Vision Shared Appointments
Quick Reference Guide for Reception Staff

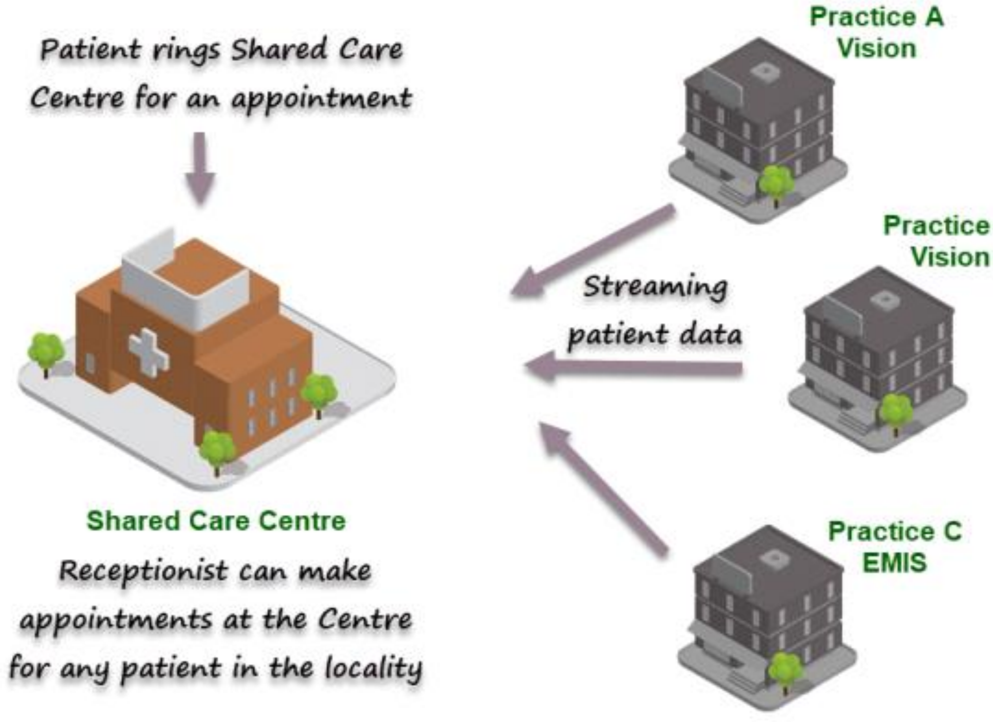
Vision Shared Appointments allows for the sharing of appointments books beyond the practice boundary. Using Shared Appointments you can view, book and cancel patient appointments for a Shared Care service.

The solution can be used to support:

- Multiple practices located within the same building sharing reception staff/nursing staff.
- Shared Care working e.g. Prime Minister's Challenge Fund for practices provisioning extended working hours across a locality.
- Extended Access.

Shared Appointments works with both Vision and EMIS practices, and can be configured in multiple ways:

- A patient can for example, contact their practice for an appointment, and if one isn't available then the practice can book the patient into the Shared Care Centre.
- Alternatively, a patient can contact the Shared Care Centre directly, and the receptionist can book an appointment at the centre for any patient in the defined locality.



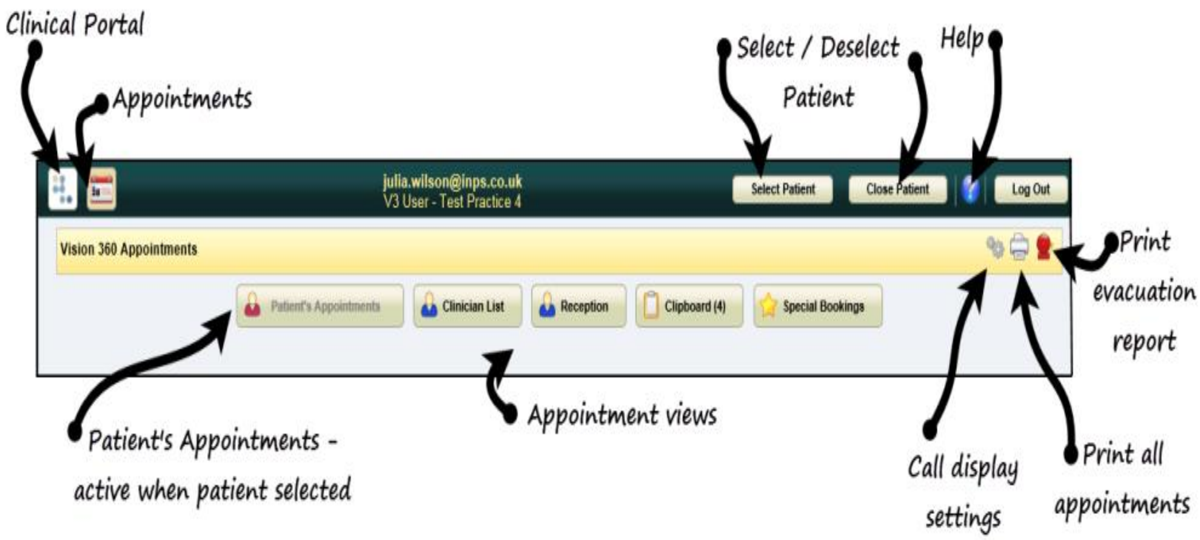
Note - Vision Shared Appointments works with both Vision and EMIS practices.

Home Screen Overview

Vision Shared Appointments **Home** screen.

From here you can:

- Return to **Clinical Portal** menu.
- Select / Deselect Patients.
  See - Select a Patient on page 6.
- Access the different Appointment views.
  Set Call Display settings.
- Print Appointment reports.
- Print Emergency Evacuation report.



Vision Shared Appointments Overview

Patient's Appointments	Displays the appointments booked for the patient, you can also book new appointments and manage existing bookings.
Clinician List	Displays appointments by clinician/clinic including appointment comments.
Reception	Displays multiple clinician/clinic books.
Clipboard	Allows you to move bookings, the number in brackets indicates the count of appointments on the clipboard.
Special Bookings	Allows you to book appointments for temporary/non-registered patients or 3rd parties.
Evacuation Report	Prints the emergency evacuation report.
Print	Displays the Print Full Appointment List screen allowing you to specify which data to include and exclude in the printed list of appointments.

When a patient is selected, the **Patient's Appointments** view is displayed by default.

Accessing Shared Appointments

Vision Shared Appointments is accessed from the **Clinical Portal.**

1. Double-click on the **Clinical Portal**  icon on your desktop.
   The **Clinical Portal** login screen displays.

2. Enter your **User Name** and **Password**.

   Note - Your user name is your email address.
   Vision practices - use your Vision 3 password. For English sites this is the offline password.

3. Select your **Organisation** from the drop down.
4. Select **Sign In**.

   Note - If you have forgotten your password, it can be reset it by your systems administrator.

   The **Clinical Portal** main screen displays:

5. Select the **Appointments** button.
   The **Appointments** screen displays.

Select a Patient

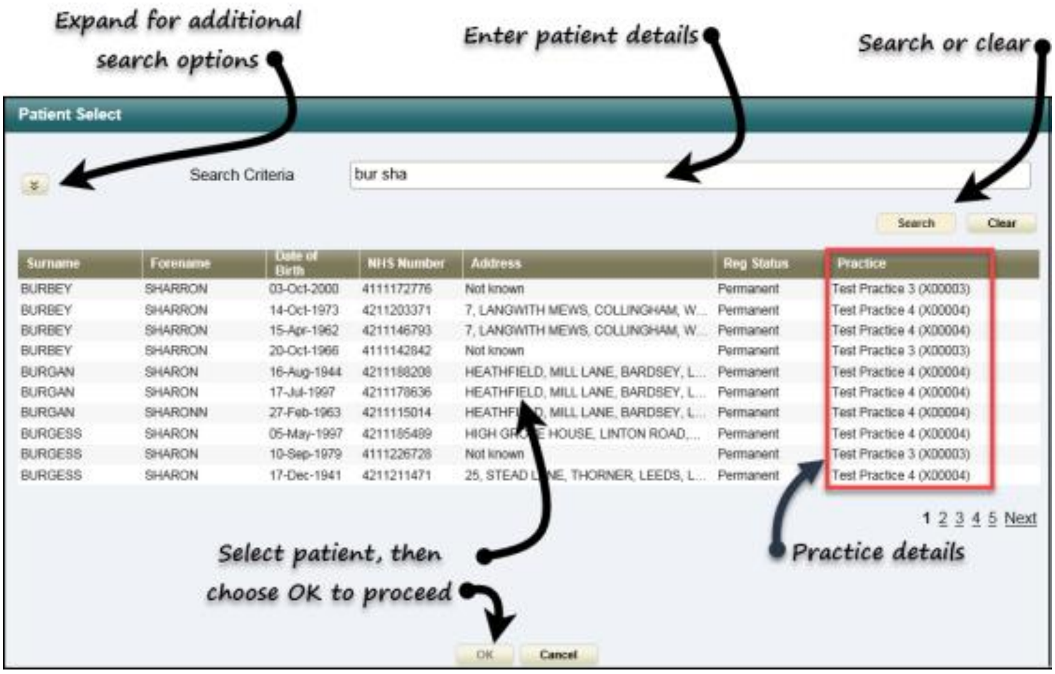
The **Patient Select** screen allows you to search for a patient using various criteria including surname, date of birth and NHS/CHI number.

When a patient is selected their demographics display in the **Patient Banner**.

Note - If you already have a patient open and you choose a different patient, the currently selected patient record will be closed.

Patient Search

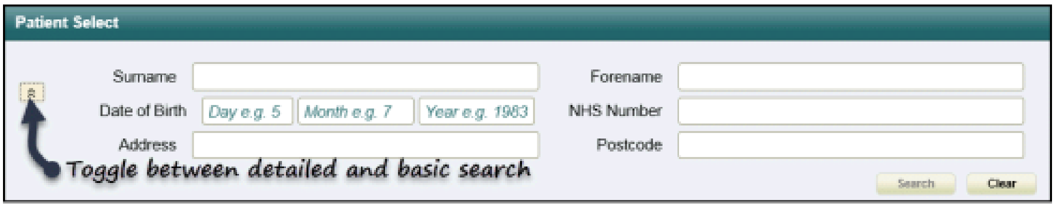
1. Click the **Select Patient**  button.
2. Entering all or part of the patient's surname, optionally forename and/or date of birth in the **Search Criteria** box:



3. Click **Search**.
4. Select the patient and click **OK**.

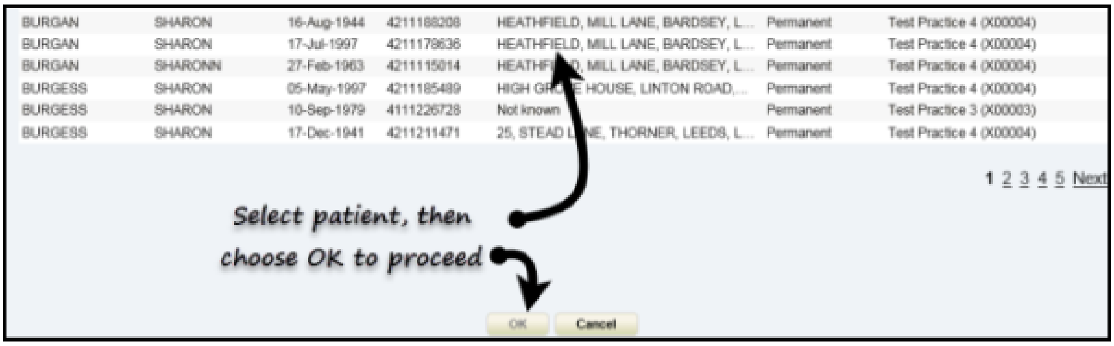
Detailed Patient Search

1. Click the **Expand** button  to activate more search options, which include **Address**, **Postcode** and **NHS/CHI Number**.



2. Enter patient details.

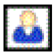
   Note - To search by postcode, a minimum of two characters must be entered in the Postcode box.
3. Click **Search**.
4. Select the patient and click **OK**.



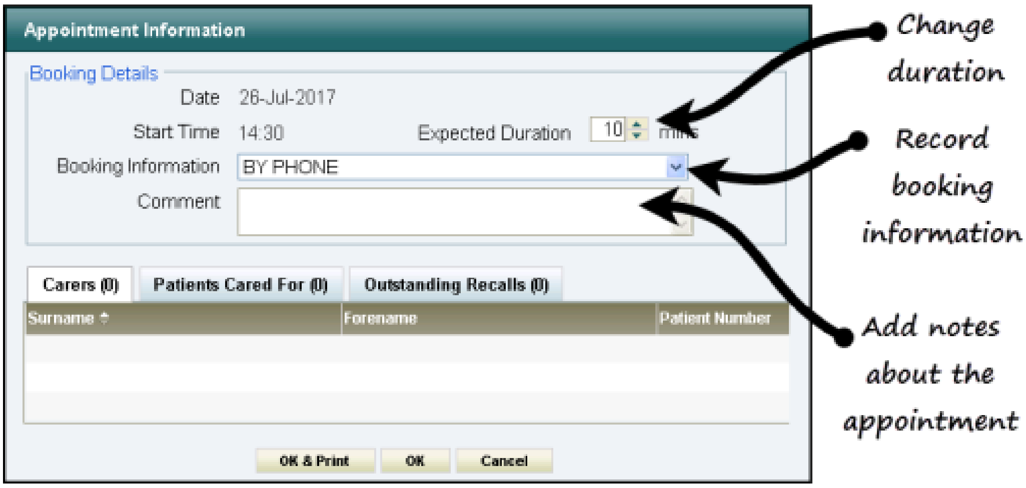
Deselect Patient

The active patient showing in the **Patient Banner** can be deselected by either choosing another patient or selecting the **Close Patient**  button.

Booking an Appointment - Reception View

1. Select **Reception**  button.
   Reception view displays.
2. Select the slot and double click or select the **Make booking**  button.
   The **Patient Select** screen displays.
3. Select a patient. See - Select a Patient on page 6.
   > **Note** - If you already have an active patient displayed in the patient banner, selecting a patient does not change the active patient.

   The **Appointment Information** booking form displays:



4. Update the booking form as required:

   - Extend the duration.
   - Record booking information via the dropdown list.
   - Add comments relating to the appointment.

   In a shared care setting, appointments for patients who are registered at an EMIS practice and no sharing agreement exists, are booked as special bookings with demographic information populated.

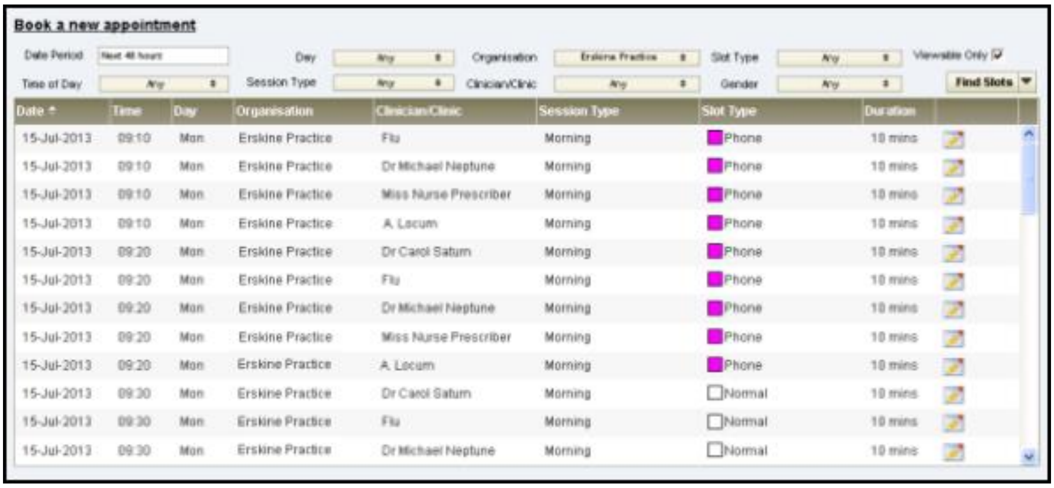
   See - Making a Special Booking on page 13.

4. Select **OK** to finish, or select **OK & Print** to issue an appointment card.
5. A booking confirmation message displays.

Book an Appointment - Patients View

1. Click the **Select Patient**  button.

   See - Select a Patient on page 6.
   The **Patient's Appointment** view displays.
   Book a new appointment section at the lower part of the screen shows the next available appointments.



Date	Time	Day	Organisation	Clinician/Clinic	Session Type	Slot Type	Duration
15-Jul-2013	09:10	Mon	Erskine Practice	Flu	Morning	Phone	10 mins
15-Jul-2013	09:10	Mon	Erskine Practice	Dr Michael Neptune	Morning	Phone	10 mins
15-Jul-2013	09:10	Mon	Erskine Practice	Miss Nurse Prescriber	Morning	Phone	10 mins
15-Jul-2013	09:10	Mon	Erskine Practice	A. Locum	Morning	Phone	10 mins
15-Jul-2013	09:20	Mon	Erskine Practice	Dr Carol Saturn	Morning	Phone	10 mins
15-Jul-2013	09:20	Mon	Erskine Practice	Flu	Morning	Phone	10 mins
15-Jul-2013	09:20	Mon	Erskine Practice	Dr Michael Neptune	Morning	Phone	10 mins
15-Jul-2013	09:20	Mon	Erskine Practice	Miss Nurse Prescriber	Morning	Phone	10 mins
15-Jul-2013	09:20	Mon	Erskine Practice	A. Locum	Morning	Phone	10 mins
15-Jul-2013	09:30	Mon	Erskine Practice	Dr Carol Saturn	Morning	Normal	10 mins
15-Jul-2013	09:30	Mon	Erskine Practice	Flu	Morning	Normal	10 mins
15-Jul-2013	09:30	Mon	Erskine Practice	Dr Michael Neptune	Morning	Normal	10 mins

2. Use the filters to refine the appointments.
   Or select the **Find Slots** dropdown to display a list of saved slot searches and select the search you want to run.

Date	Time	Day	Organisation	Clinician/Clinic	Session Type	Slot Type	Duration
31-Jul-2017	14:10	Mon	Test Practice 4	Diabetic Clinic	Diabetic Clinic	Diabetic Clinic	10 mins
31-Jul-2017	14:10	Mon	Test Practice 4	Miss Nurse Prescriber	Baby Clinic	Normal	5 mins
31-Jul-2017	14:15	Mon	Test Practice 4	Miss Nurse Prescriber	Baby Clinic	Normal	5 mins

Available filters:

Date period - click the box to display options

- Next 48 hours (default)
- This week
- Next week
- This month
- Next month
- Specific date - Opens the calendar.
- Date range - Opens the calendar.

Day

- **Any** (default)

- Select a specific day(s).

Time of day

- **Any** (default)
- Select **AM** or **PM**

Gender - The clinician's gender, choose from:

- **Any**
- Select **Male** or **Female**

Additional options

- **Organisation -** Location of appointment.
- **Slot Type** - All active slot types. (Default - all)
  Multiple select is available.
- **Viewable Only** - This hides slots that are marked as non-viewable.
- **Session Type** - The active session types. (Default - all)
  Multiple select is available.
- **Clinician/Clinic** - The clinicians/clinics for the selected organisation. (Default - all)
  Multiple select is available.

Note - See - Slot Type Warnings for details on slot types and associated warnings.

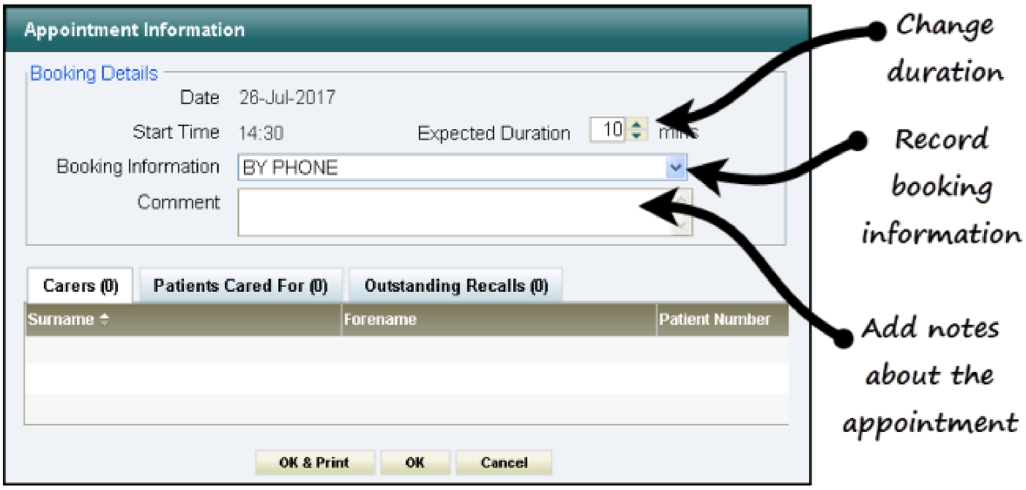
3. Select the **Find Slots** button.
   The list of available slots displays. This is ordered by date and time ascending, if you select another column to sort by, this is applied as a secondary sort.

   Note - If the number of matching slots exceeds 50, the following message displays: 'There are more than 50 available slots – the first 50 only are listed here'.

4. To book, select the **Make booking** button or double-click the slot.

   Note - You can book inactive slots - these are shown with a black slot type.

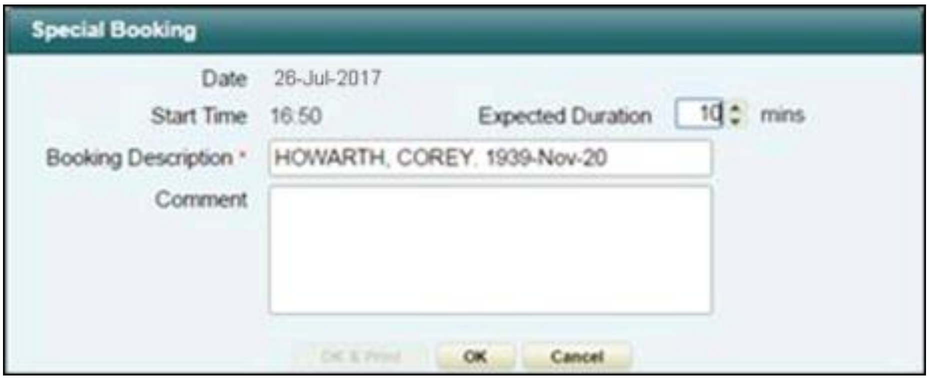
   The **Appointment Information** booking screen opens:



Options available:

- Extend the duration.
- Record booking information via the dropdown list.
- Add comments relating to the appointment.

In a shared care setting, appointments for patients who are registered at an EMIS practice and no sharing agreement exists, are booked as special bookings with demographic information populated.

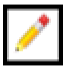


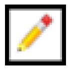
See - Making a Special Booking on page 13.

5. Select **OK** to finish, or select **OK & Print** to issue an appointment card.
6. A booking confirmation message displays.

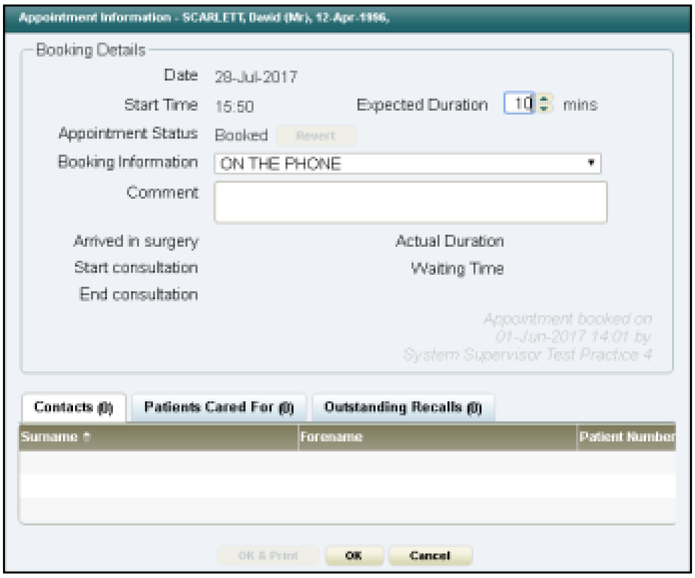
Edit an Appointment

You can edit patient appointments in **Patient's Appointments** and **Reception** views.

1. In the **Booked appointments** section of the **Patient's Appointments** view, click the edit  button.

   In the **Reception** view, highlight the appointment and click the edit  button.

   The **Appointment Information** screen displays:

2. Edit the booking form:
   - Extend the slot duration in the **Expected Duration** box.
     If the extended slot overruns any subsequent slots, you will receive a warning.
     See - Extending an Appointment Duration and Overrun Slots Warning.
   - The **Revert** button reverts the status from **Arrived** back to **Booked**, or from **In Consultation** to **Arrived**.
   - Add or edit a comment in the **Comment** box.
3. Click on **OK** to make the changes.

You can also **Move** an appointment to the **Clipboard** for re-scheduling later on.

Making a Special Booking

You can make special bookings for:

- Non-registered patient appointments.
- Non-patient appointments eg appointment with drug rep.
- In a shared care setting, patients who are registered at an EMIS practice, and a sharing agreement is not in place, are automatically booked as special bookings with all demographic information populated.

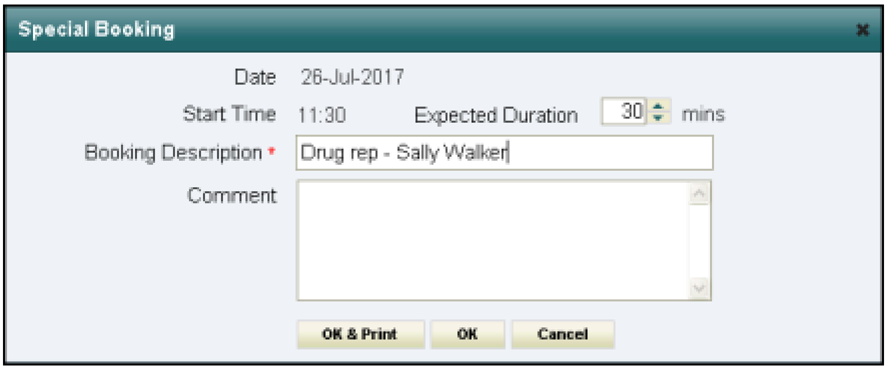
Making a special booking:

1. Click the **Special Bookings** button, at the top of the window. The **Special Bookings** view displays.
2. In the **Book a new appointment** section, select the **Organisation**.
3. Apply filters using the dropdown boxes if required.
4. Select the **Find Slots** Find Slots button. Matching slots display.

   The list of available slots is ordered by date and time ascending. If you select another column to sort by, the date and time is applied as a secondary sort.

   Note - If the number of matching slots exceeds 50, the following message displays: 'There are more than 50 available slots - the first 50 only are listed here'.
5. Double-click the slot, or click on the **Make booking** button to book.

   Note - You can also book inactive slots shown with the black slot type colour.
6. The **Special Booking** form displays the appointment details.



7. Enter the description in the **Booking Description** box, eg Drug rep - Sally Walker.
8. Record contact details In the **Comment** box. (Optional)
9. Click on **OK** to finish, or **OK & Print -** to print a label.
10. The booking confirmation message displays.

The special booking is now displayed in the **Booked appointments** section of the **Special Bookings** view.

The booking displays in the **Reception** and **Clinician List** view - indicated by the **Special Booking**  icon.

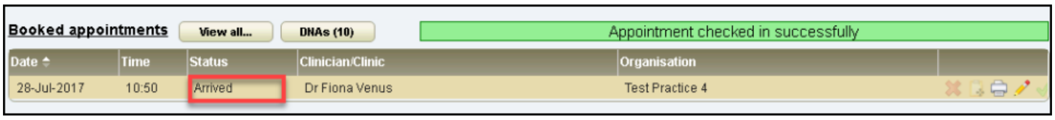
Check Patient in

You can mark a patient as arrived from the **Patient's Appointments** and **Reception** views:

Patient's Appointments View

1. Select a patient. See - Select a Patient on page 6.
   The **Patient's Appointments** view displays.
2. Locate today's appointment in the **Booked appointments** list, and select the green **Check In**  button.

   The status updates to **Arrived**, and the confirmation message displays.

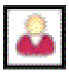
   

   Note - once the patient has been checked in, the check in button alongside the appointment is disabled.

The **Arrived in Surgery** time is recorded and displays in the **Appointment Information** booking screen.

Reception View

1. Click the **Reception**  button.
   The **Reception** view displays.
2. Select the relevant organisation from the **Organisation** dropdown.
3. Select the clinic/clinicians using the **View** button.
4. Locate the booked appointment.
5. Double-click the slot to check the patient in.

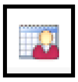
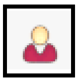
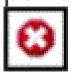
   The status changes to **Arrived**  and the confirmation displays.

See - Patient Status on page 16 and Revert Patient Status on page 17.

Patient Status

The **Clinician** and **Reception** views use the following symbols to represent the patient status.

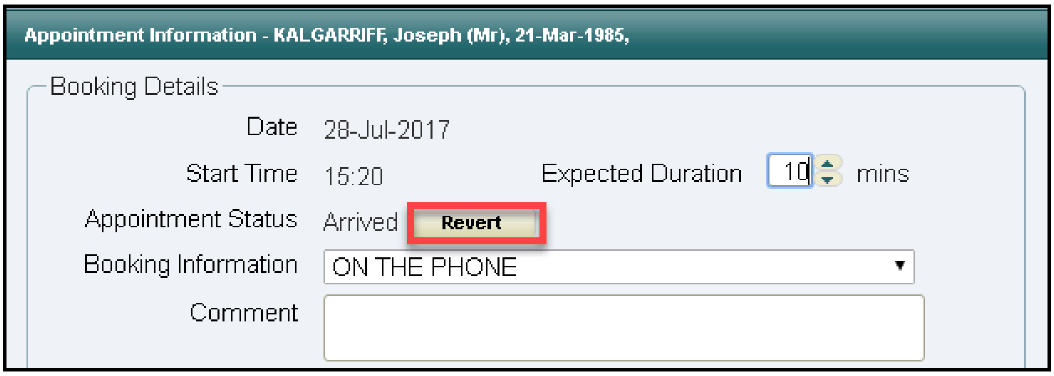
-  - Booked Appointment
  See - Booking an Appointment - Reception View on page 8.
-  - Patient Arrived
  See - Check Patient in on page 15.
-  - Patient in Consultation
  Status is updated automatically when a clinician starts a consultation.
-  - Patient has been Seen
  Status is updated when a consultation is opened with the next patient, or this can be ended manually by clicking the **End Appointment**  button.
-  - DNA
  If the patient is not checked in, and their appointment time has lapsed, the status updates to DNA.

A patient status can also be reverted. See - Revert Patient Status on page 17.

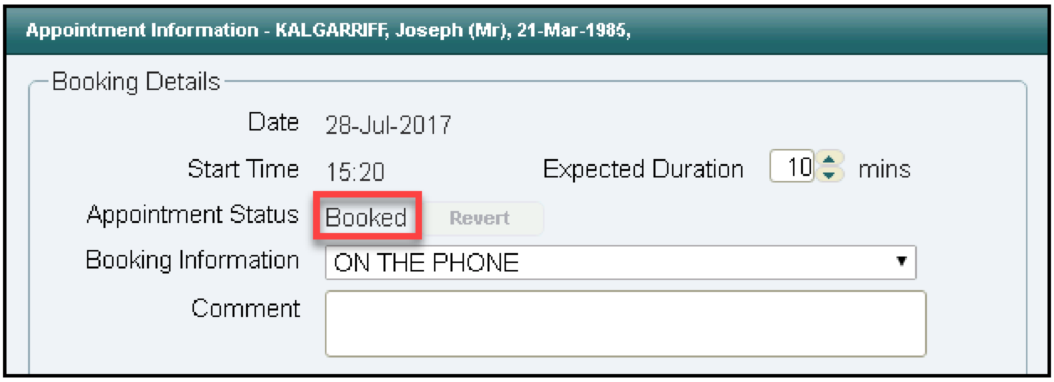
Revert Patient Status

You can revert a patient's appointment status from **Arrived** back to **Booked**, or from **In Consultation** back to **Arrived**.

1. Select a patient. See - Select a Patient on page 6.
   Patient view displays.
2. In the **Booked Appointments** section, locate the appointment you want to edit.
3. Click the **Edit Appointment**  button.
   The **Appointment Information** booking screen displays.
4. Click the **Revert** button alongside the **Appointment Status** to revert the appointment status.

   The status reverts to **Booked**

5. Click **OK** to confirm.