Vision Online Services

Configuration User Guide For:

Online Appointments

Online Repeats

Table of Editions and Contents

Date	Version	Contents	Output
8/1/11	001	Draft compiled – split from main user Guide	Docx & PDF
24/06/11	002	Updated for VONREP	Docx & PDF
01/08/11	003	Updated following review by ESTU	Docx & PDF
09/09/11	004	Updated following Workflow Review by SLEW & CSMI	Docx & PDF
12/09/11	005	Updated to VOSAPP2`	Docx & PDF
21/09/11	006	Updated following Review by ESTU	Docx & PDF
12/10/11	007	Updated Clinicians Gender and Special Interest details.	Docx & PDF
23/11/11	008	Updated Add Gender and Special Interests to include GP Role. All images updated.	Docx & PDF
28/11/11	009	Updated NHS Mail details as per instruction from CSMI. Updated following review by ESTU	Docx & PDF
08/02/12	010	Updated to remove references to Tomcat as per instruction from CSMI. Updated Global images following changed for NHS Mail.	Docx & PDF
17/02/12	011	NHS Mail details updated to include details of NHS Mail password expiration and need to reset password.	Docx & PDF
31/05/12	012	DNA details updated – As of 31/05/12 patients can't view DNA's. Cancellation reason note added – if no reason is selected appt can't be cancelled.	Docx & PDF
23/07/12	013	DLM 410 update – DNA tab changed to enable viewing of DNA'd appointments by patient.	Docx & PDF

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Vision Online Services Configuration

What's New

DLM 410 (Jul 12)

- **Did Not Attends (DNAs)** – A new setup option is available to determine whether patients can view their DNA details. See Did Not Attends (DNA's) on page 16.

DLM 380 (Nov 11)

Vision Online Services Configuration

- **Global Configuration**
  - **Registration Tab –** We have added new global invalidation options for unused registration letters and un-activated accounts. There are also options to enable reminders for registration to be sent by email. See "Registration" on page 8.
  - **NHS Mail Tab –-** Enables you to setup an NHS email account (**England and Scotland Only)** for SMS messaging, all users can create a global email signature which is attached to all emails sent to patients. See "NHS Mail" on page 9.

Online Appointments Configuration

- **New Tabs –** We have added the following three tabs to the VOS Appointments Configuration Screen:
  - **Bookings Tab –** Maximum outstanding appointments are now configured from this tab; you can also specify how far in the future appointments can be booked. There are also a number of options that can be used to manage how appointments are booked and what information is available to patients. See "Bookings Tab" on page 17.
  - **Cancellations Tab –** Cancellation reasons has moved from the General tab to Cancellations. You can now determine how long before an appointment a booking can be cancelled. The cancellation reasons can be configured for patient use; you can amend the displayed order and set a default. See "Cancellations Tab" on page 21.

- **Slot Types Tab –** Lists all slot types created in Vision Appointments, the text can be changed for patient use online, eg MS might be changed to Minor Surgery. See "Slot Types Tab" on page 29.

- **Tab Changes**
    - **General Tab –** There is a new DNA section which allows you to prevent patient access to VOS once they have reached a chosen number of DNAs for a set period in the past. See "General Tab" on page 15.
    - **Email Tab –** Has been removed; an email signature can be created which will be displayed in all VOS email messages. See "Email Signature on page 12.

New Modules

- **Online Repeats –** This module enables patients to request their repeat masters online, the request is then sent to the practice. From Mail Manager the message is processed and the prescription generated. The details are then updated onto the website so the patient knows their prescription is ready to collect. See "Online Repeats Configuration" on page 31

Other Changes

- **Clinicians Details –** A clinician's gender, role and special interests are now displayed online when selecting appointments to book. See "Add Gender, Role and Special Interests" on page 5.
- **Documentation Re-organised –**
    - **VOS Configuration User Guide -** This is for Practices to enable and setup VOS and configure services eg Online Appointments.
    - **VOS Registration –** This user guide explains how to register a patient for VOS and how a patient creates and activates a VOS user account.
    - **VOS Online Appointments –** This user guide explains how to configure Vision Appointments for use online. It also shows how Online Appointments is used by the patient to book or cancel appointments.

DLM 350 (Aug 11)

- Original VOS Online Appointment documentation re-organised into separate modular user guides:
    - **VOS Configuration User Guide** – This is for Practices to enable and setup VOS and configure services eg Online Appointments.
    - **VOS Registration (Practice)** – This user guide explains how to register a patient for VOS and manage the registration.
    - **VOS Registration (Patient) –** This user guide explains how a patient creates and activates a VOS user account.
    - **VOS Using Online Appointment (Practice) –** This user guide explains how to configure Vision Appointments for use online.

- **VOS Using Online Appointment (Patient) –** This user guide shows how Online Appointments is used to book or cancel appointments.

- The VOS Configuration screen had changed; there is now a series of tabs to access the different services, see "Configure Online Appointments" on page 14. The following new options are available:

  - **Appointments Message** – This is a practice specific message which is displayed on each Online Appointment webpage. See "Appointments Message" on page 15.

  - **Cancellation Reasons** – The cancellation reasons added in Vision Appointments are shown here. You can change how the message is presented to the patient by adding a VOS text message. See "Cancellation Reasons" on page 22.

  - **Clinics Tab** – Clinics setup in Vision Appointments can now be used for Online Appointments. See "Clinics" on page 25.

  - **Email Tab** – This facility enables you to add a Practice defined message to the booked appointment and cancelled appointment confirmation emails. **Note – this option was removed in DLM 380**.

Introduction

Vision Online Services (VOS) is a web-based application which has been developed to expand the services available to patients from their GP Practice. VOS allows the patient to request services from their Practice online at a time convenient to them.

Current Vision Online Services are:

- **Online Appointments** - This enables patients to view, book, or cancel appointments with their doctor/nurse online.

- **Online Repeats** – This facility enables patients to request their repeat prescriptions online, the message is then sent to the practice to action, the patient then collects the prescription as per the practice protocol.

This user guide details the use, setup and customisation of VOS and the modules currently available.

Practice Setup

VOS - Online Appointments became available in DLM 310, Online Repeats is available from DLM 380. To purchase one or more of the VOS services please contact INPS Sales or your Account Manager. We will then arrange remote installation and configuration at your practice.

Following INPS setup you will then need to configure the available VOS services using the tools available in Vision – Control Panel. See Enabling Vision Online Services on page 6, Online Appointments Configuration on page 13 and Online Repeats Configuration on page 31 for further details.

> **NOTE –** The VOS website is **not** available 24 hours per day. It may be unavailable, for example when backup is running at the Practice, or when the website is being updated.

Add Gender, Role and Special Interests

Online Appointments now displays the gender, role and special interests to patients when they are selecting appointments. This is information is recorded in the **Staff** files in **File Maintenance.** Check the clinician's gender details recorded on the Personal file.

Control Panel – Staff – Personal Details

On the Professional tab you record the Role (Mandatory), you also have the option to record the Main and Interest Speciality, select the clinician's speciality from the drop-down lists. These details, if recorded, are then displayed to patients when they are booking an appointment online.

Control Panel – Staff - Professional

Enabling Vision Online Services

> **NOTE:** Staff must have System Manager (Full) access in Vision - Control Panel to enable and configure VOS. (England Only – see RBAC User Guide for further details).

To Activate VOS:

1. Go to **Vision - Management Tools - Control Panel** – **File Maintenance**.
2. Click the **Online** icon, or select **Actions – Online Services Config.**
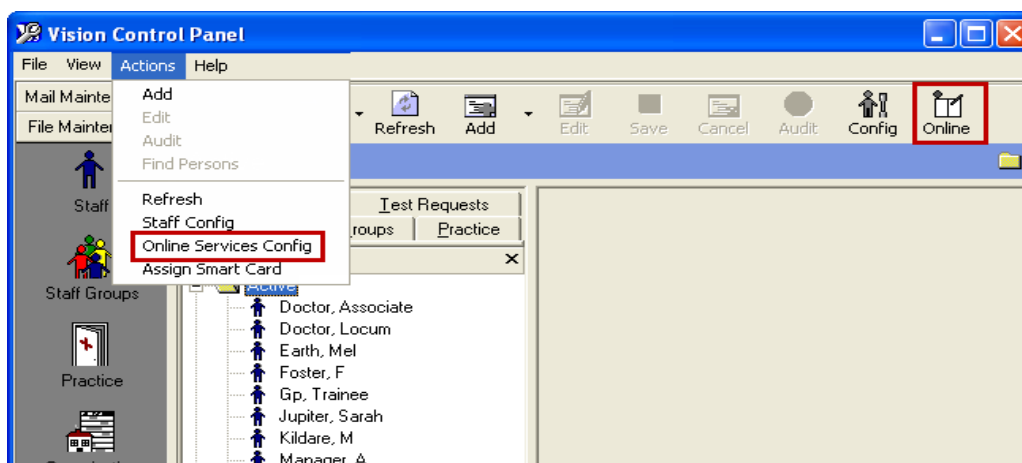
Control Panel

3. This will open the Vision Online Services screen. Click the **Enable Vision Online Services** box to enable VOS.
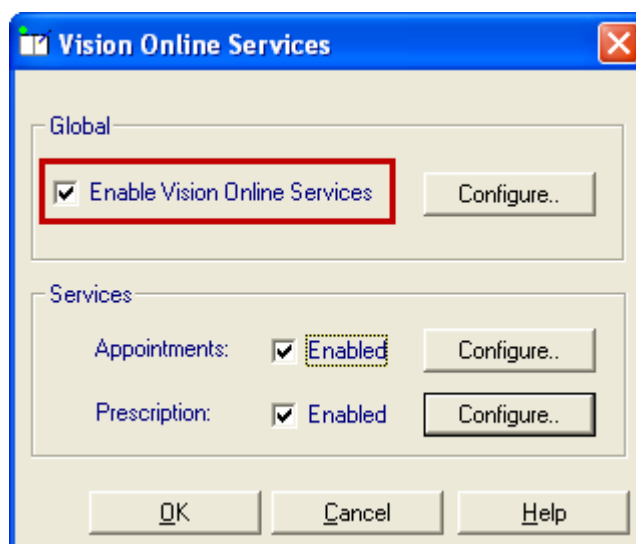
Vision Online Services Configuration

> **NOTE –** Only those modules you have purchased are available online.

You now need to configure the global settings, see VOS Global Configuration on page 7

VOS Global Configuration

The following three global tabs require configuring:

- **Welcome Message –** Create a message displayed on the VOS home page following successful login by the patient.

- **Registration –** Set global invalidation options for unused registration letters and un-activated accounts.

- **NHS Mail –** For English and Scottish practices with NHS Mail, there is a new facility to add an NHS mail account, which is then used to send confirmation and reminder emails and SMS messages to patients; a global email signature can also be created.

Welcome Message

A practice welcome message is displayed on the home page of the Vision Online Services web page following successful login by the patient. This is defined by the Practice.

Adding a Welcome Message

1. From **Control Panel – File Maintenance,** select **Actions – Online Services Config.** In the Global section click the **Configure** [Configure..] button.

2. Select the **Welcome** tab, type your message in the welcome message window (max 2000 characters). This is displayed on the Home Page of the website following a successful login by your patients.
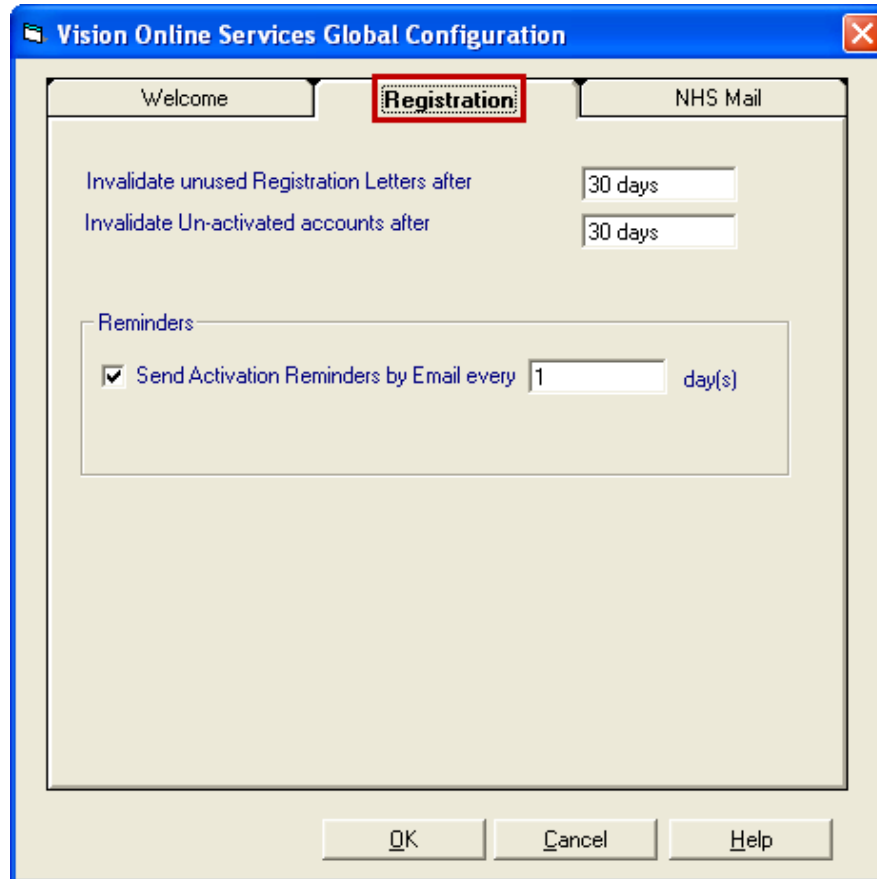
Welcome Message

3. Press the **Preview** button to check the message. You can customise your welcome message using HTML formatting tags; see "Formatting HTML Messages" on page 34.

Registration

From the registration tab you can set a time period for when unused registration letters and un-activated accounts are automatically invalidated. There is also an option to enable reminders for registration to be sent by email.

VOS Global Configuration – Registration

Invalidate unused registration letters after

This enables you to set a expiry date for Registration letters, the expiration date will be printed on the patients' registration letter. The patient has until the expiry date to register for Online Services. Once the date has passed the registration letter cannot be used, the patient will need to collect a new registration letter and re-register for Online Services

Invalidate Un-activated accounts after

This enables you to set an expiry date for patients to activate their Online Account. On registering patients are sent a Confirmation Code which activates their account. If they fail to activate the account by the expiry date, they will need to re-register for Online Services. If their registration letter has also expired they will require a new registration letter.

> **REMINDER -** To change the date, type the number required followed by **D** (days), **W** (weeks), **M** (months), or **Y** (years), eg to change date to two months type 2m.

Reminders

Send Activation Reminders by Email – Tick this to send reminders to patients by email, to remind them to activate their Online Account.

If an NHS Mail Account is setup the following option is available:

Send Activation Reminders by SMS – Tick this to send a reminder to patients by SMS (Text) message, to remind them to activate their Online Account. This function requires the use of an NHS Mail account, which are currently available to practices in England and Scotland only.
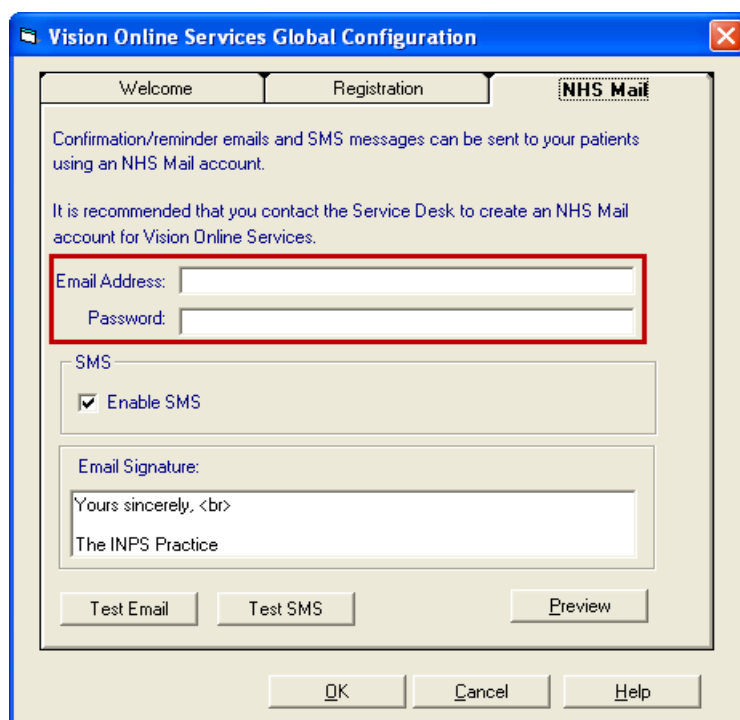
> **NOTE -** By default these services are ticked to enable the service. If you do not want to send email and/or SMS messages remove the tick from the appropriate box.

If ticked to use the service, the NHS Mail settings need to be configured. See NHS Mail on page 9.

NHS Mail

Confirmation and reminder emails and SMS (Text) messages can be sent to your patients via NHS Mail, to remind them to setup their user account and to remind them of appointments they have booked for example.

> **IMPORTANT – SMS Messaging** is available for practices in **England** and **Scotland with an NHS Mail Account** only. For practices without NHS Mail, confirmation emails will continue to be sent to patients via the VOS Gateway.

VOS Global Configuration - NHS Mail

Email Setup – England and Scotland Only

An NHS Mail account is required to send emails and SMS messages, contact your Service Desk at the PCT/HB to request a new account for Vision Online Services. Once you have the new NHS Mail Account, type the email address in the **Email Address** box for example visiononlineservices@G12345.nhs.uk, then type the **Password.**
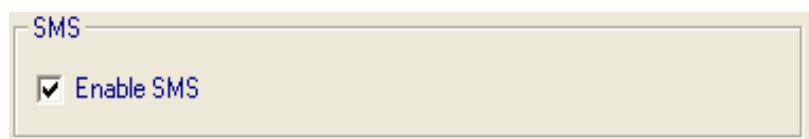
VOS Global Configuration – NHS Mail – Email Address

NOTE – NHS Mail account passwords expire every 60 days, an email is sent to the Mail account prior to expiration. You **MUST** reset the password, before it expires. If the password is not reset the Mail account will be **Locked,** this will prevent email and SMS messages being sent to patients.

REMINDER – When you have changed the NHS Mail password go to **Control Panel – File Maintenance – Actions – Online Services Config – Global – NHS Mail** and change the password.

Enable SMS – England and Scotland Only

Once you have setup your NHS Mail account, the SMS messaging is enabled by default. To disable SMS messaging remove the tick from the **Enable SMS** box.

VOS Global Configuration – NHS Mail – Enable SMS

Test Email and SMS Messaging – England and Scotland Only

Once setup you can test the details to make sure they are working.

> **NOTE –** Retest the settings when the Email details change, for example when the password is reset.
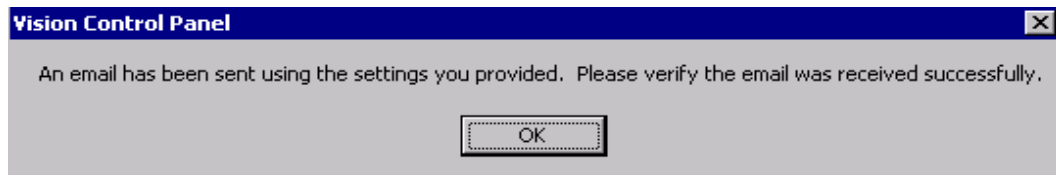
To Test Email Settings

1. From **Control Panel – Online Services Config – Global Configure**, select the **NHS Mail** tab.

2. Click the **Test Email** [Test Email] button, the **Send Test Email** box opens.

Send Test Email
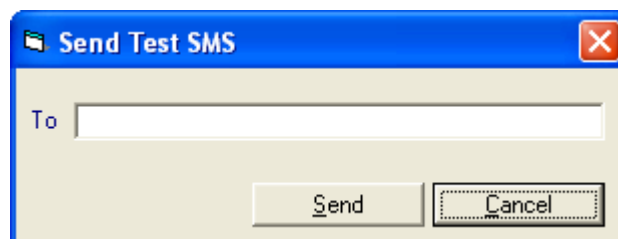
3. Enter your email address (or the email address for the person you want to receive the test message), then click **Send**.

4. You are prompted: *An email has been sent using the setting you provided. Please verify the email was received successfully.* Click **OK** to close.

5. Check your email inbox for a test email, confirming that the NHS Mail account is configured correctly.

To Test SMS Settings

1. From **Control Panel – Online Services Config – Global Configure**, select the **NHS Mail** tab.

2. Click the **Test SMS** [Test SMS] button, the **Send Test SMS** box opens.

Send Test SMS

3. Enter the **phone number** you wish to receive the test message to, then click **Send**.

4. You are prompted: *SMS message has been sent using the setting you provided. Please verify the SMS was received successfully.* Click **OK** to close.
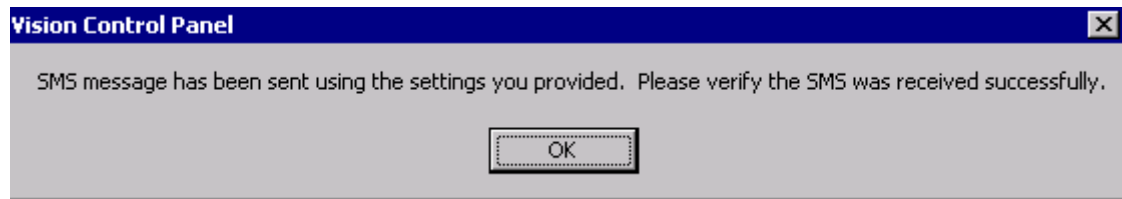
5. Check your phone for a test SMS message, confirming that the NHS Mail account is configured correctly.

Email Signature – All Countries

You can add an email signature to all emails send to patients for Vision Online Services. To create a signature type the details in the **Email Signature** box, click **Preview** to check.

Email Signature

You have now Activated VOS and now need to configure the individual modules.

- To activate and configure Online Appointments, see Enabling Online Appointments on page 13.

- To Activate and configure Online Repeats, see Enabling Online Repeats on page 31.
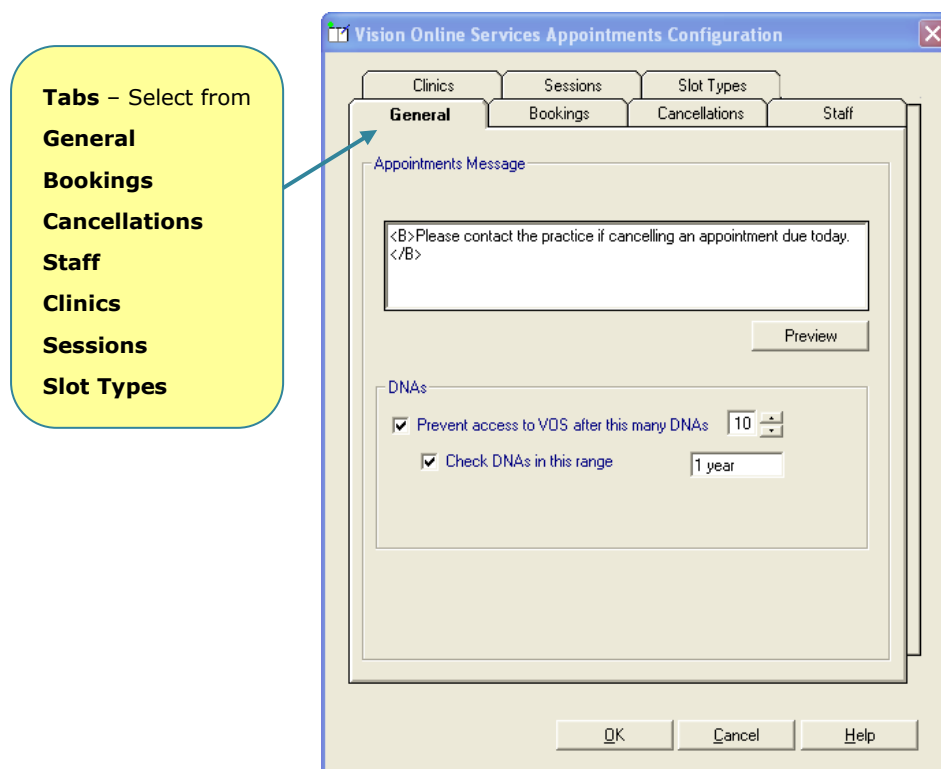
Online Appointments Configuration

Enabling Online Appointments

> **NOTE:** Staff must have System Manager (Full) access in Control Panel and Full access to Vision Appointments, to enable and configure Vision Online Appointments. (England Only – You need the relevant RBAC rights on your Smartcard to access VOS Configuration. See RBAC User Guide for further details).

To Activate Online Appointments:

1. Go to **Vision - Management Tools - Control Panel** – **File Maintenance**.

2. Click the **Online** icon, or select **Actions – Online Services Config.**
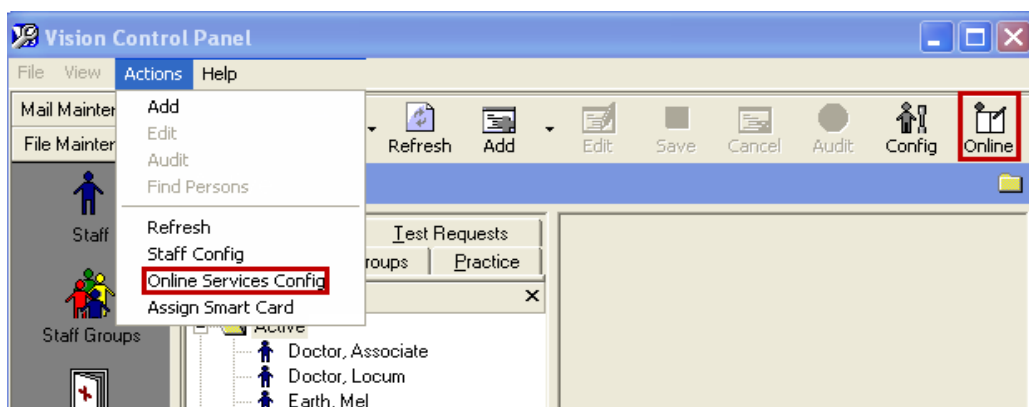
Control Panel

3. This will open the Vision Online Services Configuration screen. VOS should be enabled and a welcome message added (if required), see "Enabling Vision Online Services" on page 6.

4. Tick the Appointments **Enable** box in the Services section. This gives you access to tools to customise Online Appointments on the website.
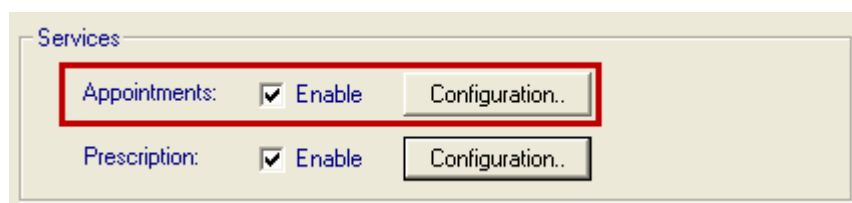
Enable Services - Configuration

5. Click the **Configuration** button to customise how appointments will work for your practice. There are seven tabs which require attention. See "Configure Online Appointments" on page 14.

Configure Online Appointments

> **NOTE:** Staff must have System Manager (Full) access in Control Panel and Full access to Vision Appointments, to enable and configure Vision Online Appointments. (England Only – You need the relevant RBAC rights on your Smartcard to access VOS Configuration. See RBAC User Guide for further details).

You now need to determine which staff and sessions are available on the VOS website and setup how you want Online Appointments to work for your patients. There are seven tabs that need your consideration, they are:

- **General Tab** – See "General Tab" on page 15.
- **Bookings –** See "Bookings Tab" on page 17 .
- **Cancellations -** See "Cancellations Tab" on page 21.
- **Staff Tab** - See "Staff Tab" on page 24.
- **Clinics Tab** – See "Clinics" on page 25.
- **Sessions Tab** – See "Sessions Tab" on page 27.
- **Slot Type -** See "Slot Types Tab" on page 29.

You will need to revisit Appointments Configuration when a new clinician joins your practice. You can also make changes to the Sessions available. However, you need to modify books in Vision Appointments for any changes to be shown.

Tabs – Select from

General

Bookings

Cancellations

Staff

Clinics

Sessions

Slot Types
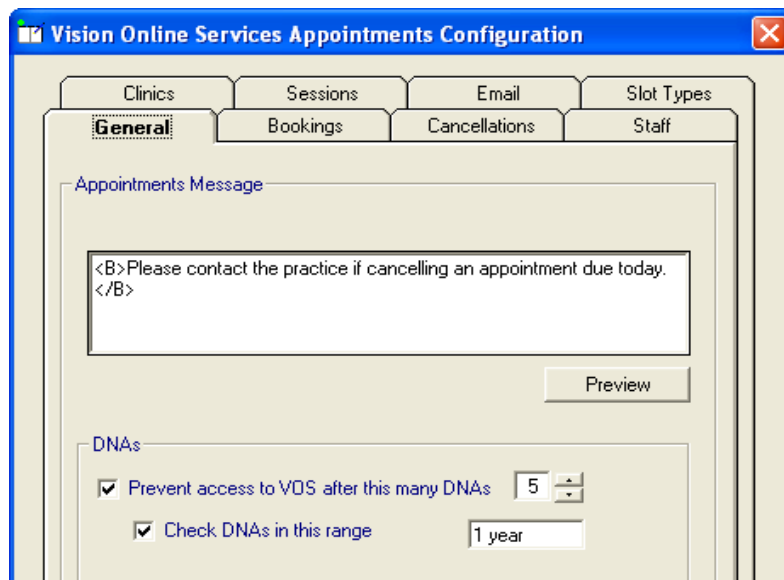
Vision Online Services - Appointments Configuration

General Tab

The General Tab enables you to setup the following two tools for Online Appointments:

- **Appointments Message**
- **Did Not Attend (DNA)**

VOS Appointments Config – General Tab

Appointments Message

This is a practice specific message which is displayed on each Online Appointments web page.

Add Appointments Message

1. From **VOS Appointments Configuration** select the **General** tab.
2. Type your Appointments message in the **Appointments Message** window (max 500 characters). You can use HTML formatting tags to customise your text, see "Formatting HTML Messages" on page 34.

Appointments Message

3. Click **Preview** to check your messages.
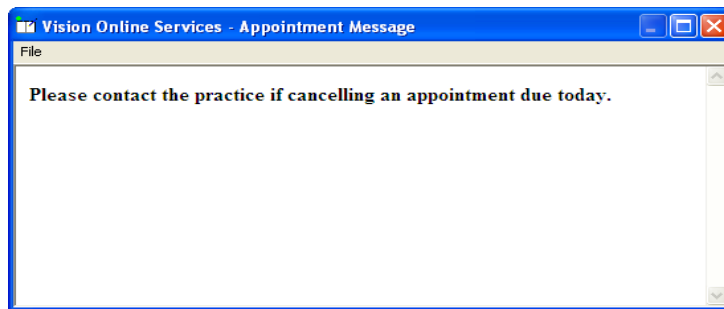
Appointment Message – Preview

4. Click the red cross in the top right corner to close the preview.

Did Not Attends (DNA's)

Use the DNA tool to determine whether patients can view their DNA'd appointments and how many DNA's are permitted before the user account is disabled.
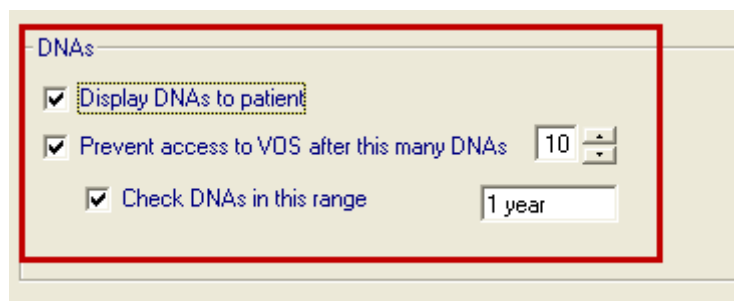
DNA's

1. From **VOS Appointments Configuration** select the **General** tab, **DNA's.**

2. **Display DNAs to patient** is deselected by default, so patients are unable to view their DNA'd appointments online. Tick the box to enable viewing of DNAs.

3. **Prevent access to VOS after this many DNAs**, when ticked this option is enabled (default), if you do not want to limit patients' access to VOS remove the tick to disable this facility.

4. When ticked, use the up/down arrows to select a number between 1 and 99, this being the total number of DNA's permitted before the user account is disabled.

5. A date range can be specified if required (optional), this limits the number of DNA's required to the time period, eg If the patient has more than 5 dna's in one year their user account will be disabled. To add the date, type the number required followed by **D** (days), **W** (weeks), **M** (months), or **Y** (years), eg to change date to six months type **6m**.

NOTE – Practices who use the Appointments slots to send internal messages regarding the patient, should be aware that such slots will count as DNA'd appointments if they have not been marked with an arrive, start or seen consultation time.

Bookings Tab

This tab enables you to manage new and existing appointment bookings.

VOS Appointments Configuration – Bookings

Maximum Appointments Allowed

You need to set how many outstanding appointments the patient is allowed to have booked at any one time. By default this is set to 0 appointments. However, you may change this to any number between 1 and 99.

> **NOTE:** If you set the number of appointments to 0, the patient can book as many appointments as they wish.

Maximum Outstanding Appointments

When you set a limit on the number of appointments outstanding, once this number is then reached, the patient will receive a message which states: "*You have reached the maximum number of bookings allowed. No further bookings can be made at this time.*"

> **NOTE –** This includes appointments booked at the Practice or Online.

To book a further appointment they would need to either:

- Contact the Practice and arrange an appointment with the practice.
- Or cancel one of the booked appointments the patient already has which will then allow the patient to book a further appointment.

Maximum Appointments Reached

How Far in the Future can Appointments be Booked

Define a date period here to set how far in advance patients using Online Appointments can book. To add a date, type the number required followed by **D** (days), **W** (weeks), **M** (months), or **Y** (years), eg to change date to two months type **2m**.

Future Appointments

Allow Weekend Bookings

Use this tool to determine if weekend slots are available or not.

Allow Weekend Bookings

When ticked, all weekend slots reserved for web are available to patients, when unticked all the slots are unavailable.

Display Appointment Duration

When booking an online appointment the start time is displayed, when **Display Appointment Duration** is ticked this option displays the appointment end time as well, therefore, displaying the duration to the patient.

Appointment duration

Online Appointment Details – Appointment Duration

Online Appointment Details – No Appointment Duration

Booking Confirmation and Reminders

Tick the boxes to allow email and/or SMS messages to be sent to patients when booking appointments either Online or at the practice.

If you want the patient to have a reminder prior to their booked appointment tick the **Send Email Reminders** and/or **Send SMS Reminders,** add a date when the reminder is to be sent, type the number required followed by **D** (days), **W** (weeks), **M** (months), or **Y** (years), eg to send a reminder two days before their appointment type **2d**.

> **NOTE –** SMS messaging is only available to practices with NHS Mail accounts (Currently practices in England and Scotland).

Booking Confirmation & Reminders

Booking Reason

The Booking Reason is the freetext comment added by staff when making an appointment to advise the clinicians why the patient is attending. This option enables you to make that reason available to VOS users when viewing existing appointments, booked at the practice. Tick the **Display Reason for booking for existing appointments** box to allow access to the booking reason. Tick the **Allow Reason to be edited** box if you want patients to be able to edit the reason (optional), remove the tick to prevent patients editing the reason.

Booking Reason

Online Appointment Details – Editable Booking Reason

Cancellations Tab

The Cancellation Tab is used to set a time period for cancelling appointments, determining if email and SMS confirmation messages are sent and adding Cancellation Reasons.

> **NOTE –** SMS messaging is only available to practices with NHS Mail accounts (Currently practices in England and Scotland).

VOS Configuration – Cancellations Tab

Cancellation Settings

You can set a cut-off time period, after which the patient cannot cancel booked appointments online. To set a time period click in the **hours** box and add a number between 0 and 999, eg 24 hours (one day), click in the **mins** box (if required) and add a number between 0 and 59.

Cancellation Settings

It you want the patient to be sent an Email and/or SMS message tick the appropriate boxes. The patient will receive and email and/or SMS if the appointment is cancelled either at the practice or online.

If a patient attempts to cancel an appointment during the cancellation cut-off period they are advised: "*This appointment cannot be cancelled online. Please contact your GP Practice".*

Appointment Details – Cannot Cancel

Cancellation Reasons

When cancelling appointments online, patients are presented with a list of cancellation reasons to select from. This facility enables you to change the text used by practice staff to something more appropriate for patients. You can also set a default cancellation reason and change the order in which they are presented to the patient.

All cancellation reasons added in Vision Appointments are shown here. To add new cancellation reasons go to Vision Appointments. See Vision On-screen Help for further details or refer to the "VOS Online Appointments User Guide".

Add Alternative text

1. From VOS **Appointments Configuration** select the **Cancellations** tab.

General Tab - Cancellation Reasons

2. Double click the cancellation reason; this opens the "VOS change VOS Text" window.
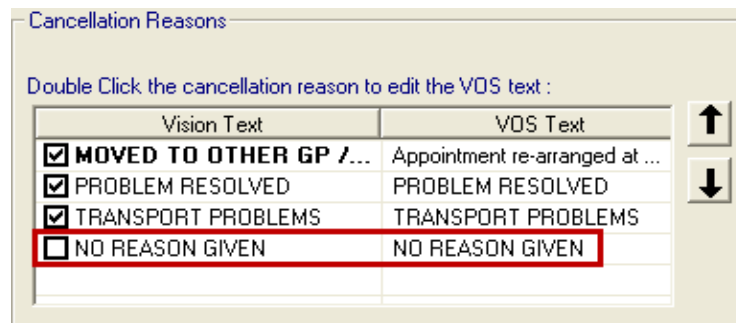

VOS change VOS Text

3. Type the alternative text in the VOS text window.

4. Removing the tick from the tick box hides that cancellation reason from the patients online.

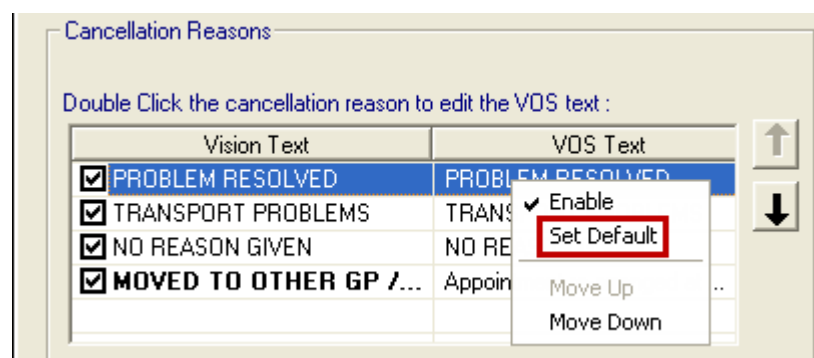

Cancellation Reasons – Reason Deselected

IMPORTANT – If all cancellation reasons are deselected (hidden) patients will be unable to cancel appointments, an error message is displayed to the patient advising them to contact the practice.

6. The order of the displayed Cancellation Reasons can be changed using the up ⬆ and down ⬇ arrows. First highlight the reason you wish to move, then use the arrows to move it to the required position in the list.
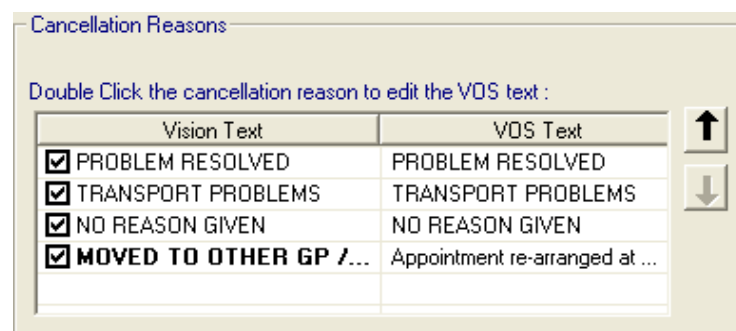
Cancellation Reasons – Positions changed

6. To set one of the cancellation reasons as the default, highlight the required reason and right click, select **Set Default.** The default text is emboldened.

Cancellation Reasons – Set Default

NOTE – The default can be changed; right click and select **Remove Default.**
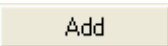
Staff Tab

Staff Setup

In order for patients to be able to book appointments, you first need to determine which members of staff are available within Vision Online Appointments.
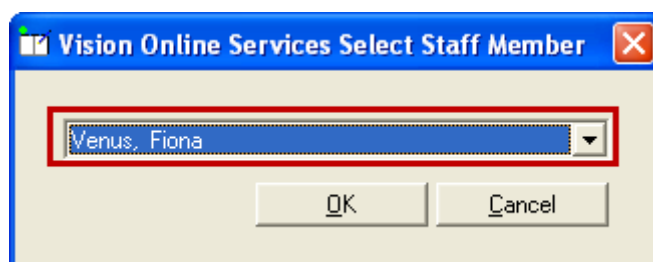
1. On **Vision Online Services Appointments Configuration** screen, select the **Staff** tab.

2. Use the radio buttons to determine which staff your patients will be able to book appointments with on the Vision Online Appointments website.

3. You can use the radio buttons to select:

   - **All Staff** – All active clinical staff listed in File Maintenance.

   - **Usual GP** – Includes only those GPs recorded as Usual GP in patient registration.

   - **Salaried GP** – Includes those GPs set as Salaried GPs in File Maintenance.

Staff Tab – Radio Buttons

IMPORTANT – Use the radio buttons **OR** setup staff individually. Do **not** use both setup options.

4. Alternatively, you can setup members of staff individually, remove the tick from the **All Staff** box, then click the **Add** [Add] button. This will display a drop-down menu listing all clinical staff from the File Maintenance list.

5. Select the required clinician's name from the drop down list and click **OK** to close.

Add Staff Member

6. Click on the **Add** Button to repeat this process, continue until you have manually added all the required staff.

7. Click the **Cancel** button to finish adding staff.

Clinics

Clinics are created in Vision Appointments and enable you to setup sessions and book appointments, without the appointment book being linked to a staff member, for example flu clinics. You can determine which clinics are available on the VOS website.

> **NOTE** – To create and setup Clinics refer to Vision Appointments On-screen help.
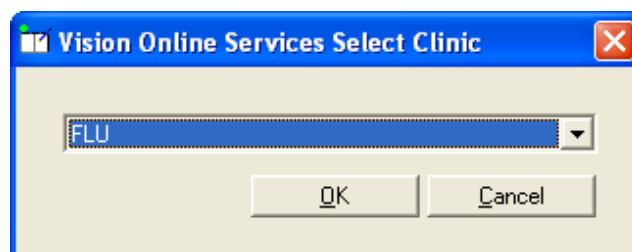
Add Clinics

1. On **Vision Online Services Appointments Configuration** screen, select the **Clinics** tab.
2. By default the **All Clinics** box is ticked, so all clinics will be available to the website.
3. To change this to specific clinics only, click to remove the tick.

Clinics - Add

4. Click the **Add** [Add] button, the VOS Select Clinic window will open.

VOS Select Clinic

5. Select the required clinic from the drop-down list, click **OK.**
6. Repeat steps 4 and 5 until you have added all the clinics you require.
7. If you have selected all the clinics in the list you will be prompted: *"All available clinics have been added to the list."* Click **OK** to continue.
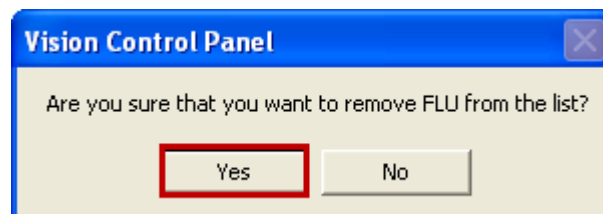
Remove Clinic

1. To remove a clinic from the list, click to highlight the required clinic, then click the **Remove** button.
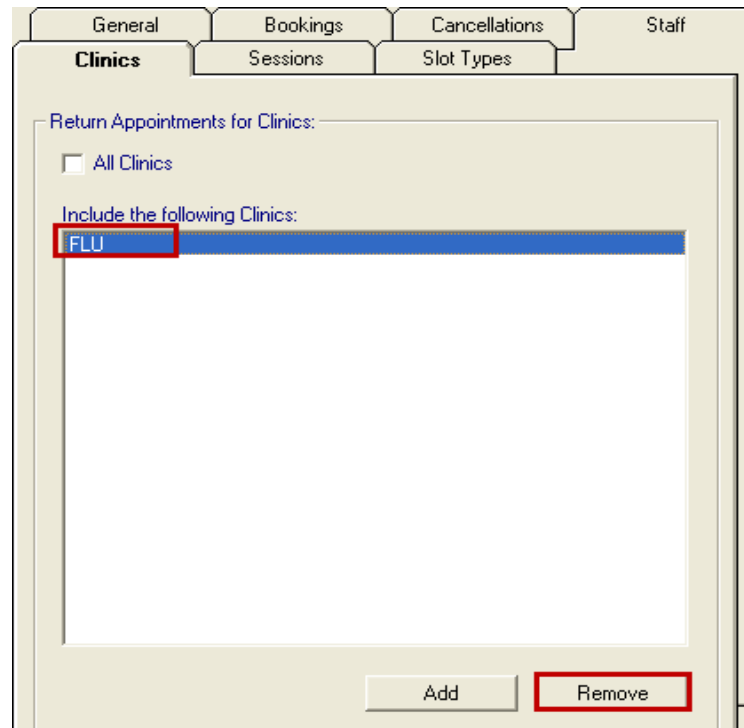
Clinics – Remove Clinic

2. You are prompted: *"Are you sure that you want to remove (name of clinic) from the list?* Click **Yes** to remove.


Remove Clinic Confirmation

Sessions Tab

This is used to configure the following:

- **Set Session Locations**
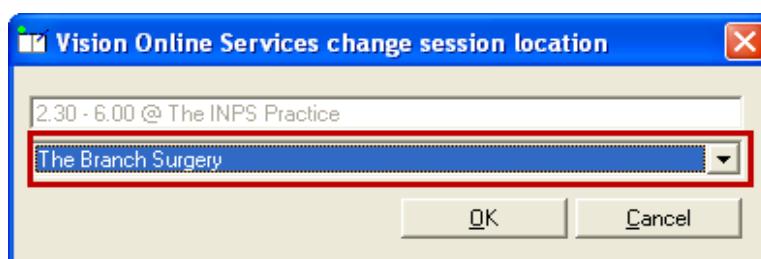- **Sites Configuration**

Setting Session Locations

Use this facility to link a session to a location.

1. On **Vision Online Services Appointments Configuration** screen, select the **Sessions** tab.
2. The **Set Session Locations** window lists all sessions added/created in Vision Appointments.
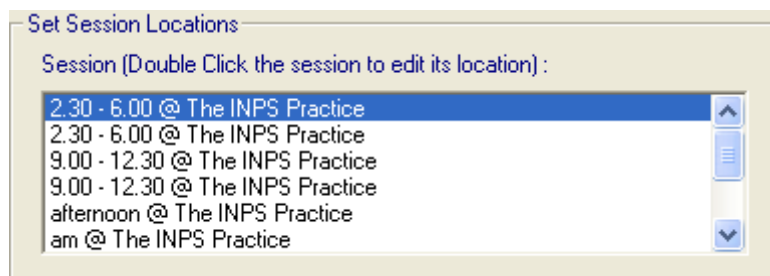
Sessions Tab - Set Session Locations

3. Double click on a session to edit its **Location.**

VOS Change Session Location

4. Select the location from the drop-down menu then click **OK.** Continue this process until you have set a location to each session, as required.

Setting Site Access

Site configuration is used to specify which Appointment session should be included on the Vision Online Services website for each location. This enables a practice to limit which sessions are included in Online Appointments.

1. Select Site from the **Notes Held at Site** drop down list, ie. Main Practice.
2. To add all sessions at that site, click the tick box – **All Sessions**.
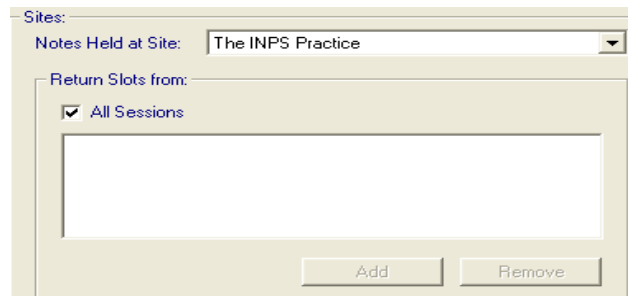
Sessions Tab - Set Sites

3. Alternatively, add the sessions manually.

4. Click on the **Add** button and select a session from the drop down list. Click **OK** to add the next session(s) in the list, or **Cancel** to finish.
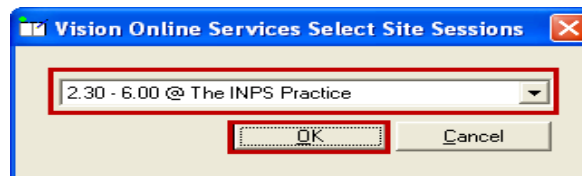

Select Sessions

5. Continue this process until you have added all the required sessions.

6. If you have branch surgery(s) change the Notes Held at Site to the alternative location and add sessions for that location.

7. Continue this process until you have setup all branch sites.

> **NOTE:** If you add individual sessions, only those sessions added will be available and all other sessions will be disabled.

Remove Session

1. To remove a Session from the list, select the required location from the Notes Held at Site drop-down list, click to highlight the required session then click the **Remove** [Remove] button.
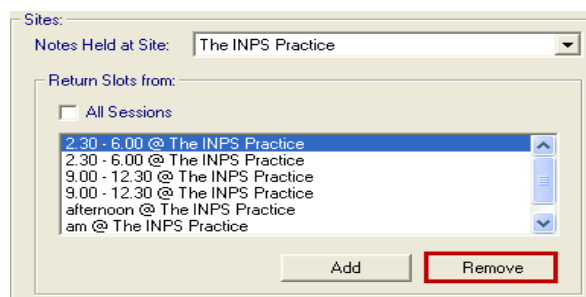
Sessions - Remove

2. You are prompted: *"Are you sure that you want to remove (name of session) from the list?"* Click **Yes** to remove.
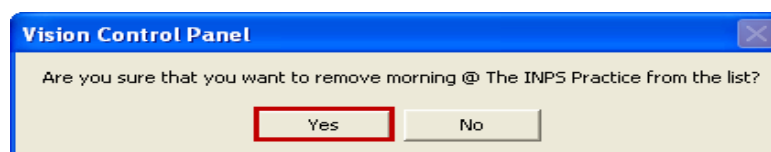
Remove Session Confirmation

Slot Types Tab

When booking appointments online, the slot type is included in the patients' appointment display details. This facility enables you to change the text used by practice staff to something more appropriate for patients.

Appointment Book – Slot Type

All slot types added in Vision Appointments are displayed; the text in the VOS Text column can be amended, to make it more patient friendly, for example MS is changed to Minor Surgery. To add new slot types go to Vision Appointments. See Vision On-screen Help for further details or refer to the "VOS Online Appointments User Guide".

Add Alternative text

1. From VOS **Appointments Configuration** select the **Slot Types** tab.

Slot Types

2. Double click the slot type to change; this opens the "VOS change VOS Text" window.
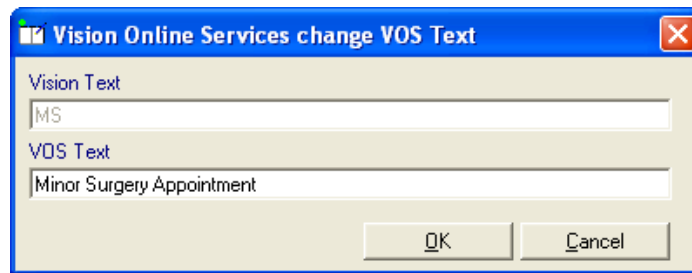
VOS change VOS Text

3. Type the text you want displayed to the patient online in the VOS text window.

4. Now setup has finished, click **OK** to save and return to the VOS Configuration screen.

5. Click **OK** to close.

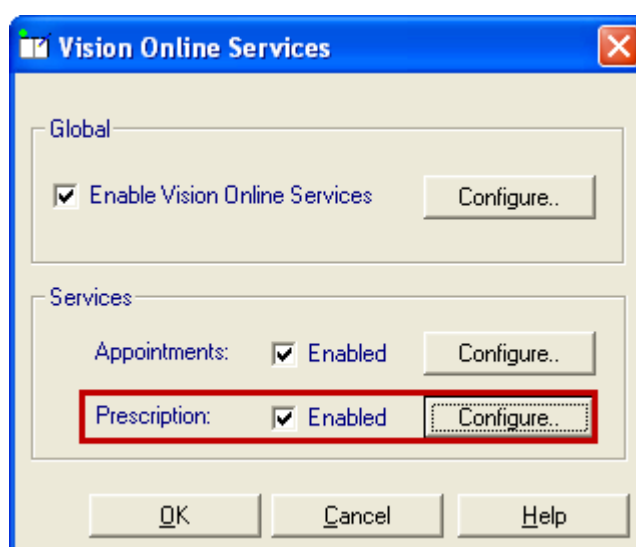# Online Repeats Configuration

Enabling Online Repeats

> **NOTE:** Staff must have System Manager (Full) access in Control Panel to enable and configure Vision Online Repeats. (England Only – see RBAC User Guide for further details).

Practices who have previously setup and used Online Appointments can quickly configure VOS for Online Repeats; see "Configure Online Repeats" below.

In you are new to Vision Online Services you first need to enable VOS and add a Welcome message, see "Enabling Vision Online Services" on page 6.

To enable Online Repeats:

1. To activate **Online Repeats**, tick the Prescription **Enable** box in the **Services** section. This gives you access to tools to customise Online Repeats on the website.
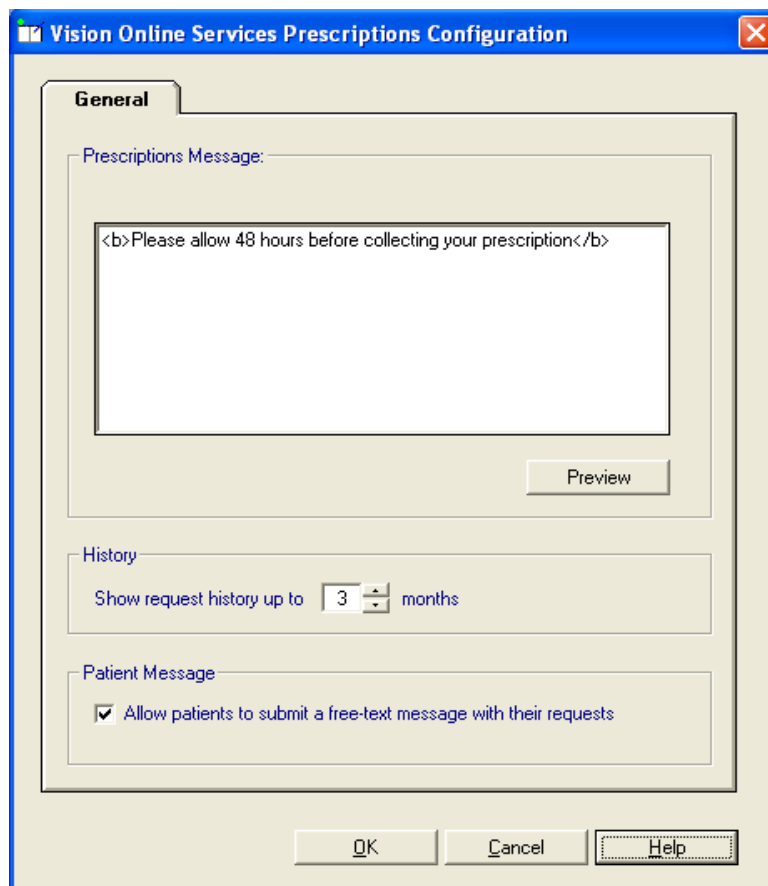

Enable Services – Online Repeats

2. Click the **Configuration** button to customise how the service will work for your practice. There are three tasks which require attention. See "Configure Online Repeats" on page 32

Configure Online Repeats

There are three tasks to complete which enable you to configure how patients use Online Repeats at your Practice. The tasks are:

- **Prescription Message –** This enables you to add a message to be displayed on each Online Repeat webpage. See "Prescription Message" on page 33

- **History –** You can set a time period, which will determine how many historic repeat entries are displayed to the patient. See "History" on page 33

- **Patient Message –** This sets whether a patient can send a free text message to the practice or not. See "Patient Message" on page 33.
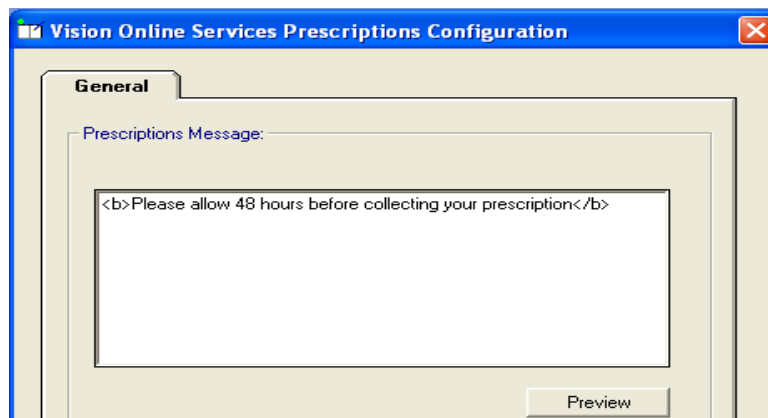
VOS Prescriptions Configuration

Prescription Message

1. In the Prescription Message window, type your message. This is displayed on all Online Repeat web pages.

VOS Prescription Config – Prescription Message

2. Press the **Preview** [Preview] button to check the message. You can customise your prescription message using HTML formatting tags; see "Formatting HTML Messages" on page 34.

History

Use the arrows to select a number between 1 - 12 month(s), this determines the period of time displayed to the patient when viewing their repeat request history.
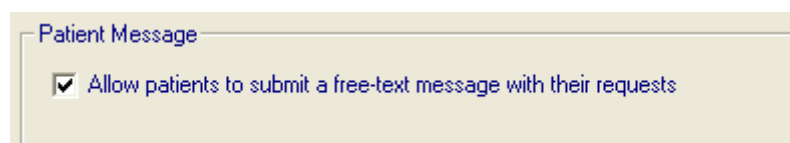

VOS Prescription Config - History

Patient Message

Tick the box to allow patients to submit a free-text message with their Online Repeat requests.

VOS Prescription Config – Patient Message

Appendix

Formatting HTML Messages

The welcome message can be formatted using HTML formatting tags; HTML tags are:

- Used either side of a keyword eg <html> you wish to format.
- The tag always has angle brackets eg <html> denoting the starting and closing of the tag.
- HTML tags normally come in pairs eg (the starting tag) and (the closing tag)
- You can use multiple tags, but each tag must have brackets at the start and end of the tag eg <p>

This is a list of the most common codes:

| Starting Tag	Closing Tag	Description
<h1>	</h1>	First Heading. Headings can be defined with <h1> to <h6> tags. <h1> is the largest heading and <h6> is the smallest.
<p>	</p>	Paragraph
		Bold text
<big>	</big>	Big text
<i>	</i>	*Italic text*
<small>	</small>	Small text
_		Subscript text
[	]	Superscript text
 		This tag adds a single line break, it does not need a closing tag.

For example:

Welcome to the <B>Welcome to the Visionary Healthcare Practice</B>

Will be displayed as:

Welcome to the Visionary Healthcare Practice
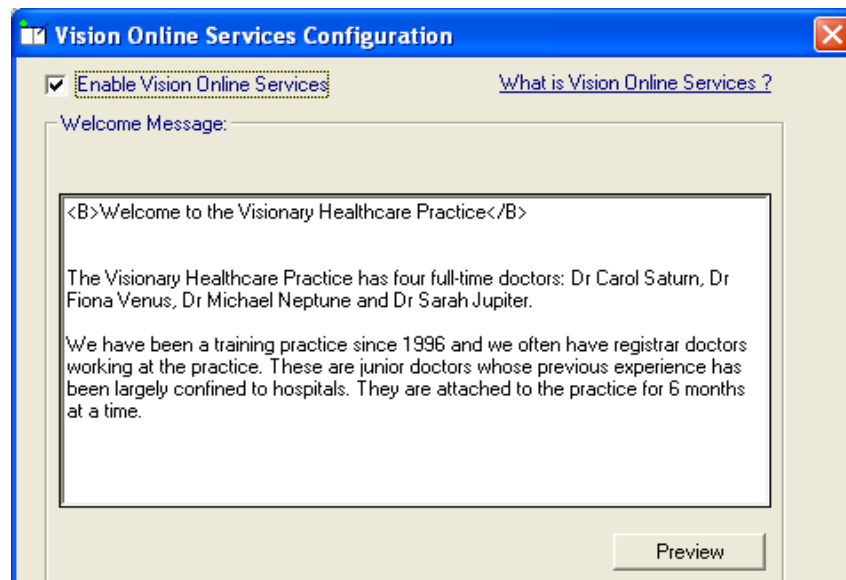
VOS Configuration – Welcome Text
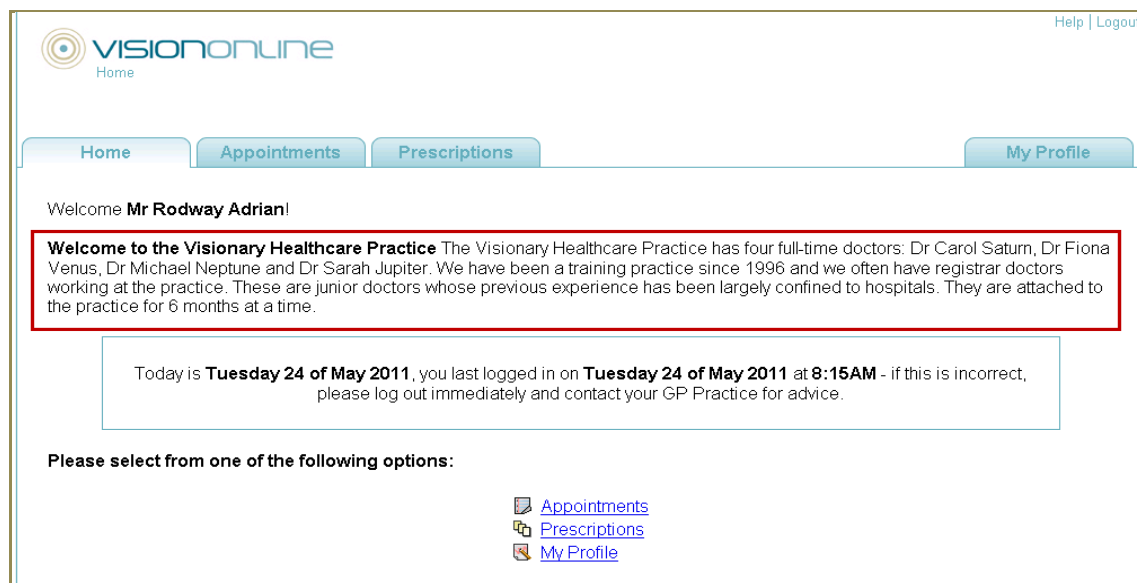
VOS Home Page – Welcome Message

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