

# My Health Online

Vision Online Services Configuration For:

Release 0 - Online Appointments

Release 0.5 – Online Repeats

Wales



Working in Partnership with NWIS



### Table of Editions and Contents

<b>Date</b>	<b>Version</b>	<b>Contents</b>	<b>Output</b>
22/12/10	001	Draft created	Docx & PDF
25/3/11	002	Following review by ESTU	Docx & PDF
23/9/11	003	Updated for Phase 0.5 Online Repeats	Docx & PDF
23/11/11	004	Updated Add Gender and Special Interests to include GP Role. All images updated.	Docx & PDF
05/12/11	005	Updated NHS Mail details, removed SMS details.	Docx & PDF
07/02/12	006	Updated VOS Global - Registration tab image to remove SMS details. Also removed all references to Tomcat, as per instruction from CSMI.	Docx & PDF
19/04/12	007	Practice Setup – Amended to remove INPS Sales details and replace with NWIS.	Docx & PDF

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# My Health Online - Vision Online Services (VOS) Configuration

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## What's New

### DLM 380

#### *Vision Online Services Configuration*

- **Global Configuration**
  - **Registration Tab** – We have added a 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 or SMS. See "[Registration](#)" on page 8.
  - **NHS Mail Tab** – 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 14.
  - **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 17.
  - **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 27.

- **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 12.
  - **Email Tab** – Has been removed; an email signature can be created which will be displayed in all VOS email messages. See "[Create An Email Signature](#)" on page 9.

### ***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 29.

### ***Other Changes***

- **Clinicians Gender, Role and Specialties** – 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 4.

### ***Documentation Changes***

- Original MHOL Online Appointment documentation re-organised into separate modular user guides:
  - **MHOL Configuration User Guide** – This is for Practices to enable and setup VOS and configure services eg Online Appointments.
  - **MHOL Registration** – This user guide explains how to register a patient for MHOL and a patient creates and activates a MHOL user account.
  - **MHOL Using Online Appointment** – 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.

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## Introduction

My Health Online (MHOL) has been developed to enable Welsh Practices to expand the services offered to patients.

This User Guide details the setup and configuration necessary for My Health Online and the available modules.

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.

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## Practice Setup

VOS - Online Appointments became available in DLM 310, Online Repeats is available from DLM 380. Please contact NHS Wales Informatics Service (NWIS) or your Account Manager for further details. We will then arrange remote installation and configuration at your practice.

Following INPS setup you will then need to configure Vision Online Services (VOS) using the tools available in Control Panel. See [Enabling Vision Online Services](#) on page 6, [Online Appointments Configuration](#) on page 10 and [Online Repeats Configuration](#) on page 29 for further details.

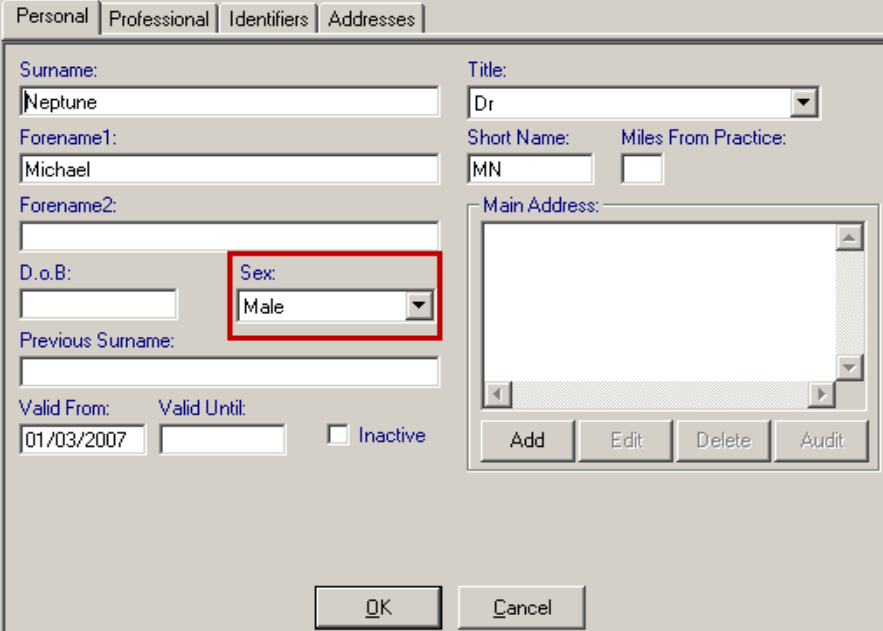
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**NOTE** – The VOS website is **not** available 24 hours per day. It may be unavailable, for example when backup is running at the Practice, or when the website is being updated.

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## Add Gender, Role and Special Interests

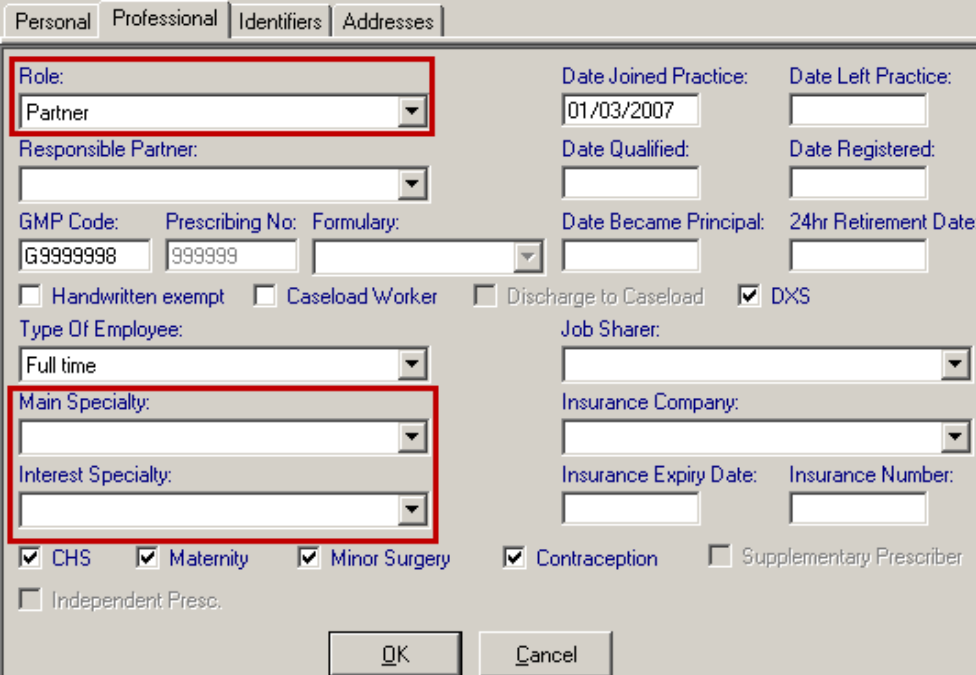
Online Appointments now displays the gender, role and special interests to patients when they are selecting appointments. This information is recorded in the **Staff** files in **File Maintenance**. Check the clinician's gender details recorded on the Personal file.



The screenshot shows the 'Personal' tab of the Staff Control Panel. The 'Sex' dropdown menu is highlighted with a red box and set to 'Male'. Other fields include Surname (Neptune), Forename1 (Michael), Title (Dr), and Valid From (01/03/2007). The 'Inactive' checkbox is unchecked.

*Control Panel – Staff – Personal Details*

On the Professional tab you can record the Role and Main and Interest Speciality, select the clinicians speciality from the drop-down lists. These details are then displayed to patients when they are booking an appointment online.



The screenshot shows the 'Professional' tab of the Staff Control Panel. The 'Role' dropdown menu is set to 'Partner' and the 'Main Specialty' dropdown menu is highlighted with a red box. Other fields include Date Joined Practice (01/03/2007), GMP Code (G9999998), Prescribing No (999999), and various checkboxes for CHS, Maternity, Minor Surgery, Contraception, and Supplementary Prescriber.

*Control Panel – Staff - Professional*

## What do I need to do?

In order to use My Health Online with the following configuration is required:

- Enable Vision Online Services in Vision Control Panel. See ["Enabling Vision Online Services"](#) on page 6.
- Configure the Global services:
  - Create a welcome message in English and in Welsh. This is displayed on the My Health Online home page once the patient has logged in. See ["Welcome Message"](#) on page 6.
  - Setup the invalidation options for unused registration letters and un-activated accounts and enable reminders for registration to be sent by email or SMS. See ["Registration"](#) on page 8.
  - Create an email signature. See ["NHS Mail"](#) on page 9
- Configure Online Appointments, enable Online Appointments see [Enabling Online Appointments](#) on page 10, then configure the following appointment settings:
  - Add an optional message which displays on all MHOL Appointments web pages. See ["Appointments Message"](#) on page 12.
  - Set your DNA preferences, to prevent online access once the chosen limit is reached. See ["Did Not Attends \(DNA's\)"](#) on page 13
  - Set your Booking preferences for maximum appointments allowed per patient, how far in the future bookings can be made etc. See ["Bookings Tab"](#) on page 14.
  - Add/review appointment cancellation reasons. You will also need to add a Welsh version of these reasons. See ["Cancellations Tab"](#) on page 17.
  - Choose which clinical staff's appointments are going to be available online. See ["Staff Tab"](#) on page 21.
  - Select the Clinic and Sessions Types and Locations you are going to use. See ["Clinics"](#) on page 23, ["Setting Session Locations"](#) on page 25, and ["Setting Site Access"](#) on page 25.
  - View the slot types and update the text for patient use. See ["Slot Types Tab"](#) on page 27.
- Configure Online Repeats, enable Online Repeats see ["Enabling Online Repeats"](#) on page 29, then configure the following online repeat settings:
  - Add an optional message which displays on all MHOL repeats web pages. See ["Prescription Message"](#) on page 31.
  - Determine how much history is displayed to the patient. See ["History"](#) on page 31.

Now you have configured your Online modules, see the following user guides for further details: [MHOL Online Appointments user guide](#) and [MHOL Online Repeats user guide](#).

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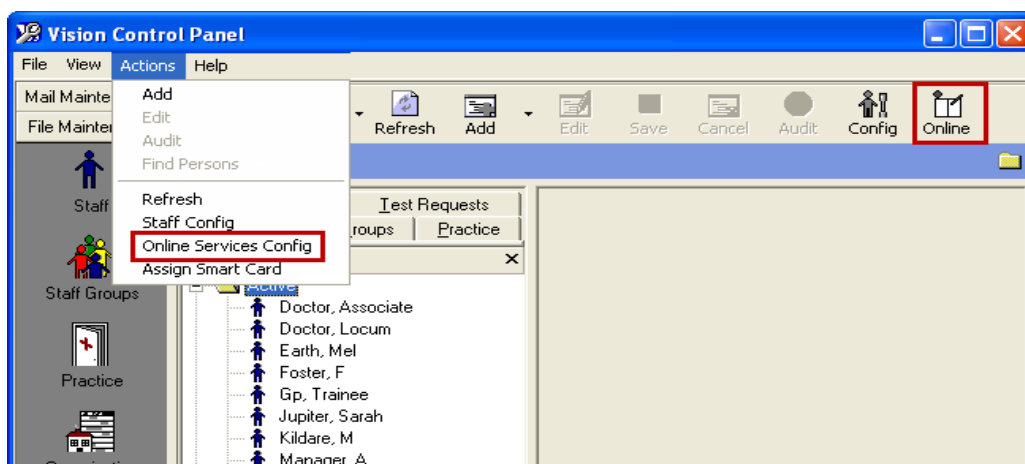
## Enabling Vision Online Services

**NOTE:** Staff must have System Manager (Full) access in Control Panel and Full access to Vision Appointments, to enable and configure Vision Online Appointments.

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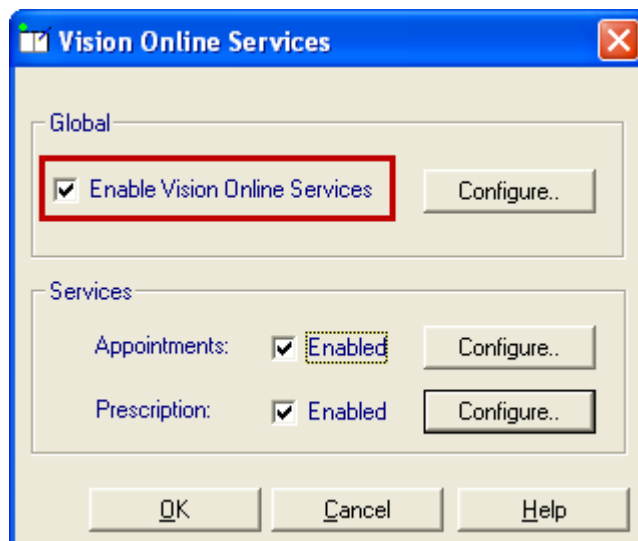
To Activate Vision Online Services:

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. Click the box to **Enable Vision Online Services**.



*Vision Online Services Configuration*

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

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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:

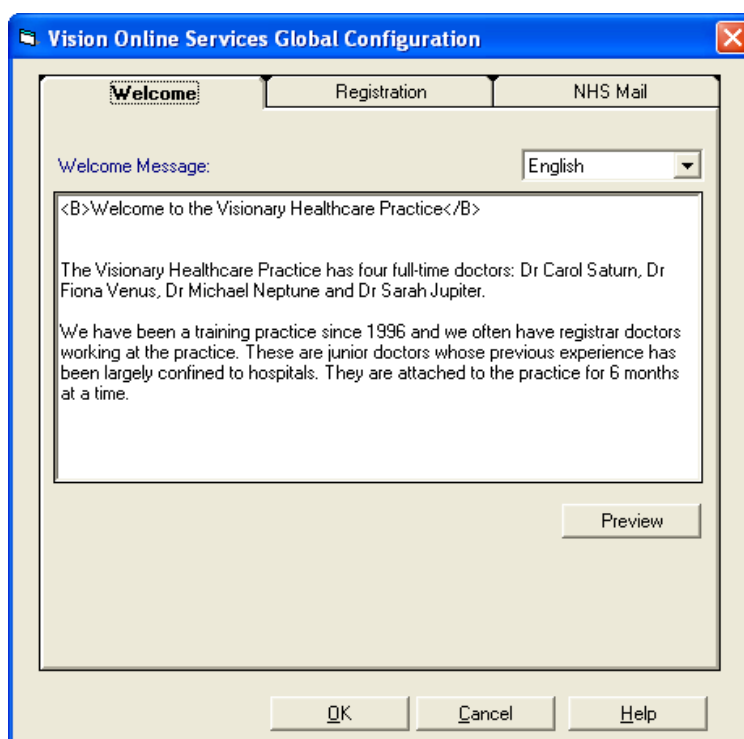
- **Welcome Message** – Create a message displayed on the VOS home page following successful login by the patient.
- **Registration** – Set global invalidation options for unused registration letters and un-activated accounts.
- **NHS Mail** – Create a global email signature.

### Welcome Message

A practice welcome message is displayed on the home page of the My Health Online 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**  button.
2. Select the **Welcome** tab, then select the language using the drop-down box, choose **English** or **Welsh**.
3. Type your message in the welcome message window (max 2000 characters) in the appropriate language. This is displayed on the Home Page of the website following a successful login by your patients.



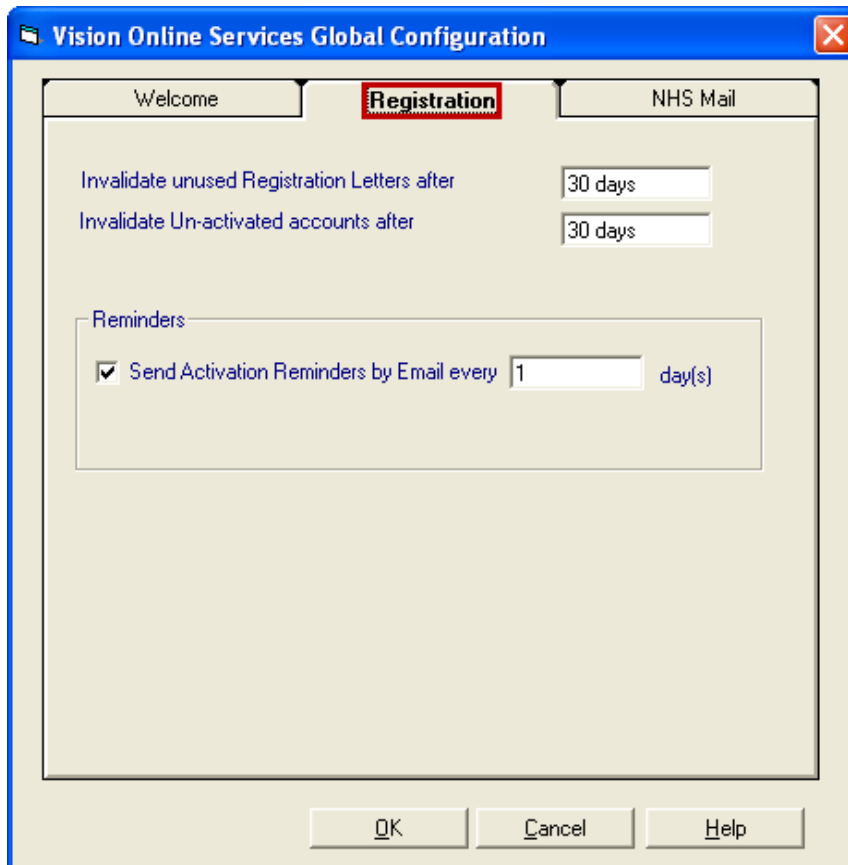
*Welcome Message*

4. Press the **Preview** button to check the message. You can customise your welcome message using HTML formatting tags; see "Formatting HTML Messages" on page 33.

5. Now add the message again, selecting the language from the drop-down box first.
6. Translate your welcome message and type it in the Welcome Message window, click **Preview** to check the message.
7. You now have an English and Welsh version of the welcome message.

## Registration

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



*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.

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**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.

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## Reminders

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

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**NOTE** - By default this service is ticked to enable the service. If you do not want to send email messages remove the tick from the box.

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## NHS Mail – Email Signature

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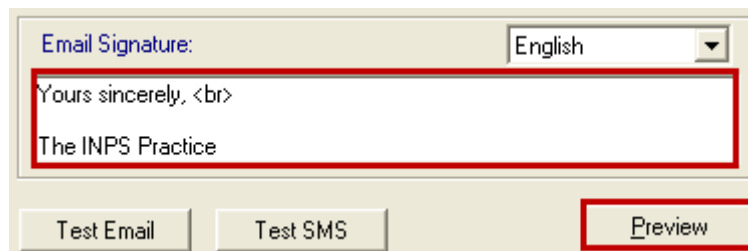
**IMPORTANT** – NHS Mail accounts are currently not available to practices in Wales.

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## Create An Email Signature

You can add an email signature to all emails sent to patients for My Health Online seervices.

1. To create a signature; choose a language from the drop-down box then type the details in the **Email Signature** box in the appropriate language. Click **Preview** to check.



*Email Signature – English*

2. Now add the message again, selecting the language from the drop-down box first.
3. Translate your email signature and type it in the Email Signature window, click **Preview** to check.
4. You now have an English and Welsh email signature.

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

- To activate and configure Online Appointments, see “[Online Appointments Configuration](#)” on page 10.
- To Activate and configure Online Repeats, see “[Enabling Online Repeats](#)” on page 29.

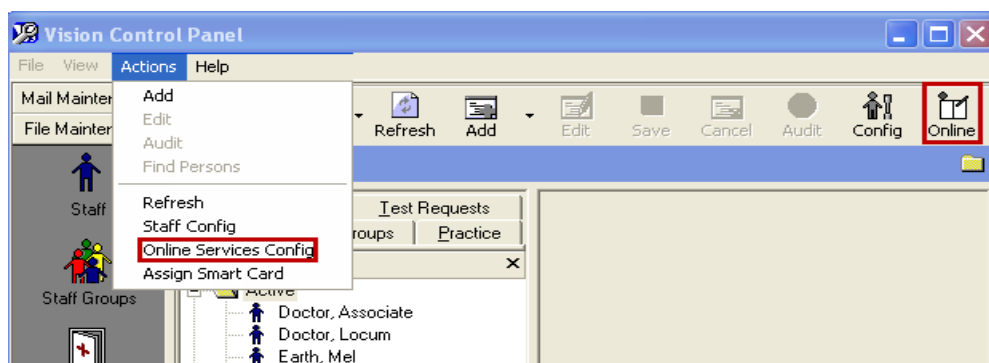
# Online Appointments Configuration

## Enabling Online Appointments

**NOTE:** Staff must have full access to Vision Appointments and Control Panel to configure and setup Vision Online Services and Online Appointments.

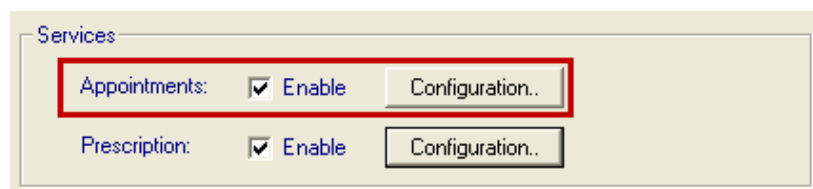
To Activate Online Appointments:

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*

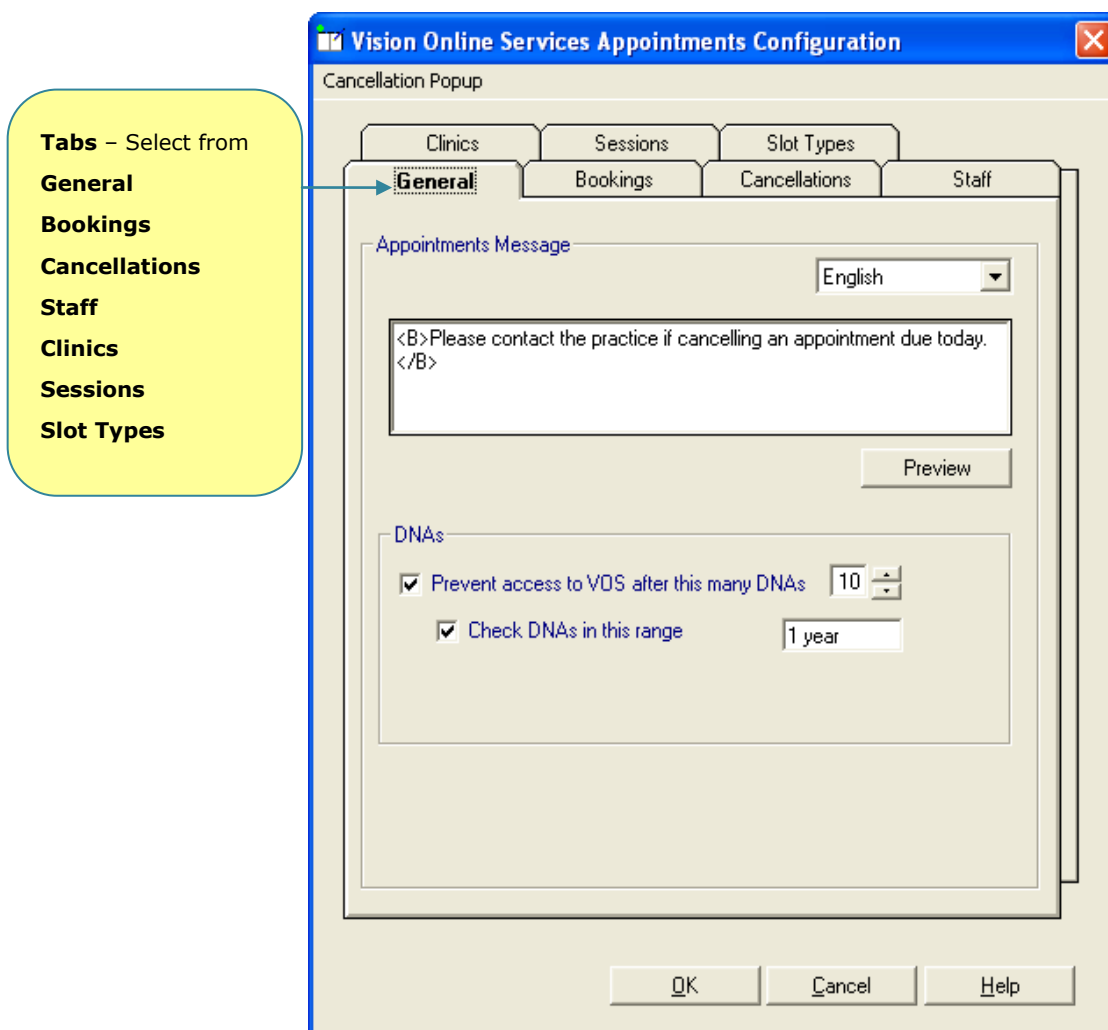
5. Click the **Configuration** button to customise how the service will work for your practice. There are seven tabs which require attention. See “[Configure Online Appointments](#)” on page 11.

## Configure Online Appointments

You now need to determine which staff and sessions are available on the My Health Online 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 12.
- **Bookings** – See “General Tab” on page 12
- **Cancellations** - See “General Tab” on page 12
- **Staff Tab** - See “Staff Tab” on page 21.
- **Clinics Tab** – See “Clinics” on page 23.
- **Sessions Tab** – See “Sessions Tab” on page 25.
- **Slot Type** - See “General Tab” on page 12

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.



*Vision Online Services - Appointments Configuration*

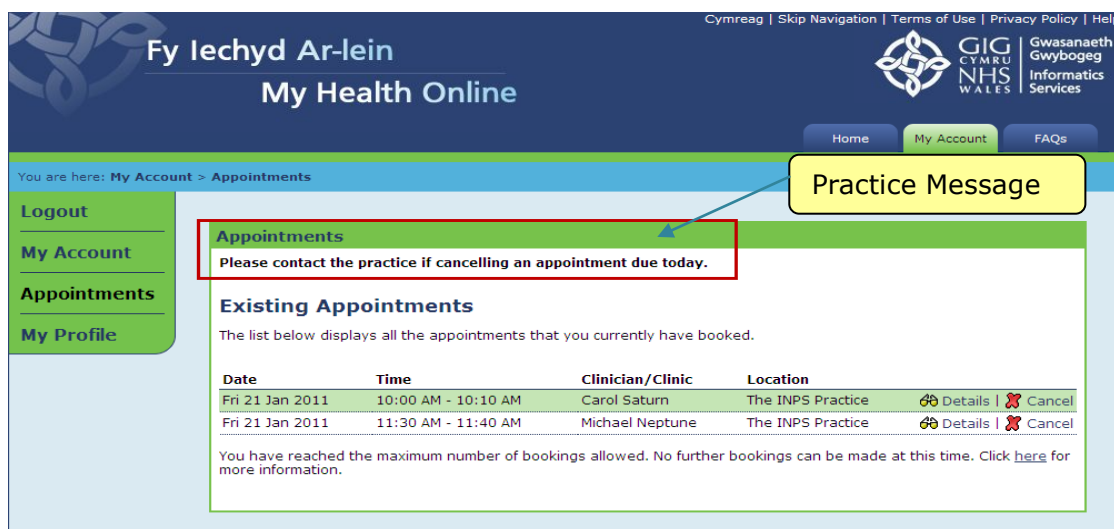
## General Tab

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

- **Appointments Message** – see [Appointments Message](#) on page 12.
- **Did Not Attend (DNA)** - see ["Did Not Attends \(DNA's\)"](#) on page 13.

### Appointments Message

This is a practice specific message which is displayed on each Online Appointments web page. This message must be added in Welsh and English.



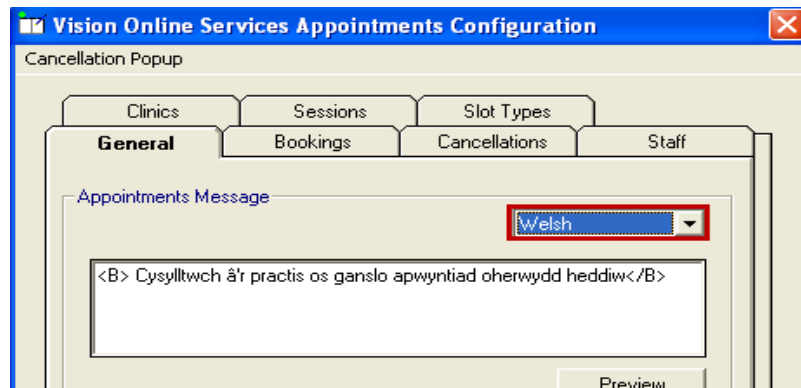
### Add Appointments Message

1. From VOS **Appointments Configuration** select the **General** tab.
2. Select **English** or **Welsh** from the drop-down list. 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 33.



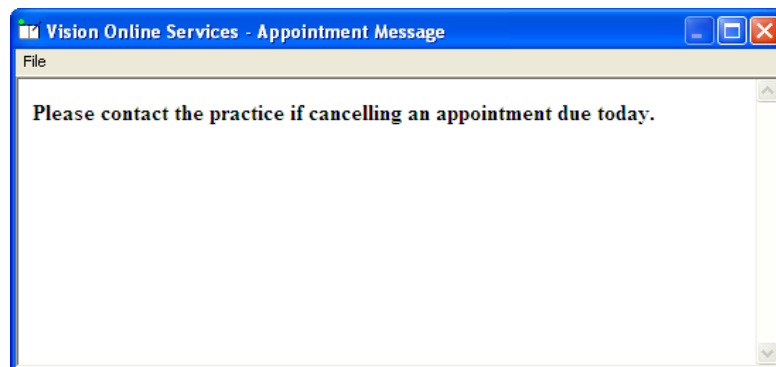
*Appointments Message - English*

3. Choose the next language and type the translation of your text.



*Appointments Message - Welsh*

3. Click **Preview** to check your messages.

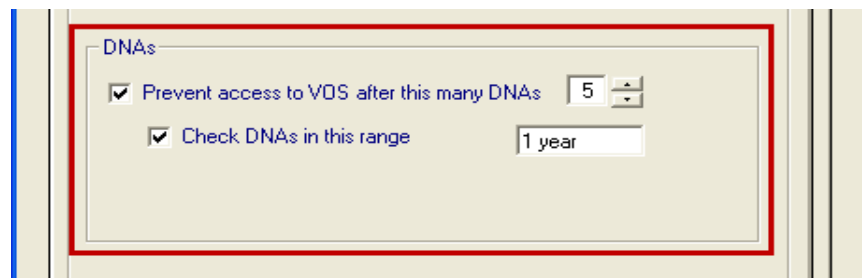


*Appointment Message - Preview*

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 how many DNA's are permitted before the user account is disabled.



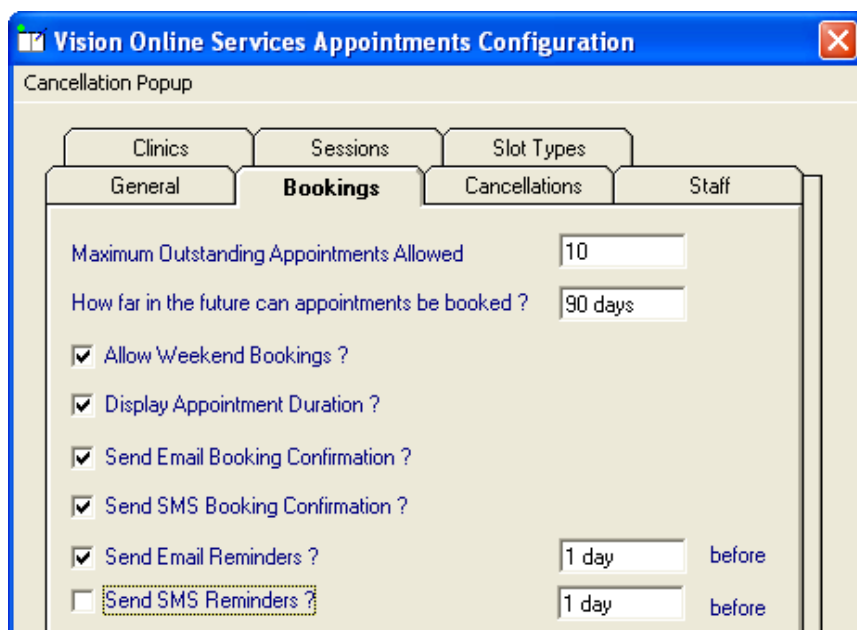
*DNAs*

1. From **VOS Appointments Configuration** select the **General** tab, **DNAs**.
2. 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.
3. 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.
4. 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**.

## Bookings Tab

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



The screenshot shows a window titled "Vision Online Services Appointments Configuration" with a "Cancellation Popup" header. It features a tabbed interface with "Bookings" selected. The "Bookings" tab contains the following settings:

- Maximum Outstanding Appointments Allowed: 10
- How far in the future can appointments be booked?: 90 days
- Allow Weekend Bookings ?
- Display Appointment Duration ?
- Send Email Booking Confirmation ?
- Send SMS Booking Confirmation ?
- Send Email Reminders ? 1 day before
- Send SMS Reminders ? 1 day before

*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.

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

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A close-up of the "Maximum Outstanding Appointments Allowed" field, showing a text input box containing the number "10".

*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."

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

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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.

The screenshot shows the 'My Health Online' interface for 'Fy Iechyd Ar-lein'. The user is logged in and viewing their 'Appointments'. A message states: 'Please contact the practice if cancelling an appointment due today.' Below this, under 'Existing Appointments', it says 'The list below displays all the appointments that you currently have booked.' A table lists two appointments for Friday, 21 Jan 2011. The first is at 10:00 AM - 10:10 AM with Carol Saturn at The INPS Practice. The second is at 11:30 AM - 11:40 AM with Michael Neptune at The INPS Practice. Both have 'Details' and 'Cancel' links. A red box highlights a message at the bottom: 'You have reached the maximum number of bookings allowed. No further bookings can be made at this time. Click [here](#) for more information.'

*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**.

How far in the future can appointments be booked ?

*Future Appointments*

### **Allow Weekend Bookings**

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

Allow Weekend Bookings ?

*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.

Display Appointment Duration ?

*Appointment duration*

<b>Date:</b>	Wednesday 9 Nov 2011
<b>Time:</b>	11:40 AM - 11:50 AM
<b>Duration:</b>	10 minutes
<b>Clinician/Clinic:</b>	Dr Carol Saturn <b>Main Speciality:</b> Speech Therapy <b>Interest Speciality:</b> Ante-natal clinic <b>Role:</b> Partner <b>Gender:</b> Female
<b>Location:</b>	The INPS Practice

*Online Appointment Details – Appointment Duration*

<b>Date:</b>	Thursday 13 Oct 2011
<b>Time:</b>	2:40 PM
<b>Clinician/Clinic:</b>	Dr Carol Saturn <b>Main Speciality:</b> Speech Therapy <b>Interest Speciality:</b> Ante-natal clinic <b>Gender:</b> Female
<b>Location:</b>	The INPS Practice

*Online Appointment Details – No Appointment Duration*

## Booking Confirmation and Reminders

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

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**NOTE – SMS messaging is not available in Wales.**

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If you want the patient to have a reminder prior to their booked appointment tick the **Send Email 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**.

<input checked="" type="checkbox"/> Send Email Booking Confirmation ?	
<input checked="" type="checkbox"/> Send SMS Booking Confirmation ?	
<input checked="" type="checkbox"/> Send Email Reminders ?	1 day before
<input checked="" type="checkbox"/> Send SMS Reminders ?	1 day before

*Booking Confirmation & Reminders*

## Cancellations Tab

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

The screenshot shows the 'Cancellations' tab in the 'Vision Online Services Appointments Configuration' window. The window title is 'Vision Online Services Appointments Configuration' and the subtitle is 'Cancellation Pop-up'. The 'Cancellations' tab is selected, with other tabs being 'Clinics', 'Sessions', 'Slot Types', 'General', 'Bookings', and 'Staff'. The settings include:

- How close can appointments be cancelled? 00 hours 00 mins.
- Send Email Cancellation Confirmation ?
- Send SMS Cancellation Confirmation ?
- Cancellation Reasons: English (dropdown)
- Double Click the cancellation reason to edit the VOS text :
- Table with columns 'Vision Text' and 'VDS Text':

Vision Text	VDS Text
<input checked="" type="checkbox"/> PROBLEM RESOLVED	PROBLEM RESOLVED
<input checked="" type="checkbox"/> TRANSPORT PROBLEMS	TRANSPORT PROBLEMS
<input checked="" type="checkbox"/> NO REASON GIVEN	NO REASON GIVEN
<input checked="" type="checkbox"/> MOVED TO OTHER GP /...	Appointment re-arranged at ...

*Cancellation 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.

This close-up shows the 'Cancellation Settings' section, including the time period input fields and the confirmation checkboxes.

- How close can appointments be cancelled? 00 hours 00 mins.
- Send Email Cancellation Confirmation ?
- Send SMS Cancellation Confirmation ?

*Cancellation Settings*

---

**NOTE** – SMS messaging is not available in Wales.

---

If you want the patient to be sent an Email tick the appropriate box, an email will be sent each time an 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*

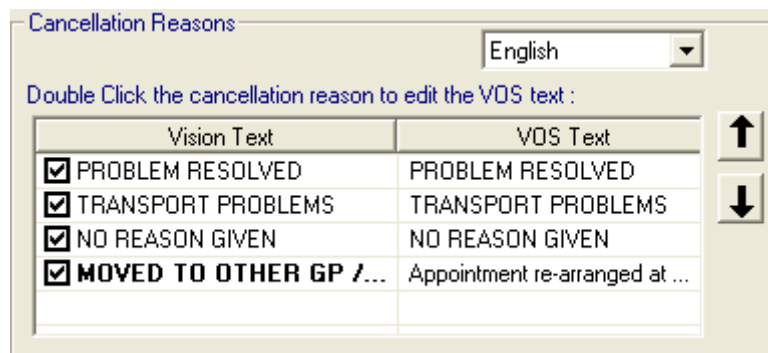
## Cancellation Reasons

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 add a Welsh translation. 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”.

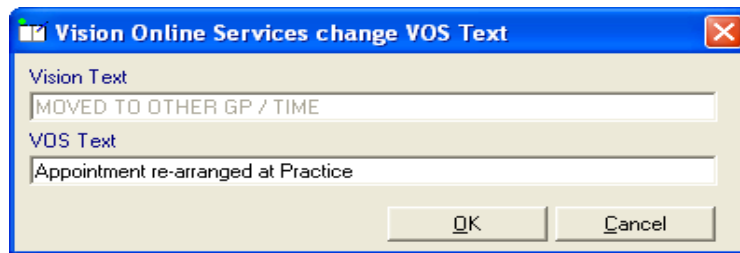
## Add Alternative text

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



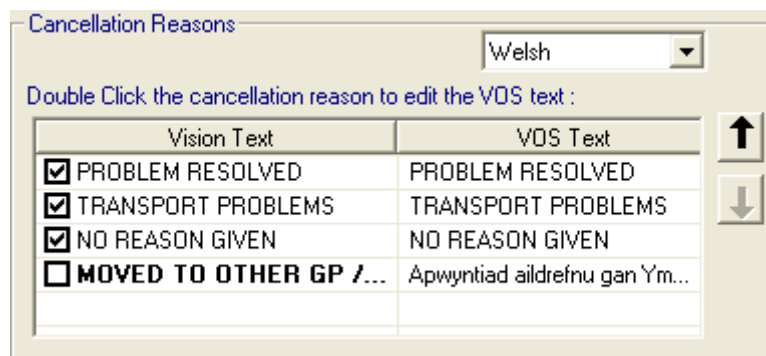
*Cancellation Tab - Cancellation Reasons - English*

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



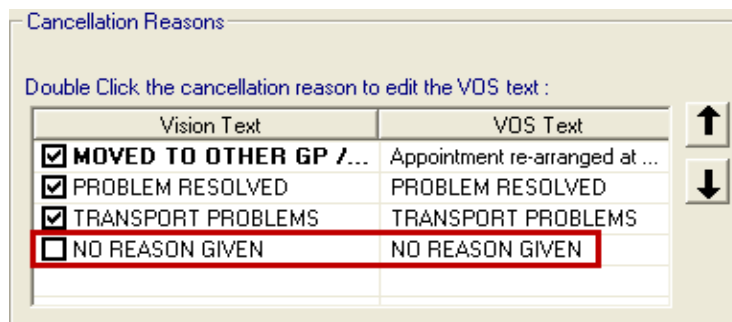
*VOS change VOS Text*

3. Type the alternative text in the VOS text window.
4. Select **Welsh** from the drop-down list, double click the cancellation reason and type the welsh translation in the **VOS Text** window. Add a translation for each cancel reason listed.





*Cancellation Tab - Cancellation Reasons - Welsh*

5. Removing the tick from the tick box hides both the English and Welsh version of the cancellation reason from the patients online.



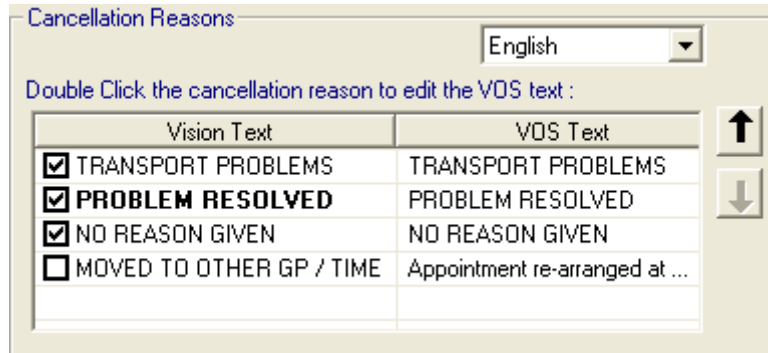
*Cancellation Reasons – Reason Deselected*

5. 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.

---

**NOTE** – Changing the order of the English list also changes the Welsh list.

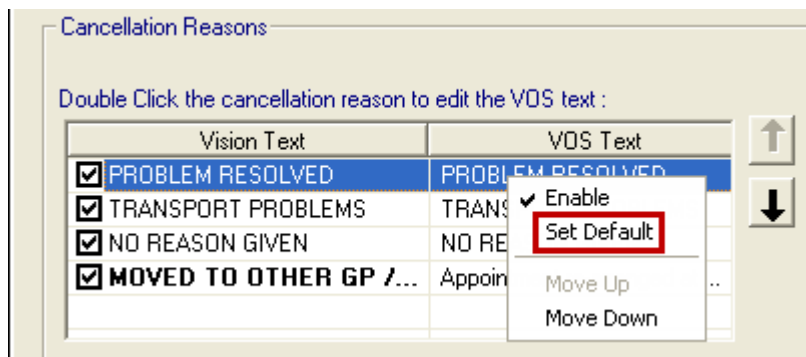
---



*Cancellation Reasons – Positions changed*

- 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.

**NOTE** – The default is applied to the English and Welsh translation.



*Cancellation Reasons – Set Default*

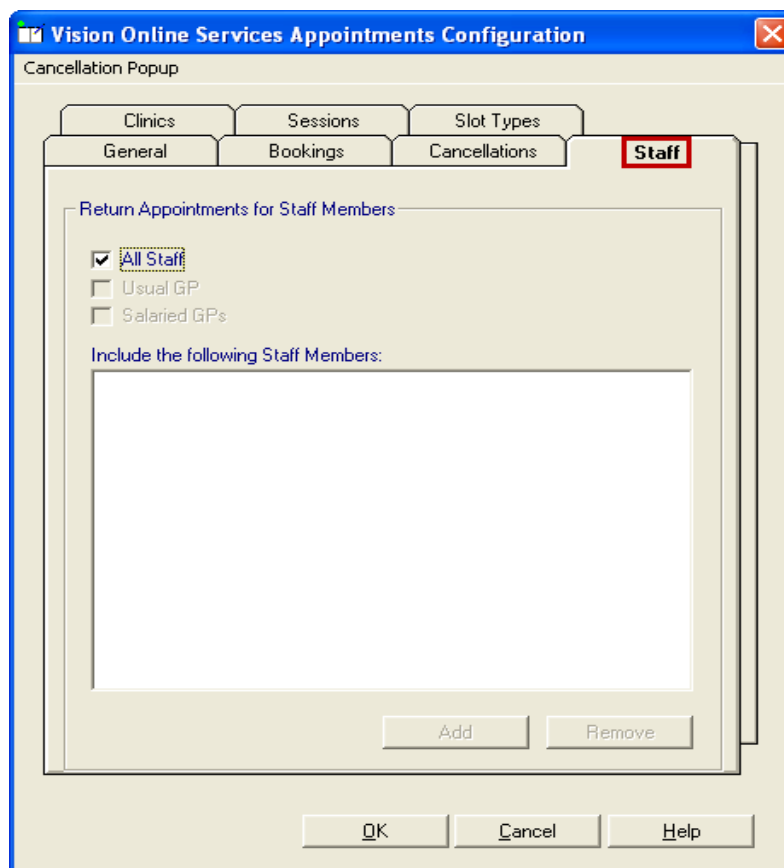
**NOTE** – The default can be changed; right click and select **Remove Default**.

## 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.



*VOS Appointments – Staff Tab*

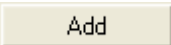
2. Use the radio buttons to determine which staff your patients will be able to book appointments with on the Vision Online Appointments website.
3. You can use the radio buttons to select:
  - **All Staff** – All active appointment book owners.
  - **Usual GP** – Includes only those GPs recorded as Usual GP in patient registration.
  - **Salaried GP** – Includes those GPs set as Salaried GPs in File Maintenance.

---

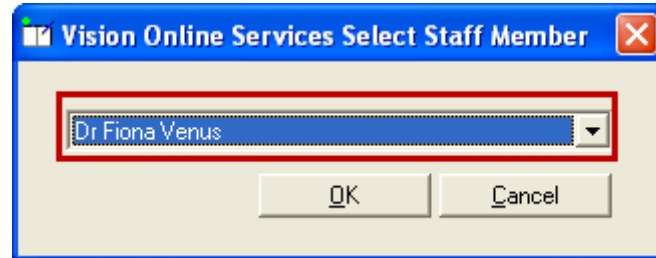
**IMPORTANT** – Use the radio buttons **OR** setup staff individually. Do **not** use both setup options.

---

4. Alternatively, you can also setup members of staff individually, remove the

tick from the **All Staff** box, then click the **Add**  button. This will display a drop-down menu listing all clinical staff from the File Maintenance list.

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



*Add Staff Member*

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

---

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


---

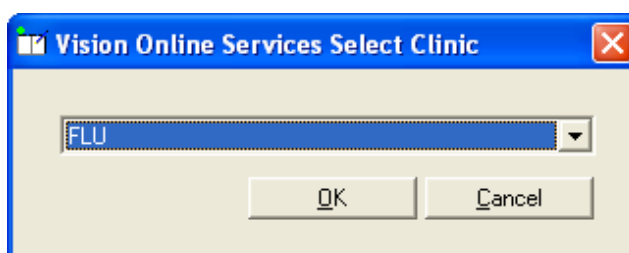
### Add Clinics

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**  button, the VOS Select Clinic window will open.

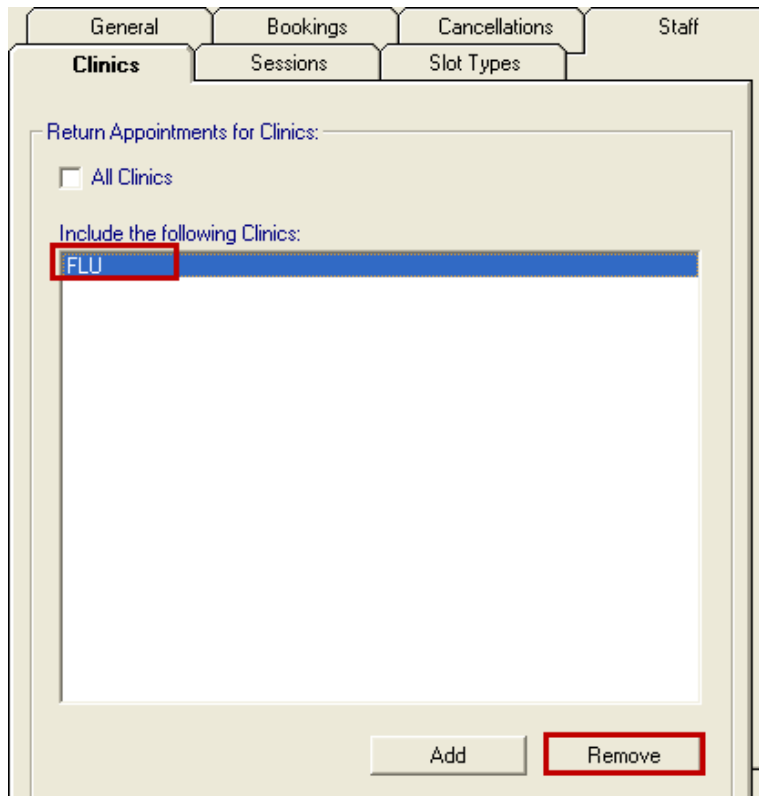


*VOS Select Clinic*

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.

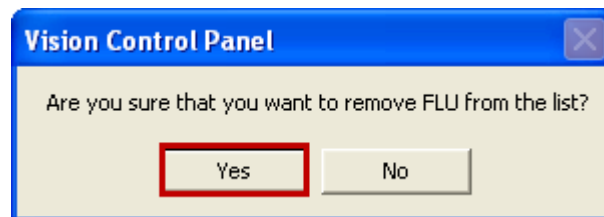
## Remove Clinic

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

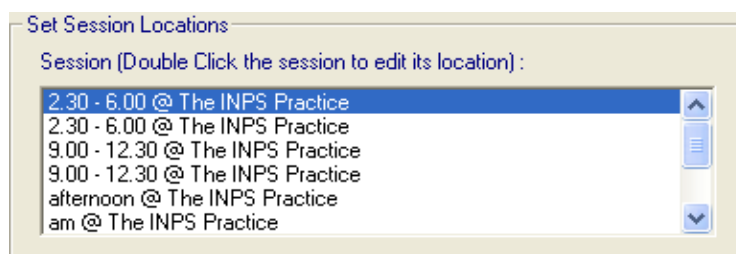
This is used to configure the following:

- **Set Session Locations** - See "Setting Session Locations" on page 25
- **Sites Configuration** - See "Setting Site Access" on page 25

### Setting Session Locations

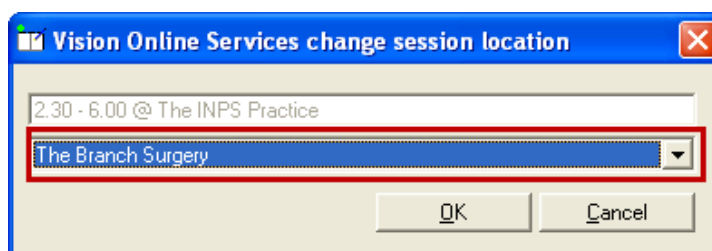
Use this facility to link a session to a location.

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**.



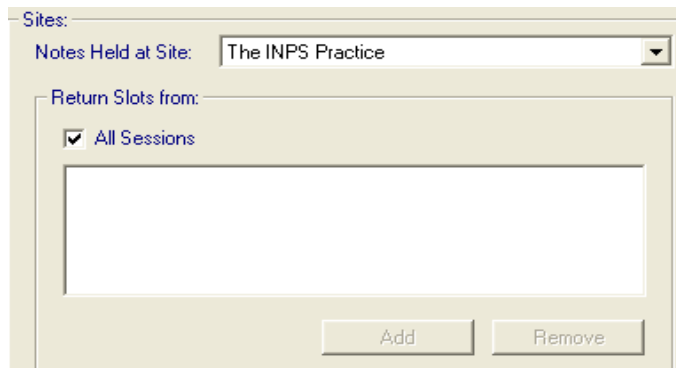
*VOS Change Session Location*

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

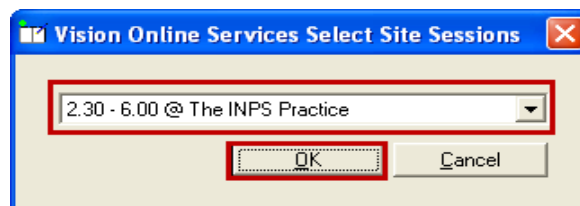
Site configuration is used to specify which Appointment session should be included on the MHOL website. This enables a practice to limit which sessions are included in Online Appointments.

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**.



Set Sites

- Alternatively, add the sessions manually.
- 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.



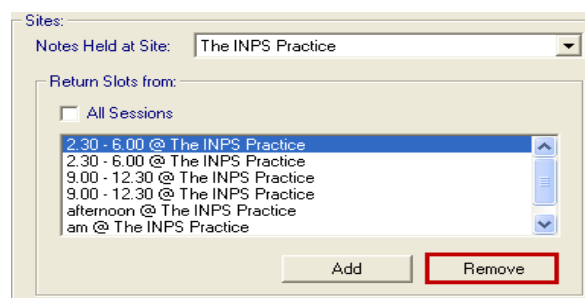
Select Sessions

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

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

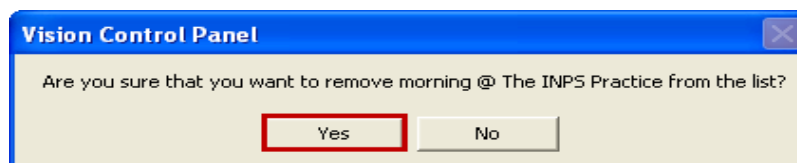
## Remove Session

- To remove a Session from the list, click to highlight the required session, then click the **Remove** button.



Sessions - Remove

- 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. You can also add a Welsh translation.

Search Filter				
Date	Day	Time	Clinician/Clinic	Location
Next 48 Hours	Any	Any Time	Multiple	The INPS Practice
Save Filter				
Date	Time	Clinician/Clinic	Location	
Wed 23 Nov 2011	11:00 AM - 11:10 AM	Dr Carol Saturn	The INPS Practice	Details   Book
Main Speciality: <i>Speech Therapy</i> Interest Speciality: <i>Ante-natal clinic</i> Role: <i>Partner</i> Gender: <i>Female</i>				
Wed 23 Nov 2011	11:10 AM - 11:20 AM	Dr Carol Saturn	The INPS Practice	Details   Book
Appointment Type: <b>Book on the Day</b> Main Speciality: <i>Speech Therapy</i> Interest Speciality: <i>Ante-natal clinic</i> Role: <i>Partner</i> Gender: <i>Female</i>				
Wed 23 Nov 2011	11:30 AM - 11:40 AM	Dr Carol Saturn	The INPS Practice	Details   Book
Main Speciality: <i>Speech Therapy</i> Interest Speciality: <i>Ante-natal clinic</i> Role: <i>Partner</i> Gender: <i>Female</i>				
Wed 23 Nov 2011	12:10 PM - 12:20 PM	Dr Carol Saturn	The INPS Practice	Details   Book
Appointment Type: <b>Emergency Only!!!</b> Main Speciality: <i>Speech Therapy</i> Interest Speciality: <i>Ante-natal clinic</i> Role: <i>Partner</i> Gender: <i>Female</i>				

*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".

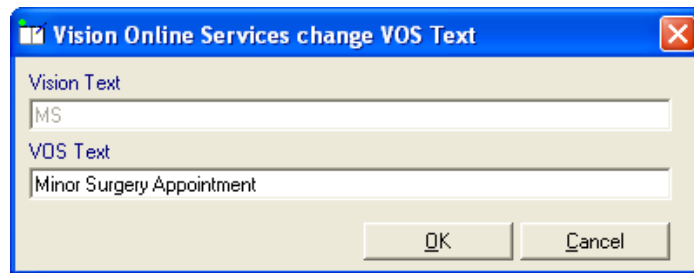
## Add Alternative text

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

General		Bookings	Cancellations	Staff
Clinics		Sessions	Slot Types	
English				
Vision Text	VOS Text			
Blank	Blank			
Normal	Normal			
Emergency	Emergency			
BOD	Book on the Day ONLY			
MS	Minor Surgery Appointment			
Phone	Phone			
Coffee Break	Coffee Break			
paperwork	paperwork			
VOS by Default	VOS by Default			
Web	Online Appointment			
Diabetes	Diabetic Clinic - booked by ...			
THIS IS A TEST	which text is displayed			

*General Tab - Cancellation Reasons*

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. Then, select **Welsh** from the drop-down list, double click the slot type and type the welsh translation in the **VOS Text** window. Add a translation for each cancel reason listed.
5. Now setup has finished, click **OK** to save and return to the VOS Configuration screen.
6. Click **OK** to close.

# Online Repeats Configuration

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## Enabling Online Repeats

**NOTE:** Staff must have System Manager (Full) access in Control Panel to enable and configure Vision Online Repeats.

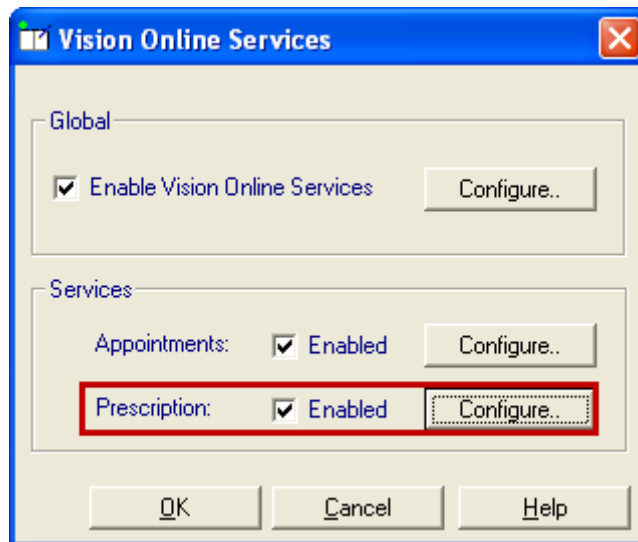
Practices who have previously setup and used Online Appointments can quickly configure MHOL for Online Repeats; see “[Enable Online Repeats](#)” below.

If you are new to MHOL you first need to enable VOS and add a Welcome message, see “[Enabling Vision Online Services](#)” on page 6.

## Enable Online Repeats

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 30

---

## Configure Online Repeats

There are two 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 32
- **History** – You can set a time period, which will determine how many historic repeat entries are displayed to the patient. See “[History](#)” on page 32

**Vision Online Services Prescriptions Configuration**

**General**

Prescriptions Message: English

<b>Please allow 48 hours before collecting your prescription</b>

Preview

**History**

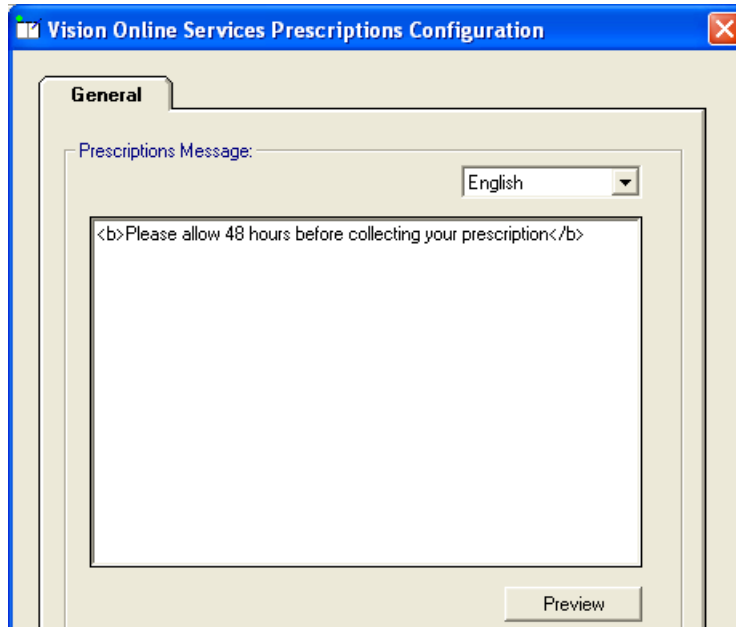
Show request history up to 3 months

OK Cancel Help

*MHOL Prescriptions Configuration*

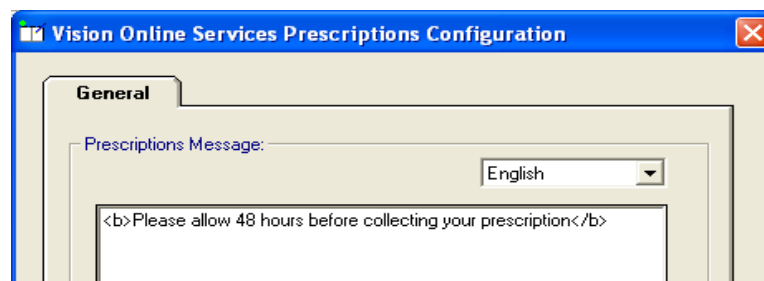
## Prescription Message

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



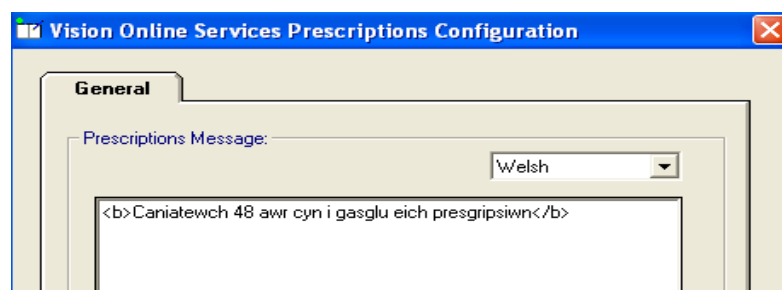
*MHOL Prescription Config – Prescription Message*

2. Select **English** or **Welsh** from the drop-down list. Type your prescription message in the **Prescriptions Message** window.

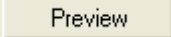


*Prescription Message - English*

3. Choose the next language and type the translation of your text.



*Prescription Message - Welsh*

4. Press the **Preview**  button to check the messages. You can customise your prescription message using HTML formatting tags; see "**Error! Reference source not found.**" on page 33.

## 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.



History

Show request history up to 3 months

*MHOL Prescription Config - History*

# Appendix

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## Formatting HTML Messages

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

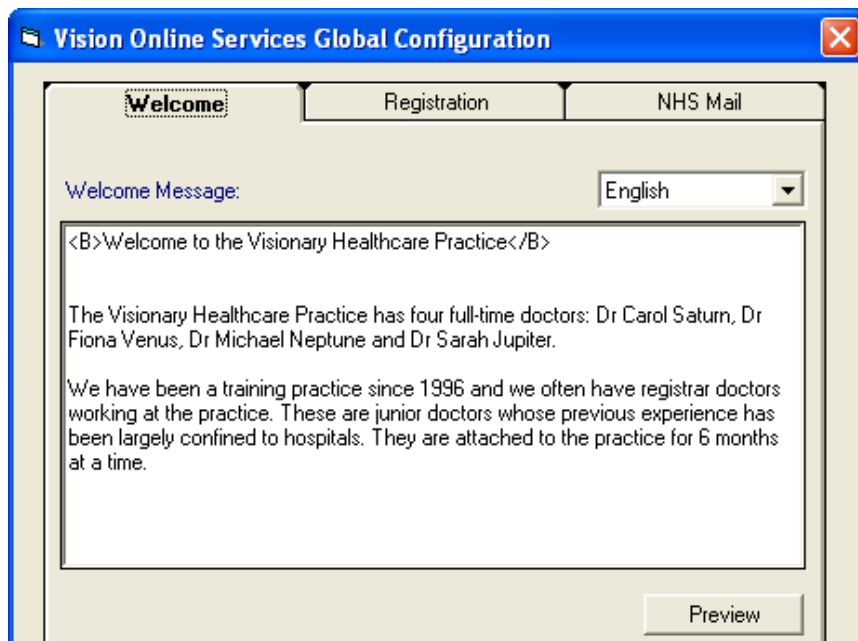
- Used either side of a keyword eg <html> you wish to format.
- The tag always has angle brackets eg <html> denoting the starting and closing of the tag.
- HTML tags normally come in pairs eg <b> (the starting tag) and </b> (the closing tag)
- You can use multiple tags, but each tag must have brackets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

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
<b>	</b>	<b>Bold</b> text
<big>	</big>	<b>Big text</b>
<i>	</i>	<i>Italic text</i>
<small>	</small>	Small text
<sub>	</sub>	Subscript text
<sup>	</sup>	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>



Configuration – Welcome Text

Will be displayed as:

**Welcome to the Visionary Healthcare Practice**



Welcome Message

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