



Appointments Setup Quick Start Guide


Extension Plan

On startup, **Appointments Setup** displays your **Extension plan**, this provides an overview of your practice's weekly plans and optionally, slot utilisation details. From here you can:

- Navigate to the main **Appointments Setup menu**.
- Extend books and manage plans.


Accessing the Appointments Setup Menu

To access the other features, select **Main**

Menu  from the top right corner of the **Extension plan** screen.


Extending Books

Appointment books have to be extended on a regular basis to allow appointment booking in advance.

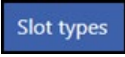

1. From the **Appointments Setup menu**, select **Extension plan**.
2. Select **Extend all owners displayed**  from the top right of the screen.
3. Read the confirmation message and select **Confirm** to extend the books.

Slot Utilisation

The slot utilisation report displays how many appointments have been used per week:

1. From the **Extension Plan** screen, select **Get counts** .
2. The counts populate and display:
 - **Red** - over 80% of slots booked
 - **Pink** - 61% to 80% slots booked
 - **Orange** - 41% to 60% slots booked
 - **Yellow** - 26% to 40% slots booked
 - **Green** - up to 25% of slots booked

Adding a Slot Type

1. From **Appointments Setup Menu**, select **Slot types**  and then select **Add slot type** .
2. The **Create Slot Type** screen displays, complete the details as required.
3. Select **Apply** to save the new slot type.
4. Optional, drag the new slot type to the position in the list you require.

Note - When creating sessions, the slot type at the top of the list is the default slot type.

5. Select **Save** to save your changes.



Slot Availability for Booking

When adding a slot type, you can select to define how far in advance an appointment created from this slot type can be booked. The **Available for booking** options are:



- **Immediately** - Default setting.
- **Hours prior** - Set how many hours in advance the slot can be booked.
- **On day** - The slot is made available on the same day.
- **1 day prior** - The slot is made available one day in advance.
- **2 days prior** - The slot is made available two days in advance.
- **3 days prior** - The slot is made available three days in advance.
- **1 week prior** - The slot is made available one week in advance.
- **Non-bookable** - The slot is not available to be booked.
- **Custom** - Set the number of days in advance the slot can be booked.



Adding a Slot Type Restriction

- From the **Appointments Setup menu**, select **Restrictions**  and then select **Add restriction** .
- The **Create Slot Type Restriction** screen displays, complete the details as required.
- Select **Apply** to add the restriction.

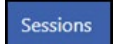
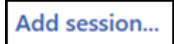



Applying Slot Type Restrictions

- From the **Appointments Setup menu**, select **Slot types - Restrictions** . The existing appointment slot types and restrictions display.
- Tick the individual or multiple slot types to apply a restriction.
- Select **Add restriction** .
- A list of the **Restrictions** displays, select a **Restriction** to apply to the slot type(s).
- Select **Save** to save your changes or **Reset** to cancel any changes.






Creating a Session

You must create and allocate a session to a clinician or clinic before you can book an appointment. To create a session:

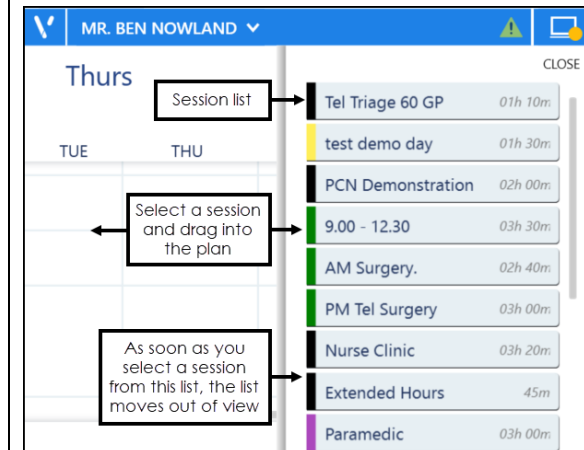
- From the **Appointments Setup menu**, select **Sessions**  and then **Add session** .
 - The **Session Options** screen displays. Enter a name for the session and complete the options as required.
 - Select **Next**  and the **Create Session** screen displays. Complete the details as required.
 - Use the **drag handle**  to extend the session, using the default slot type.
 - To insert an individual slot, select **Options**  and then either **Insert before** or **Insert after**.
- Note** - You can change the slot type using the arrow before extending.
- Select **Apply** to save your changes.

Adding a Weekly Plan

- From the **Appointments Setup menu**, select **Weekly Plans**  and then **Add weekly plan** .
- Enter a name for the plan in the top left corner.

- The **Sessions** define the clinic/surgery, and can be inserted by either:
 - Right click on the plan, and select a session.
 - Alternatively, select the **Add**  button at the top right. A side bar displays containing a list of sessions:

Select the session and drag into the plan. As you drag the session, the side bar moves out of view.



- Once the sessions are in the plan, they can be dragged to a different time if required.
- To copy the session into additional days, right click on a session and select copy. On the required day, right click and select **Paste**.
- Select **Save** to add the weekly plan.