It offers easy visuals so you can see your capacity and appointments usage at a glance, as well as offering instant overviews of a clinician's week, a selected sub-set of clinicians or a snapshot of your whole practice.

This guide details easy to follow steps, to clean up and streamline your data in **Vision 3**, ready to upgrade to the new system.

In England, moving to **Appointments Setup** gives you access to our **Appointments GP Connect** function, allowing you to share appointments with the NHS111 service, Covid Clinical Assessment Centre, and any other practices in your Federation.

To upgrade your current **Vision 3** appointment data, including slot types, sessions and weekly plans:



1. Start Using Vision Appointments

If your staff don't already use **Vision Appointments** , it is time to

start encouraging them to do so, rather than old **Appointments** . This helps everyone familiarise themselves with the modern, clean look and helps prepare everyone for the change.

 See the [Appointments Help Centre](#) for details.

2. Spring Clean your Data

Have a spring clean of your data in old Appointments. Over the years, most practices have built up obsolete or duplicate slot types, details of clinicians who no longer work at the practice and sessions that are no longer used. Removing these now makes the next step much faster and simpler.

 See [Vision 3 Appointments Help](#) for details.

3. Let Us Know You Are Ready to Go

Let us know you're ready to go. We will contact you to organise a time to upgrade your data. The upgrade happens overnight so does not impact your working day and the next morning it is ready for you to use.

 See the [Appointments Setup Learning path in the Learning Zone](#) for free online training.

