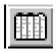
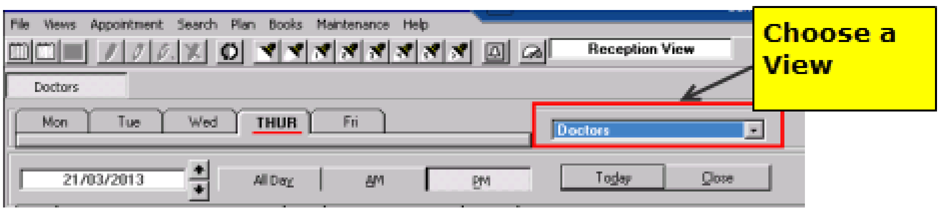
Day to Day Appointments for Reception

Appointment Hotkeys

F1	On-screen Help
F2	Any Slot Search
F3	Patient Search
F4	Specific Search
F5	Reception View
F6	Book View
F7	Day Plan
F8	Personal Plan
Shift+Ins	Make Booking
Ctrl+Ins	Special Booking
Ctrl+W	Edit Booking
Shift+Del	Cancel Booking

Selecting the Reception View

1. Open **Appointments** and click on the **Reception View**  icon.
2. Choose your view eg Doctors, Nurses etc.



Appointments Reception View

Booking an Appointment for Today

1. Make sure you are on the correct day, click the **Today** 

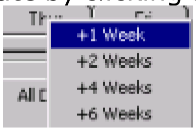
icon and click on **All Day**, **AM** or **PM** 

.
2. Look for the person/book owner you want to make the booking with.
3. Double click on the appointment time.

4. Enter the patient's details and click **Find.**
5. Highlight the patient and click **OK**.
6. The Booking form appears. Make sure all the booking information is correct and change if necessary. Click **OK** to save the booking and exit the form.

Booking a Future Appointment

1. Move to the correct date by clicking on the calendar 

or right click on the Day tab 

and select **+1week**, **+2weeks**, **+4weeks** or **+6weeks.**
2. Look for the person you want to make the booking with.
3. Double click on the appointment time.
4. Enter the patient's details and click **Find.**
5. Select the patient and click **OK**.
6. The Booking form appears. Type in the free text comments as required and make sure all the booking information is correct, change if necessary. Click **OK** to exit the form.

Special Bookings

A special booking is for someone who is not on your practice list.

1. Click on the appointment you want to book, right click and choose **Special Booking**, or click the icon.
2. Click in the **Special booking** window and record the details. If required, enter any free text comments. Click **OK** to close the screen.

Note - Clinicians cannot use the Special booking to select a patient in Consultation Manager. A Special Booking appointment would need to be replaced with a registered patient if information is to be added to the patient's record.

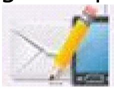
Edit a Booking

1. To edit a booking, right click on the patient's appointment and choose **Edit Booking** or click on the Edit booking icon.
2. This displays the Edit Booking screen, amend as required and click **OK** to save the changes.

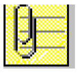
Update Patient Contact Details

You can update the patient contact details whilst booking an Appointment.

1. Double click on the appointment time.

2. Enter the patient's details and click **Find**
3. Select the patient and click **OK.**
4. The Booking form appears. To change the patient contact details, click the **Update Patient Contacts** button . Add or amend the details as required, click the cross to close the form.

Moving a Booking to a Different Day

1. To move a booking for a patient and re-schedule it for a different day, drag and drop the appointment to the clip note .
2. Find the new appointment date and time.
3. Drag the patient's name off the clip note and drop it on the new date and time.
4. A warning message appears asking you to confirm that you want to cancel and re-schedule, click **OK**.

Moving a Patient's booking to a new time on the Same Day

1. To move a booking for a patient and re-schedule it for the same day, drag and drop the appointment to a new appointment time.
2. A warning message appears asking you to confirm that you want to cancel and re-schedule, click **OK**.

Cancel a Booking

1. To cancel a booking, click on the patient's appointment, right click and choose **Cancel** or use the Cancel Booking  icon.
2. Select a Cancellation Reason and click **OK.**

Search for a Patient's Appointment

You can perform a Patient Search which finds all booked appointments for a selected patient.

1. On the Reception View - press **F3**.
2. If you have a patient selected, their details are loaded automatically in the Patient Search box. To change the patient double click on the patient's name and select a different patient.
3. Enter the patient's details and click **Find.**
4. Select the patient and click **OK**.

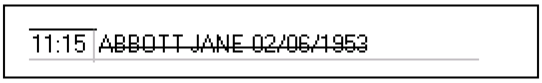
5. Once you have the correct patient, change the dates or leave as the default eg 3 months back and 3 months ahead.
6. A list of the patient's appointments is displayed.
7. Click **Close** to exit the screen.

Searching for an Appointment

1. To find an appointment using the search facility, select the second torch  **Specific Slot.**
2. Choose the criteria you want and click **Search**.
3. A list of free slots are shown, select the one you want by double clicking on it.
4. Enter the patient's details and click **Find.**
5. Highlight the patient and click **OK**.
6. The Booking form appears. Type in the free text comments as required and make sure all the booking information is correct, change if necessary. Click **OK** to exit the form.
7. A confirmation box appears containing details of the appointment, click **OK**, and the appointment is booked.
8. Click **Close** to exit the Free slot screen.

When a patient arrives

1. When a patient arrives double click on the appointment.
2. An Appointment Status window is displayed, with the Arrived Surgery time entered automatically. Click on **OK** to clear the Appointment Status window and confirm the arrival time.
3. The status of the appointment changes to arrived and a line is inserted on the appointment to indicate the patient has arrived.

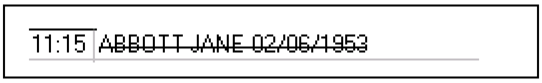


Patient arrived

Appointment Status

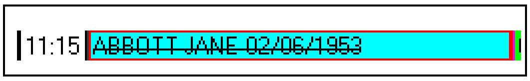
The following appointment statuses are displayed in both the Reception and Book View:

- **Patient Waiting** - When a patient has arrived and checked-in, the appointment status changes to waiting and a line appears through the appointment slot.



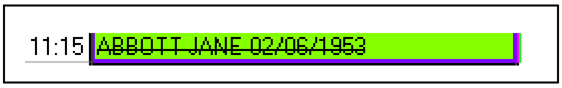
Appointment Waiting

- **In Consultation** - When a patient is in consultation the appointment background colour changes to turquoise.



Patient In Consultation

- **Seen** - When a patient has left the consultation the appointment background changes to green.

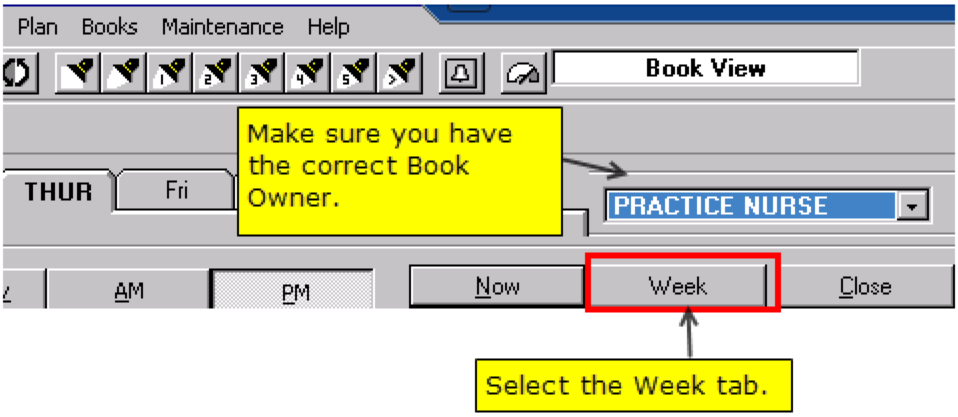


Patient Seen

Book View

Appointments can be booked, cancelled, moved and searched for on the Book view.

1. To access the book view select the **Book view** icon in Appointments or you can double click on the book owner on the Reception View.
2. You navigate the view similar to the Reception view but you can also look at appointments for a whole week.
3. Make sure you have the correct Book owner displayed and choose the **Week** tab



Book View - Week tab