

# Vision Appointment Wizard Extra

---

Date: January 2011 - Designed to work with Vision Appointment Wizard



## Objective

To **add** additional data to the original Appointment Wizard spreadsheet, mainly required by Walk-in Centre sites:

- Registration Status
- NHS Number
- Surname
- Forename
- DOB
- Gender
- Ethnicity
- Patient Address Details
- GP/Surgery Details

## Instructions

There is an additional program you will need to download and run directly after running the normal Appointment Wizard, which is called "Appointment Wizard Extra" as shown by the image.

**However, you must run 2 searches in Vision BEFORE running this additional program.**

- One search extracts all the patient address details & ethnicity
- The other search extracts all the Walk-in Centre patients GP details



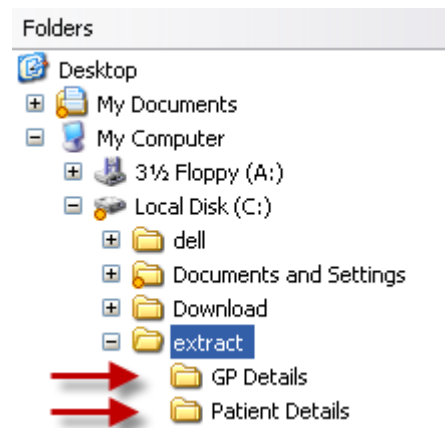
## Create Two Folders

Before building these searches you will need to create 2 new folders in your Extract folder such as:

- Patient Details
- GP Details

If on a hosted solution this will be P:\Extract\

Otherwise it will be C:\Extract (as shown in the image)

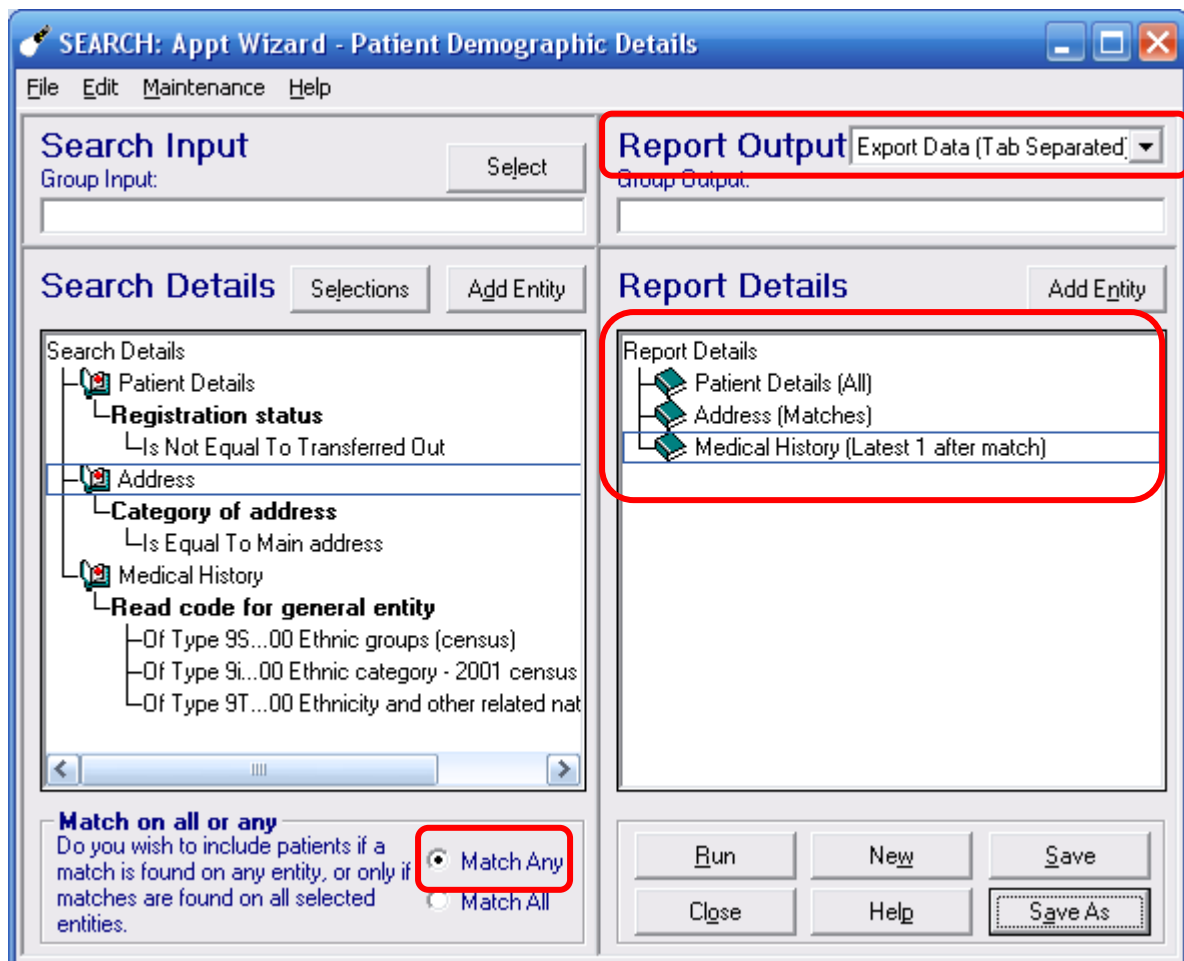


You may call the folders whatever you like but the when you run the 1<sup>st</sup> search below (Patient Demographic Details) you will be asked where you want to store the data, which **MUST** go directly into ?:\Extract\**Patient Details** folder

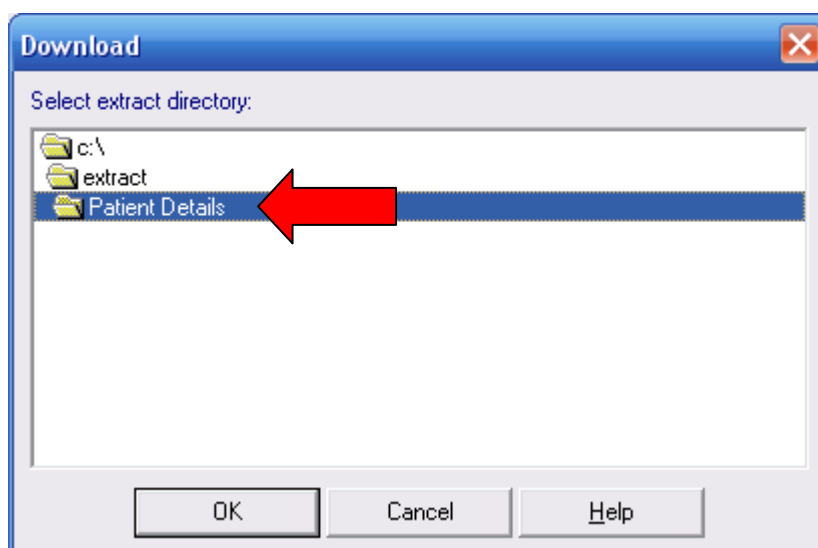
The other search data **MUST** go into a different folder i.e. ?:\Extract\**GP Details**, **otherwise the patient details will be overwritten by the first search** and the wizard will fail.

## Build 1st Search

Build the search exactly as shown below, especially areas marked in red.

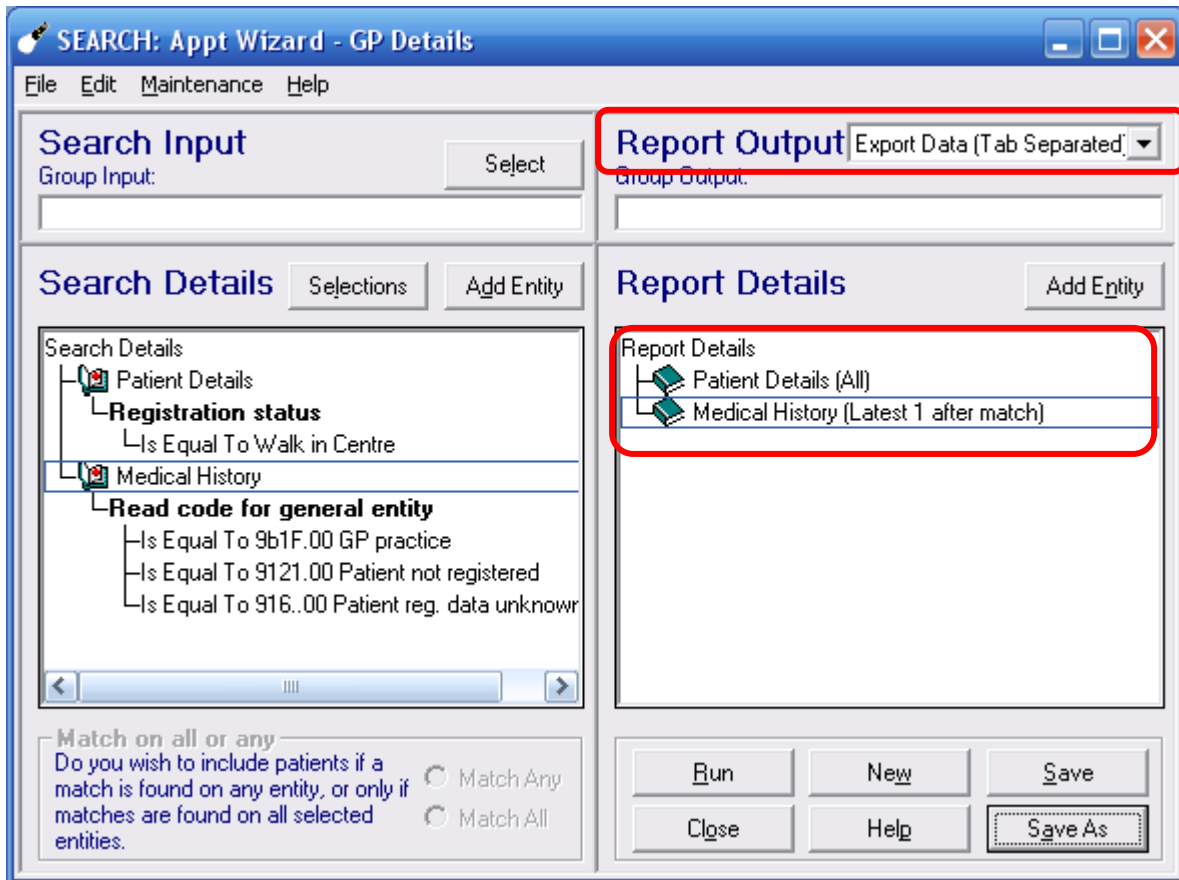


Please make sure the search output details go into the correct folder, when the search is run.

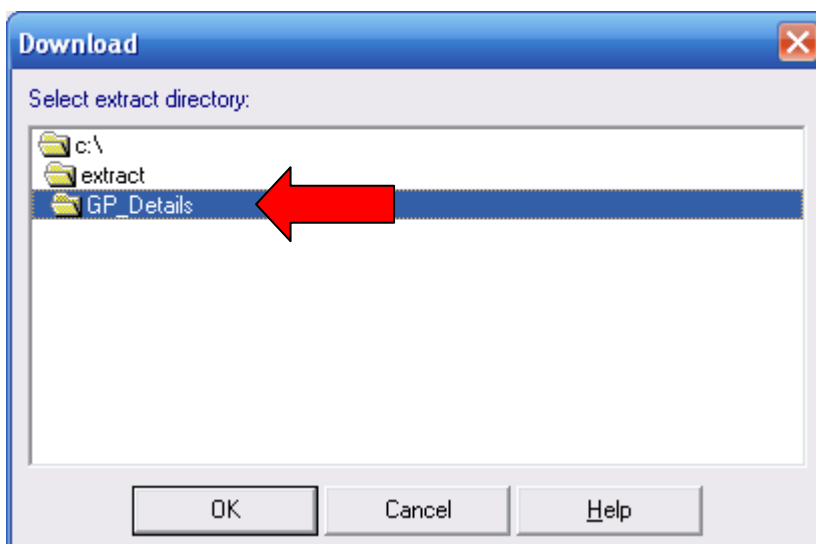


## Build 2<sup>nd</sup> Search

Build the search exactly as shown below, especially areas marked in red.



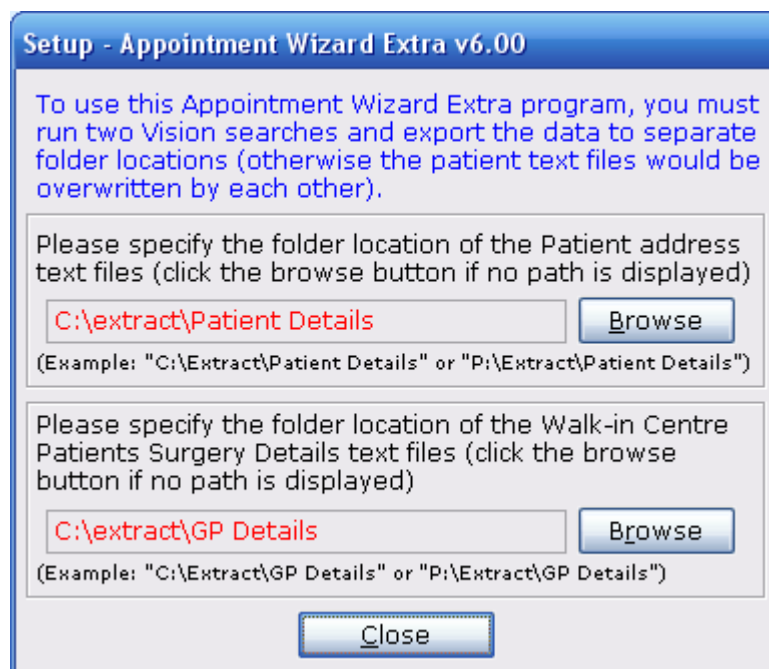
Please make sure the search output details go into the correct folder, when the search is run.



## Run the Program

Once the two Vision searches have been run you are now ready to add the additional data into the original Appointment Wizard spreadsheet.

1. Make sure that the original Appointment Wizard spreadsheet is still open.
2. Double-click on Appointment Wizard Extra icon to open it.
3. Click on the Vision Folder Location button (for first time use)
4. Click each browse button and locate the correct folder (as shown below)
  - a. Patient Details
  - b. GP Details



5. Now click Run Wizard button to start the program.

Note: Always make sure you do not touch the keyboard or mouse while the program is running, as this will interrupt the process and cause it to fail.

### **PLEASE NOTE:**

**Once the wizard has completed it will contain lots of patient demographic data in the Excel spreadsheet and therefore should NOT really be sent to any third party.**

If you do wish to export this data or only send specific data:

1. Hide each column you do NOT want to send to a third party; by highlighting the entire column (i.e. click on top column letter), then right mouse click and select Hide
2. Press **F5** on your keyboard and click on **Special**.
3. Select **Visible Cells Only** and click OK
4. Highlight all the data you want to copy or Ctrl+A for all data and select **COPY**
5. Open a new spreadsheet and **PASTE**