



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 review and streamline your data in Vision 3, ready to upgrade to the new system.

In England, moving to **Appointments Setup** give 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.

Exciting developments are in progress for **Appointments Setup**, including our Triage solution, which manages non time bound appointments for you, for example, clinicians' callbacks to patients, home visits, open clinics, waiting lists for specialised clinics, and many more.

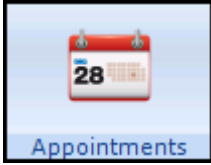
To upgrade your current Vision 3 appointment data, including slot types, sessions and weekly plans:





1. Start Using Appointments

If your staff don't already use **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. Review your Data

Review your existing data in old Vision 3 Appointments. Where you have duplicate Slots, Sessions or Session types, ensure they all have unique names, for example, GP Session am and GP Session am (2).

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





3. Run the Vision Appointments Data Analysis Reporting Tool

The **Vision Appointments Data Analysis Reporting Tool (VADAR)**, highlights any issues with your appointments data in Vision 3 that have not been addressed as part of your review (see step 2).

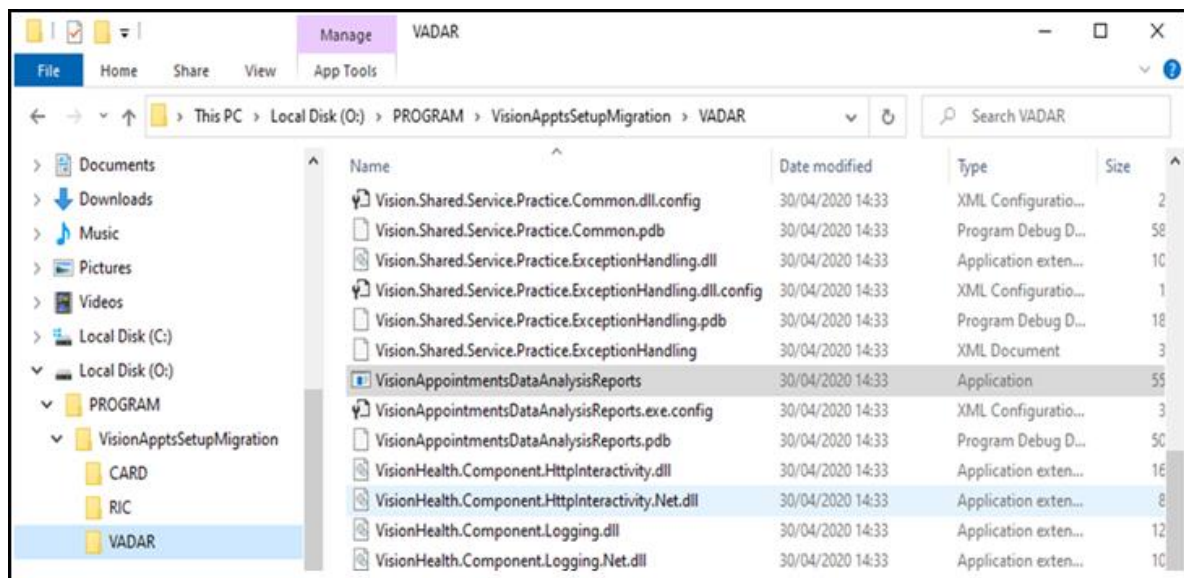
To run the VADAR tool:



Note – This only has to be run from one workstation at your practice.



1. From your workstation, open **File Explorer**.
2. Navigate to O:/PROGRAM/VisionApptsSetupMigration/VADAR:



3. Double click on the **VisionAppointmentsDataAnalysisReports** Application.
4. The **VADAR Tool** runs and produces a report of issues.
5. Instructions for addressing any issues displays on your screen. Follow the instructions to remove the anomalies.

4. Let Us Know You Are Ready to Go

Once the **VADAR** is actioned, from the final screen, select **Request Vision Appointments Setup** and select a date for your upgrade. 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.