



# Appointments

## Appointments Reporting User Guide

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# Introduction to Appointments Reporting

The **Appointments Reporting Home** page includes the **Report Library** and **Dashboard**.




From here you can select a report to view, scroll to access all reports and tap to select a report for viewing.

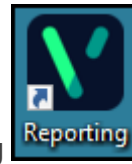


See [Navigating Appointments Reporting on page 7](#), [Viewing Reports on page 15](#) and [Report Drill Down on page 17](#) for details.


# Logging in to Appointments Reporting

To log into **Appointments Reporting**:

 **Note** - Your email address needs to be added to your staff profile in File Maintenance. See [Preparing for Vision Reporting](#) for more details.




1. From your desktop, double click **Reporting**. The login screen displays.

A screenshot of the login screen for Vision Reporting. At the top left is the Vision logo, consisting of two stylized 'V' shapes (one green, one blue) and the word 'vision' in a bold, sans-serif font, with 'A Cegecim Brand' underneath. Below the logo are two input fields: the first is labeled 'Username' and the second is labeled 'Password'. Below these fields is a green 'Sign in' button. At the bottom of the screen, there is a small disclaimer: 'Computer Misuse Act 1990' and 'Unauthorised access to this system is an offence'. On the right side of the screenshot, three arrows point from handwritten text to the input fields and button: 'Enter your email address' points to the Username field, 'Password' points to the Password field, and 'Select to log in' points to the Sign in button.

2. Select **Username** and enter your registered email address.
3. Select **Password** and enter your password.


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 **Note** - If your password does not meet the complexity requirements and contain a combination of Upper case, Lower case and Numbers. A warning displays "You are logging in with a weak password. Please contact your local Vision Admin or Helpline for assistance or press **Continue** to login with a weak password."


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4. Select **Sign in**.

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 **Note** - The first time you access **Appointments Reporting** you are asked to select your country / health board. Select the appropriate response from the available list and select **Continue**.

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vision  
A Cegecim Brand

Select your country / health board

England	▼
England	
Wales	
Northern Ireland	
Scotland	

Select country

5. If you have multiple roles within your practice or federation, select the appropriate role.

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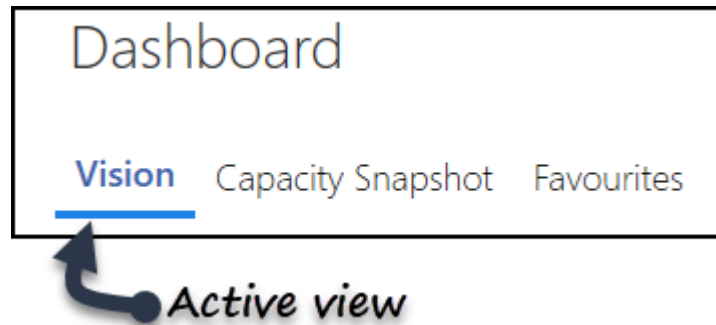
 See [Navigating Appointments Reporting on the facing page](#) for more details.

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# Navigating Appointments Reporting


## Dashboard

The Dashboard on the **Home** screen, consists of three views:




- **Vision** - Selection of useful predefined reports.

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 See [Dashboard - Vision on page 9](#) for more details.


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- **Capacity Snapshot** - Selection of reports on Offered and Cancelled Appointments.

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 See [Dashboard - Capacity Snapshot on page 11](#) for more details.

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- **Favourites** - Your most frequently used reports can be saved here for quick access.

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 See [Dashboard - Favourites on page 14](#) for more details.

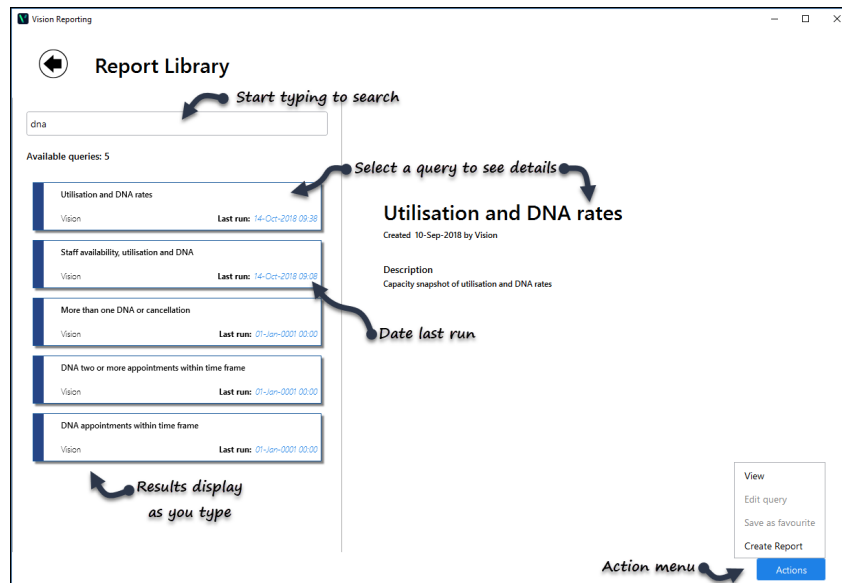
---

The active view is underlined in blue.

## Report Library

Choose a query from the Report Library, you can scroll to access more reports.

Alternatively select the **Report Library >** heading, which displays all the reports, you can quickly type into the search box to find a particular report.



For further information, select the report tile, and the details display to the right. To access the report options, select the **Actions** button.

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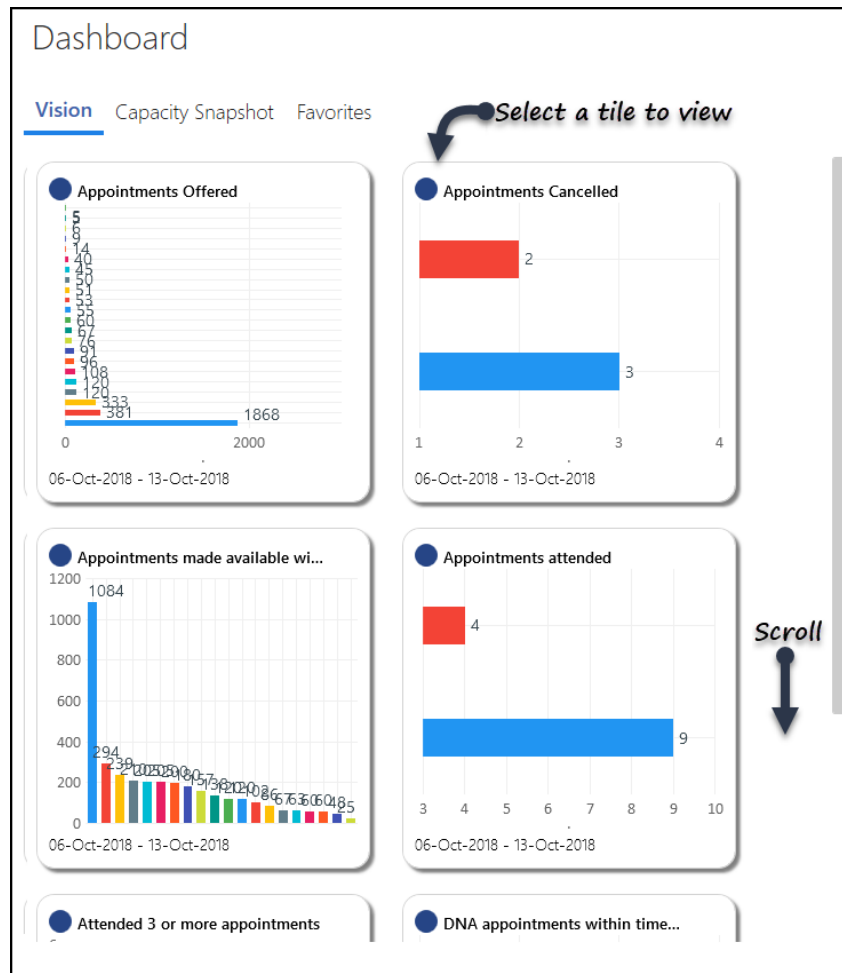
 See [Introduction to Appointments Reporting on page 4](#) for more details.

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## Dashboard - Vision

The **Vision** tab is the default view on the **Dashboard** when you sign into the **Appointments Reporting** app.



This includes the following useful reports:

- **Appointments offered**
- **Appointments Cancelled**
- **Appointments made available within core hours**
- **Appointments attended**
- **Attended 3 or more appointments**
- **DNA Appointments within a timeframe**

Select a tile to view the report.



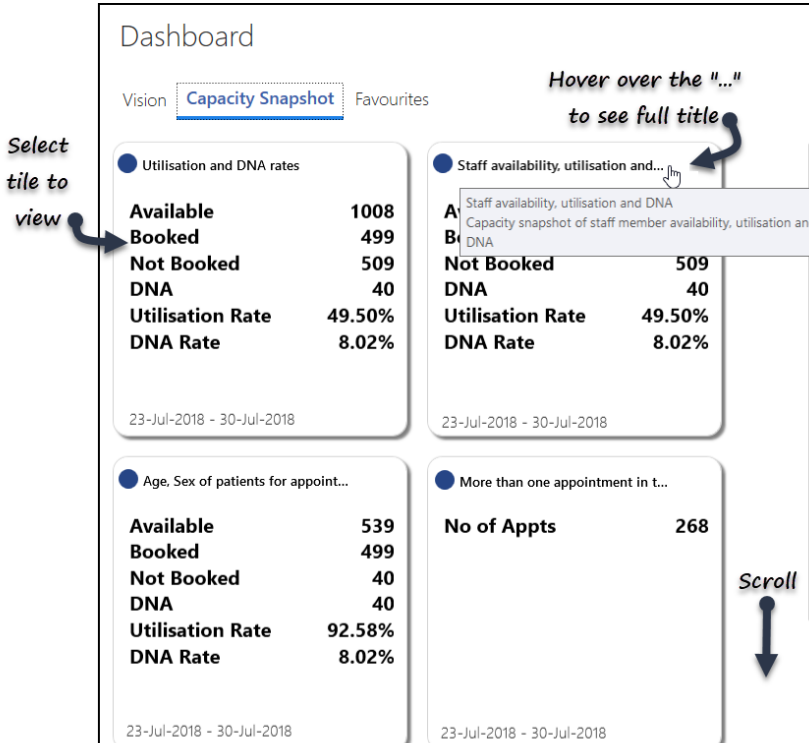
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➔ See [Viewing Reports on page 15](#) and [Report Drill Down on page 17](#) for details.

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## Dashboard - Capacity Snapshot

The **Capacity Snapshot** is on the Dashboard and includes the following reports:



**Dashboard**

Vision **Capacity Snapshot** Favourites

*Select tile to view*

*Hover over the "...\" to see full title*

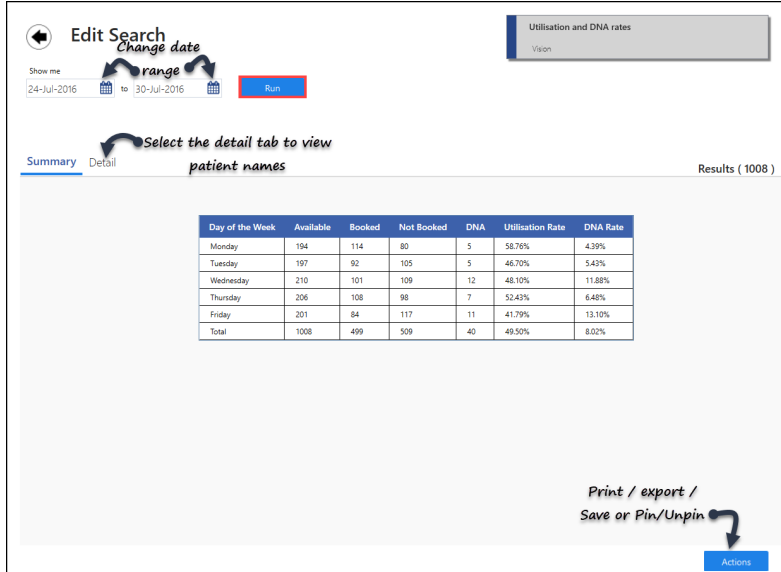
*Scroll*

Report Title	Available	Booked	Not Booked	DNA	Utilisation Rate	DNA Rate
Utilisation and DNA rates	1008	499	509	40	49.50%	8.02%
Staff availability, utilisation and DNA			509	40	49.50%	8.02%
Age, Sex of patients for appointments	539	499	40	40	92.58%	8.02%
More than one appointment in timeframe	No of Appts		268			

23-Jul-2018 - 30-Jul-2018

- Utilisation and DNA Rates
- Staff Availability, Utilisation and DNA
- Age, Sex of patients for appointments
- More than one appointment in Timeframe
- More than one DNA or Cancellation in Timeframe

1. Select a tile to view a report.



Utilisation and DNA rates

24-Jul-2016 to 30-Jul-2016 Run

Summary Detail *Select the detail tab to view patient names*

Results ( 1008 )

Day of the Week	Available	Booked	Not Booked	DNA	Utilisation Rate	DNA Rate
Monday	194	114	80	5	58.76%	4.39%
Tuesday	197	92	105	5	46.70%	5.43%
Wednesday	210	101	109	12	48.10%	11.88%
Thursday	206	108	98	7	52.43%	6.48%
Friday	201	84	117	11	41.79%	13.10%
Total	1008	499	509	40	49.50%	8.02%

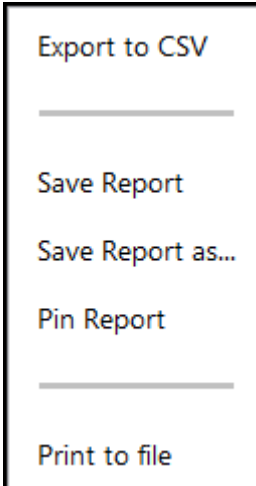
Print / export / Save or Pin/Unpin

Actions

2. The **Capacity Reports** display as a table and the view cannot be changed unless you use **Report Save As** to create a new query.

3. Select the **Detailed** tab to view a list of patient names.

4. Select **Actions**  to:



Export to CSV

Save Report

Save Report as...

Pin Report

Print to file

- **Export to CSV**
- **Save Report** - To preserve filters, group and sort by preferences.
- **Save Report As** - Save the report under a different name.

- **Pin / Unpin Report** - Adds or removes the report with the current filters, group and sort preferences to the **Favourites** Dashboard.
- **Print to File** - Includes output to PDF.



5. Select the **Back arrow** to return to the previous screen.



**Note** - Drilldown is not available in the Capacity Reports.

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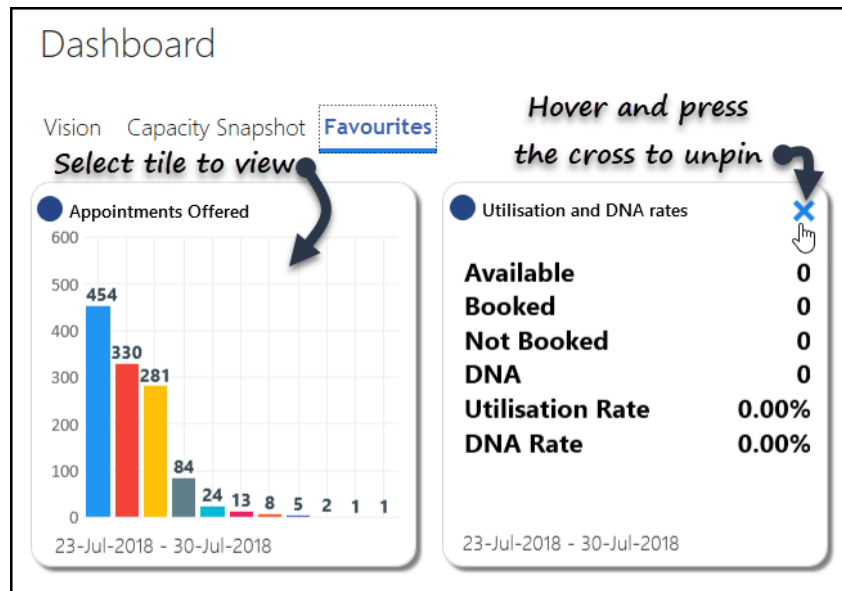


See [Navigating Appointments Reporting on page 7](#) for more details.

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## Dashboard - Favourites

You can pin your favourite reports for quick easy access:



To remove a report from the favourites, hover and then select the **X** to remove.

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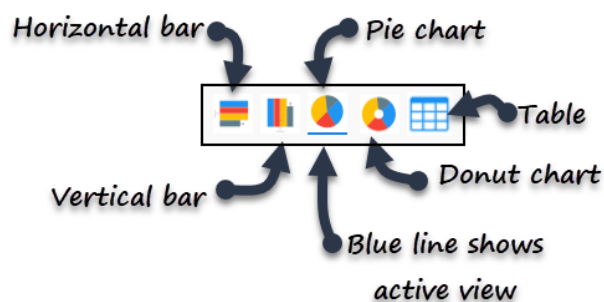
➔ See [Viewing Reports on the facing page](#) and [Report Drill Down on page 17](#) for details.

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## Viewing Reports


To view and filter reports:

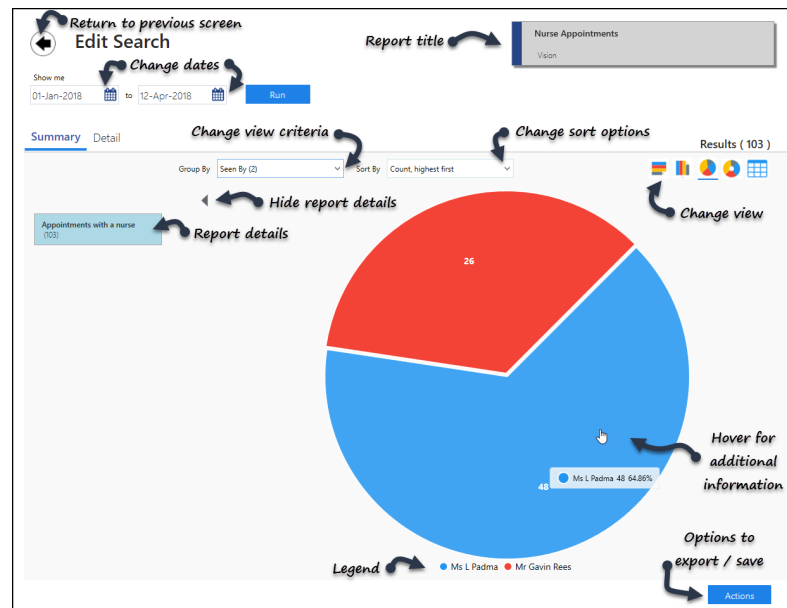
1. Select a report from the Report Library or Dashboard. In the Report Library you can use the **Search bar** to quickly find the report. The report displays.
2. Change the report type if required:
  - **Bar** - Horizontal or Vertical
  - **Chart** - Pie or Donut
  - **Table** - Summary Table



A blue line displays under the active view.

3. Optionally, select the **Calendar**  to change the dates.
4. Select **Run**.
5. Select the **Group By** drop down to change the view criteria. The criteria varies by report, and the number in brackets indicates how many matches for the criteria.
6. Select the **Sort By** drop down to change the view options. Choose from:
  - Count, highest first
  - Count, lowest first
  - Type

 **Note** - If the selected **Group By** criteria is **Week**, then choosing **Type** displays the results by day order.



7. Select the **Actions**  button to:

- **Export to CSV**
- **Save Report** - To preserve filters, group and sort by preferences.
- **Save Report As** - Save the report under a different name.
- **Pin / Unpin Report** - Adds or removes the report with the current filters, group and sort preferences to the Favourites Dashboard.
- **Print to File** - Includes output to PDF.

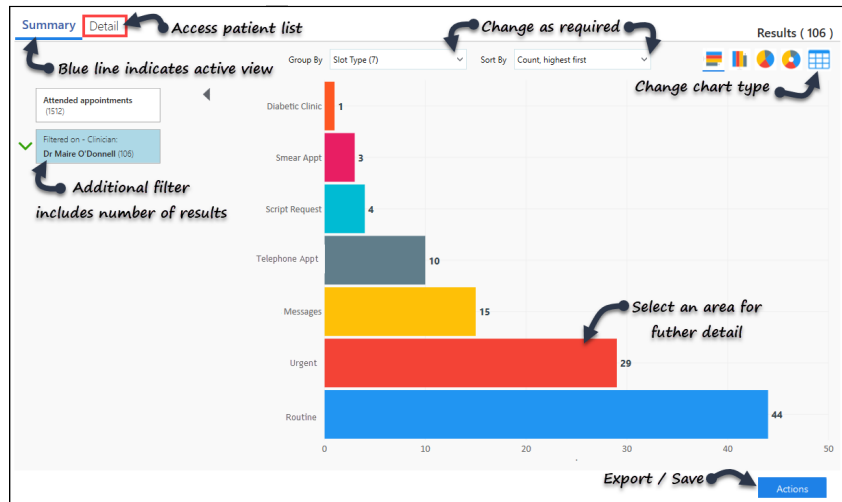
8. Select the **Back arrow**  to return to the previous screen.

 See [Report Drill Down on the facing page](#) for more details.



# Report Drill Down

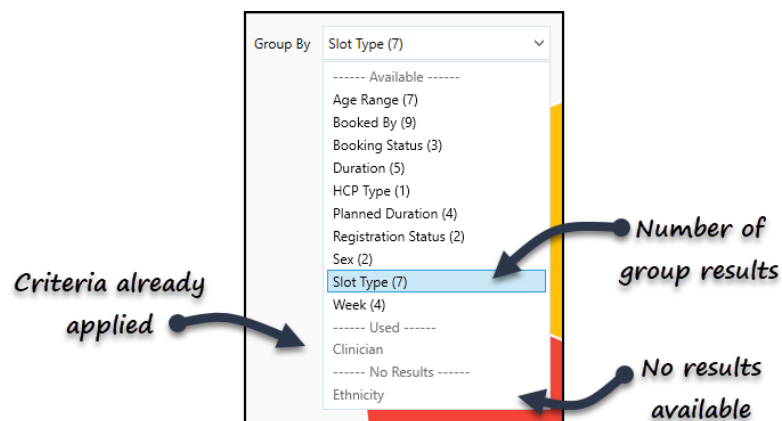
Once a report is selected you can drill down for further information:



1. Select a report and apply **Date / Group / Sort** options as required.

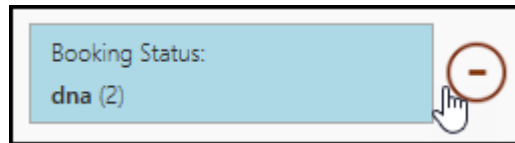
 See [Viewing Reports on page 15](#) for more details.

2. Select an area of the chart you want to find out more about, for example, click a specific clinician's appointments. A filter applies and the view refreshes.
3. If required change the **Group By** and **Sort By** options. As you select the drop down lists, a number in brackets indicates the number of results by category.

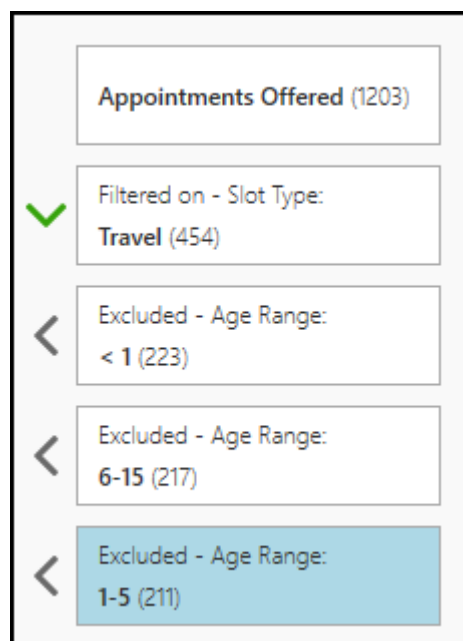


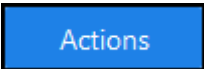
4. Another area, for example **Slot Type**, can be selected. The view refreshes.

5. To remove a filter from the **Summary** view, hover next to the filter box and a '-' appears, click to remove.



6. Again, update the **Group By** and **Sort By** options if required.
7. Optionally, if you wish to remove a column / segment from the view, right click to exclude. The column / segment is taken out, and displays on the left hand side as **Excluded**.



8. To remove the exclusion, hover next to the box and to activate the "-" sign, and select.
9. Select the **Detail** tab to view a patient list. To return to the **Summary** view, select the **Summary** tab. A blue line indicates the active tab.
10. Select the **Actions**  button to:

- **Export the report** - to CSV
- **Save Report** - preserve filters, group and sort by preferences
- **Save Report As**- preserve filters, group and sort by preferences

- **Pin / Unpin Report** - adds or removes the report with the current filters, group and sort preferences to the **Favourites** Dashboard
- **Print to File** - includes the option to print to PDF



11. Select the **Back arrow** to return to the previous screen.



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See [Viewing Reports on page 15](#) for more details.

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## Create Reports Overview

From the Report Library you can quickly create new reports based on the existing selections, and then add additional subsets of patients from the options available.

You can then set the **Group By** options and default time period.

← Create Report

Scheduled Hcptype Gp	Scheduled Hcptype Nurse
Scheduled Hcptype Other Clinical	Scheduled Hcptype Other
Patient Sex Male	Patient Sex Female
Patient Ethnicity White	Patient Ethnicity Mixed
Patient Ethnicity Asian	Patient Ethnicity Black
Patient Ethnicity Other	Patient Ethnicity Unknown
Patient Age Under 1	Patient Age 1-5 Inclusive
Patient Age 6-15 Inclusive	Cancelled 2 Or More Appointme...
Dna 2 Or More Appointments	Dna
Patient Age 16-45 Inclusive	Patient Age 46-64 Inclusive
Patient Age 65-80 Inclusive	Patient Age 81 And Over
Attended 3 Or More Appointme...	

**INFO:** To create your own query, click on a pre-defined query from the list on the left side. You can add more queries by clicking the + button which appears when you put your mouse over the textbox.

Attended 3 Or More Appointments
+

*Choose an existing query* →

*Select to add further queries if required* →

*Click Next to proceed* →

Next

---

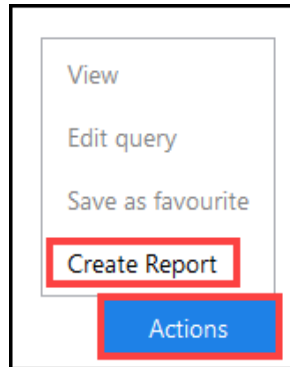
➔ See [Create Report on the facing page](#) for more details.

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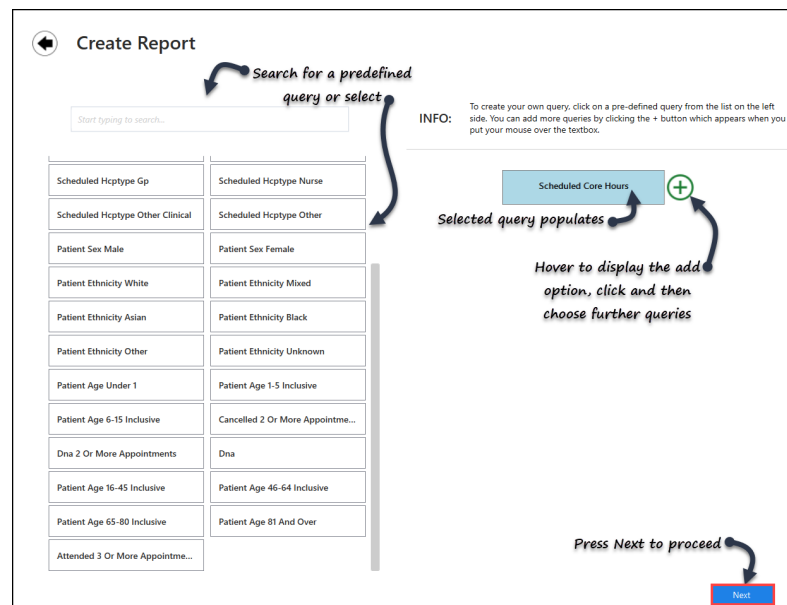
# Create Report

You can quickly create reports using the predefined queries.

1. Select the **Report Library >** heading.
2. The Report Library opens.
3. Select the **Actions** button in the bottom right corner of the screen:



4. Select **Create Report**. The new report screen displays.
5. Select a query from the list on the left hand side of the screen or use the **Search** box. For example, **Scheduled Core Hours**:



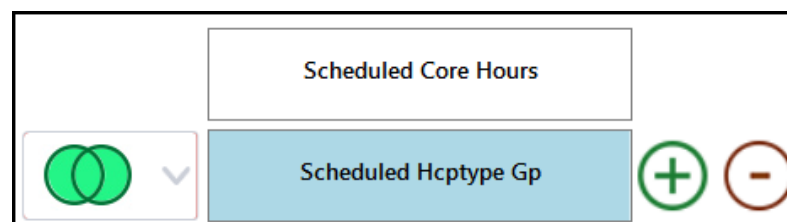
6. To add further criteria, hover near the **text box** and select the **Add** button. A second **text box** displays.




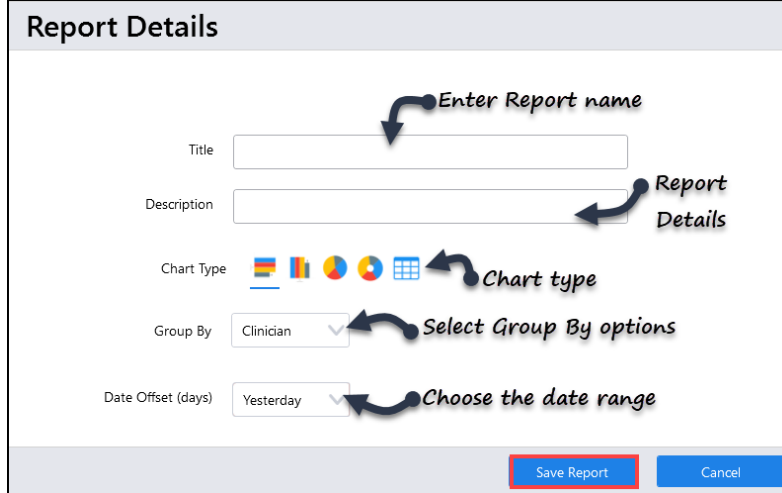
7. Select an additional Query from the list. For example, **Scheduled HCP type GP**, to show GP appointments.
8. Define the relationship between the groups:



- **Add all patients** (default) - Keeps all the patients in the groups
  - **Keep only common patients** - Keeps only patients that are in both groups
  - **Keep patients exclusively in the first group** - Removes any patients that are in the both groups and does not import any patients in the joining group.
  - **Keeps patients exclusively in the joining group** - Removes all patients from the first group, including any patients who are in both groups.
  - **Remove common patients** - Removes any patients that are in both groups.
9. To add further queries or remove a query, hover over the report detail box to activate the **Add** and **Remove** buttons:



10. Click the **Next**  button in the bottom right of the screen to proceed.
11. Complete the **Report Details** form:



- **Title** - Report Name
  - **Description** - Report Details
  - **Chart Type** - Display options - Bar / Chart / Table
  - **Group By** - Select the group by options from the drop down list
  - **Date Offset (days)** - Choose the date range for the report from the drop down list.
12. Select **Save Report** to proceed, alternatively choose **Cancel** to delete.
13. The new report is available in the Report Library.

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 See [Viewing Reports on page 15](#) and [Report Drill Down on page 17](#) for more details.

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## Query Library

The predefined library includes the following:

- Appointments Cancelled
- Appointments Offered
- Appointments made available within core hours
- Appointments attended
- Attended 3 or more appointments
- Appointments with GP
- Appointments made available within extended hours
- Appointments made available with a duration less than 10
- Appointments made available with a duration more than 10
- Appointments booked in core hours
- Appointments booked in extended hours
- Cancelled two or more appointments within time frame
- DNA two or more appointments within time frame
- DNA appointments within time frame
- Utilisation and DNA rates
- Staff availability, utilisation and DNA
- Age, Sex of patients for appointments
- More than one appointment in timeframe
- More than one DNA or cancellation



**English Practices** - A monthly CSV file is produced based on the above reports for the previous month and sent automatically to NHS Digital, if your practice has given consent for the extract.



See [Viewing Reports on page 15](#) and [Report Drill Down on page 17](#) for more details.

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## Definitions

### Routine/Standard/Normal

Number of slots scheduled of type Routine/Standard/Normal etc. i.e. NOT slots released for booking on the day of appointment or specialist clinics;

### Core Hours

Core hours defined as 8:00 - 18:30 on weekdays except Good Friday, Christmas Day or bank holidays, as set out in the GMS contract.

Based on appointment start time i.e. a 10 minute appointment scheduled to start at 6.25pm will be counted as a core hours appointment; an appointment scheduled to start at 8am will also be counted as a core hours appointment; an appointment scheduled to start at 6.30pm will be counted as an extended hours appointment.



See [Healthcare Professional Definitions on page 28](#) for more details.

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## Ethnicity Codes

The following Ethnicity group codes (NHS Digital 2016 grouping), are used when creating Ethnicity Reports:

Description	Read V2	CTV3
White: English or Welsh or Scottish or Northern Irish or British	9t00., 9i00.	XactH , XaQEa
White: Irish	9t01., 9i10.	XactI , XaQEb
White: Gypsy or Irish Traveller	9t02., 9i2E., 9i2C., 9i2D.	XactJ , XaJSD , XaJSB , XaJSC
White: Any other White background	9t03.	XactK
Mixed or multiple ethnic groups: White and Black Caribbean	9t04., 9i3..	XactL , XaJQy
Mixed or multiple ethnic groups: White and Black African	9t05.	Xactd
Mixed or multiple ethnic groups: White and Asian	9t06., 9i5..	Xacte , XaJR0
Mixed or multiple ethnic groups: Any other Mixed or multiple ethnic background	9t07.	Xactf
Asian or Asian British: Indian	9t08., 9i7..	Xactg , XaJR2
Asian or Asian British: Pakistani	9t09., 9i8..	Xacth , XaJR3
Asian or Asian British: Bangladeshi	9t0A., 9i9..	Xacti , XaJR4
Asian or Asian British: Chinese	9t0B., 9i64., 9iE..	Xactj , XaJRL , XaJR9
Asian or Asian British: Any other Asian background	9t0C.	Xactk
Black or African or Caribbean or Black British: African	9t0D.	Xactl
Black or African or Caribbean or Black British: Caribbean	9t0E.	Xactm
Black or African or Caribbean or Black British: Any other Black or African or Caribbean background	9t0F.	Xactn



Description	Read V2	CTV3
Other ethnic group: Arab	9t0G., 9iF9.	Xacto, XaJSS
Other ethnic group: Any other ethnic group	9t0H., 9iFK., 9iF..	Xactp, XaJSg , XaJRA
Not stated	9iG..	XaJRB

## Healthcare Professional Definitions

The roles for the appointments reporting identified in **Vision 3** and are defined as follows:

### GP

- Senior Partner
- Partner
- Associate
- Non-commercial local rota of less than 10 GPs
- Locum
- GP Registrar
- Sole Practitioner
- Salaried Partner
- GP Retainer

### Nurse

- Clinical Practitioner Access Role
- Community Nurse
- Community Psychiatric Nurse
- Contact Tracing Nurse
- Health Professional Access Role
- Health Visitor
- Mental Handicap Nurse
- Midwife
- Nurse Access Role
- Nurse Manager Access Role
- Other Nursing & Midwifery



- Practice Nurse
- School Nurse

### **Clinical Other**

- Chiropodist
- Counsellor
- Dietician
- Dispenser
- Homeopath
- Occupational Therapist
- Osteopath
- Other Health Care Professional
- Pharmacist
- Physiotherapist
- Social Worker
- Speech Therapist
- Stomatherapist

### **Non-clinical Other**

- Any other healthcare professional type, including clerical user types.

