






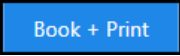

## Appointments Quick Start Guide

### Different Appointment's Views


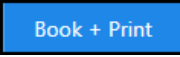

- **Reception View** – The default view, displays all the clinician sessions for the selected day.
- **Current Appointment View** - Displays appointment details for the next hour and any DNAs from the previous hour.
- **Dashboard View** - Displays an 'at a glance' overview of current sessions.

### Booking an Appointment for Today

1. From the **Reception View** select a free slot, you can use **Find a Free Slot**  to do this.
2. The booking form displays and the appointment slot displays as **Locked**  for other users.
3. In **Patient name**, enter the patient's surname and/or date of birth and select **Search**  or press **Enter** on your keyboard.

4. **Patient Search Results** screen displays, filter the results if necessary and select the patient you require.
5. The **Booking Form** displays, complete as required.
6. Select either **Book and Print**  or **Book**  as appropriate.

### Making a Special Booking

- A **Special Booking**, is an appointment for someone who is not one of your registered patients:
1. From the **Reception View** select a free slot, you can use **Find a Free Slot**  to do this.
  2. The booking form displays, tick **Special Booking**.
  3. Complete as required.
  4. Select either **Book and Print**  or **Book**  as appropriate.

### Editing a Booking


An appointment can be edited up to a maximum of seven days passed its booking date.

You can edit an existing appointment quickly and easily:

1. From either **Reception**, **Weekly** or **Day** screens, select the appointment.
2. The booking form displays, make any changes required.
3. Select **Update** to save.

### Adding and Updating Patient Contact Details

You can maintain a patient's **Contact Details** from **Appointments**:

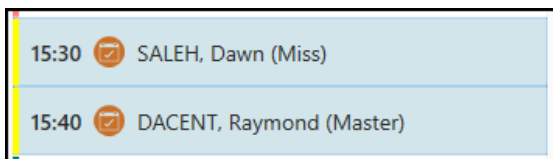
1. Select the patient and open the **Patient Details View**.
2. **Patient Contact Details** display under **Demographics**, to amend them in any way, select **Edit** .
3. You can now either **Add** or update details.



## Move a Booking to a Different Day

To move an appointment from the **Reception View** or **Current appointments** screens:

1. Right click on the appointment(s) you want to move:



2. The toolbar at the top of the screen displays, select **Move via clipboard**



3. If you are in the **Current appointments** view, select the **Reception View** screen behind it to close.

4. Select **Open Clipboard** , your moved appointments display on the **Moved** tab.

5. Find the appointment slot required and drag and drop the moved appointment(s) from the **Clipboard** to the new slot

## Move a Booking to a Different Time on the Same Day

From the **Reception View**, you can simply drag and drop them.

### Cancelling a Booking

To cancel a single or multiple appointment(s) from the **Reception View** or the **Current appointments** screen:

1. Right click on the appointment(s) you want to cancel.
2. The toolbar activates at the top of the



3. The **Cancel this appointment** screen displays, complete as required.
4. Select **Yes** to confirm.



## Appointment Status Overview

The **Reception View**, **Current appointments view** and **Patient view** display the status of a patient's appointment using the following:



**Booked.**



**Overdue** – Displays one minute after the appointment time is due.



**Arrived** - When you check the patient in or they self check-in.



**In Consultation** - When the consultation starts.



**Seen** - When the consultation is closed.



**DNA** – Displays ten minutes after the appointment time if the patient has not checked in.



**Web Appointment** - Appointments bookable by your patients online, or against a booked appointment indicating that this was booked online.