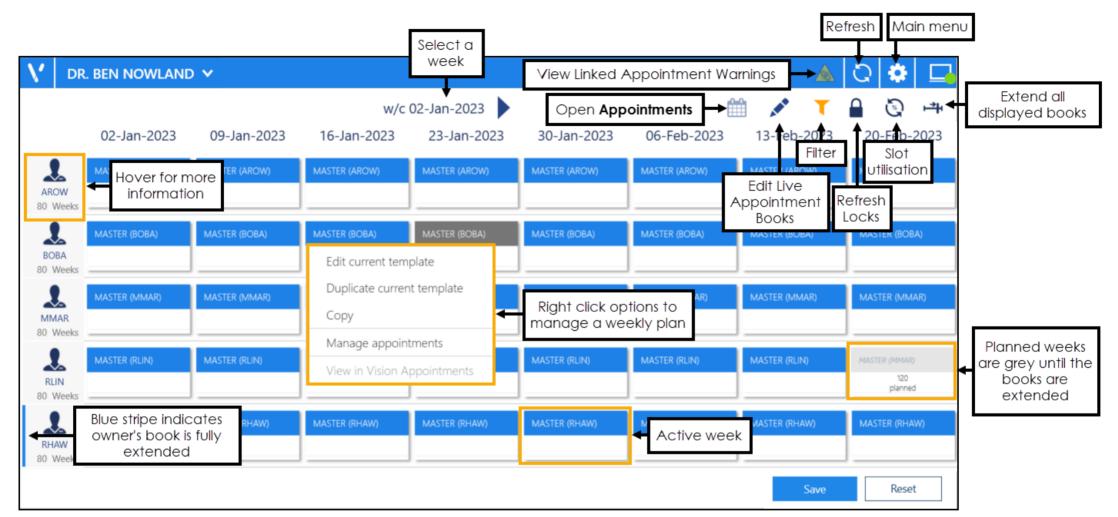
## **Appointments Setup Desk Aid - Scotland**







March 2024 v1.0

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The following are commonly used options from the **Appointments Setup** toolbar. Select an option to:

Main menu - Display the Appointments Setup menu.

Refresh data – Update changes made by other users.

Linked Appointment
Warnings - Indicates changes
are made to linked
appointments.

Edit Live Appointment Books - Manage the existing plans of a combination of book owners and dates.

Filter - Select and apply book owner filters.

Refresh Locks - Display any active locks.

Get counts - Show appointment slot usage, by owner, by week.

Extend all owners displayed - Extend all the books displayed.

## **Appointments Setup menu**

From the Main menu you can access all Appointments Setup functions:

Booking methods

Cancellation reasons

Book owners

- Staff
- Clinics

Extension plan

Override reasons

Owner extensions

Restrictions

Saved filters

Slot types

- Practice
- Restrictions

Session types

Sessions

Weekly plans

- Booking methods Add to and maintain a list of Booking methods to audit how your appointment slots are being booked.
- Cancellation reasons Add to and maintain a list of Cancellation reasons to audit why booked appointments are being cancelled. These are used by both practice and patients via online services.
- Book owners Staff and Clinics Book owners are the staff, usually clinicians and clinics, usually generic names, for example Asthma or Baby clinics, that appointment books are allocated to
- Extension plan (Home screen) Provides the tools to manage your appointment books.
- Override reasons Add to and maintain a list of Override reasons to record why you are booking an appointment in a slot with a Clinician restriction, or a Days/Hours Prior restriction.
- Owner extensions Allows you to allocate a default weekly template plan for each book owner and define the number of weeks that the books automatically extend by.
- Restrictions Add to and maintain a list of Slot type restrictions to prevent bookings being
  made for patients in specific slots. Restrictions can be defined by clinician, age and sex,
  for example, you could map a female only Slot type restriction to slots in a maternity
  session, to prevent bookings being made for male patients accidentally in those slots.
- Saved filters Add to and maintain a list of Saved filters to provide a quick way to view a selection of book owners and/or clinics.
- **Slot types** Add to and maintain a list of **Slot types**. **Slot type** is the name allocated to the type of appointment that should be booked into this slot, for example an Emergency appointment could be booked into an appointment with a **Slot type** of Emergency only.
- **Session types** Add to and maintain a list of **Session types** used to describe the purpose of an appointment session.
- **Sessions** Add to and maintain a list of **Sessions**. A session is a period of time that contains appointment slots. You must create and allocate a session to a clinician or clinic before you can book an appointment.
- Weekly plans Add to and maintain a list of Weekly plans. The weekly template plans for each book owner is used in the Extension plan view and becomes the released appointment books.

