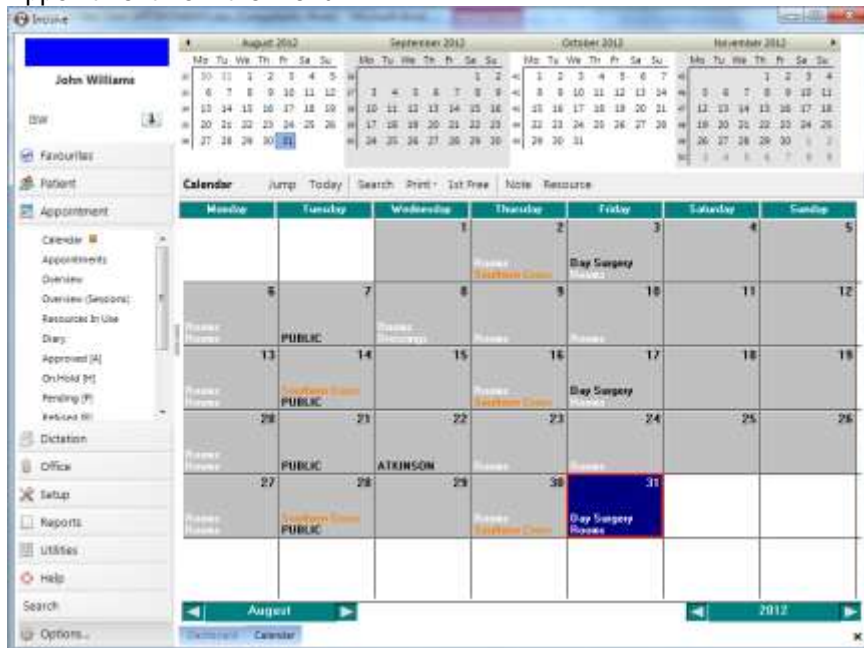## TUTORIAL: APPOINTMENTS

The Appointment Book is used to book patients into either consulting or operating sessions.
It can also be used for booking a patient with a nurse or technician, and waiting lists.
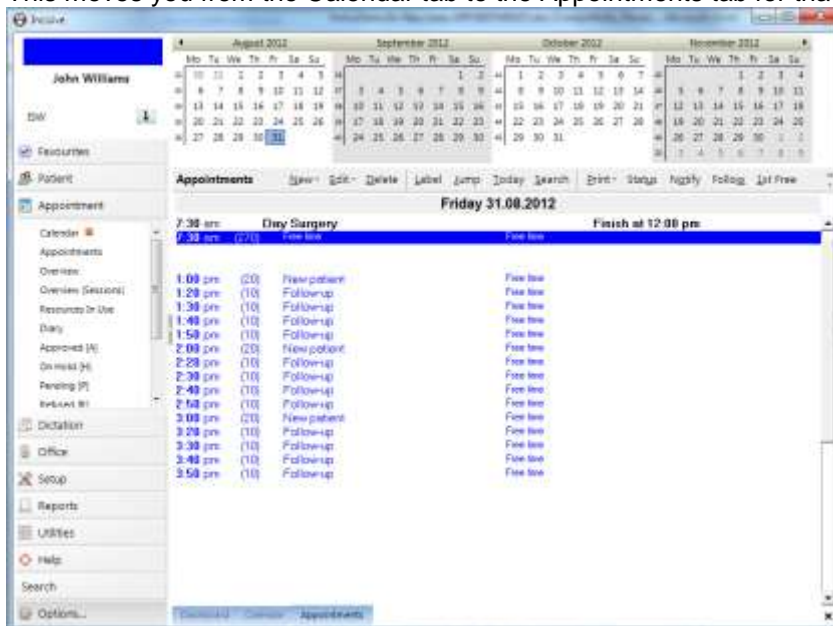
Navigating the Appointment Book
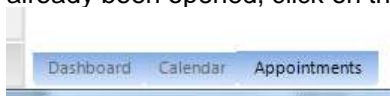
1. Appointment from the menu

    The monthly calendar will display.

2. Click on the day of the clinic.
   This moves you from the Calendar tab to the Appointments tab for that day.

3. Use the left-hand menu to go to other Appointment Book options or, if the option has already been opened, click on the tab at the bottom of the screen.
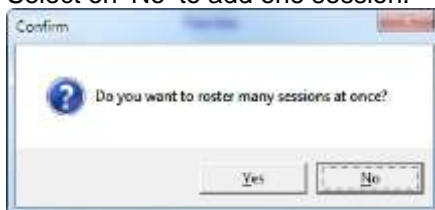
To add a new Session.

The best way to think of a session is as a container that holds the appointments. You cannot make appointments without a session.

4. To setup a new session to add appointments, click on New and select Session
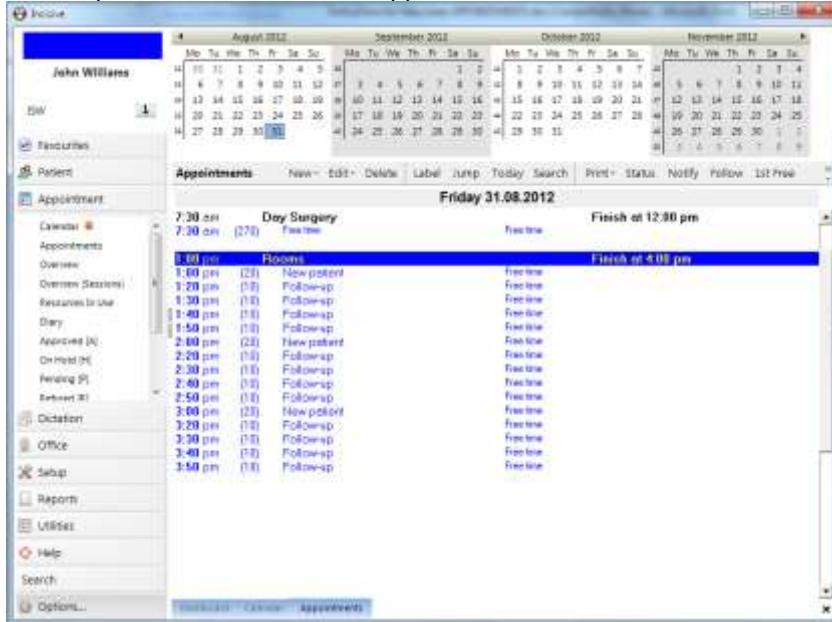
5. You can either roster multiple sessions, or add a 'one-off' session.
Select on 'No' to add one session.

6. On the next screen select the appropriate Session Type required, from the selection.
Enter the Start and Finish times and the Description and click OK.
If an operating session – you can add the usual anaesthetist.

This creates the appointments slots for you on the Appointments screen.

To make an appointment

The term 'appointment' is the same as 'booking'; and the method used is the same whether you are making a consultation appointment or a booking for theatre.

7. Ensure that the focus is on the appropriate free time slot for the appointment that you are making (i.e. 1.30 p.m.).
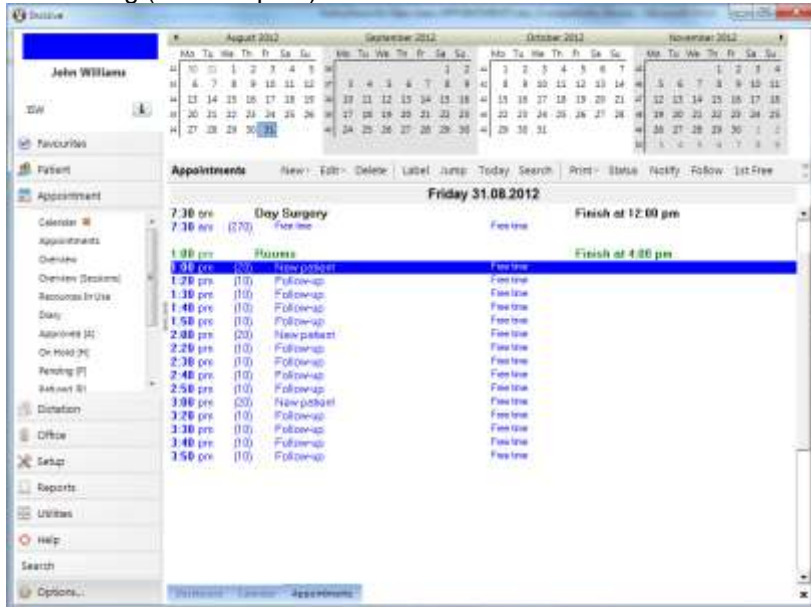
Remember that the time slots showing are really just lines on a page – you do not need to be restricted to booking the patient into the displayed time slot.

Nor do you need to match the appointment type with text in the time slot – it is just a guide.

8. Either:
   - Click on New and select Appointment, or;
   - Double-click on the empty slot

The Patient selection screen will display.

9. Type in the first few letters of the surname for the patient and press Enter or click on 'Search'.

10. Select the correct patient from the list. If the patient is not on the list either use the 'Find Patient' to additional search options, or use the 'New Patient' to add a new patient to the database.

11. Press Enter to Select the patient (or double click with the mouse).
The New Appointment – Patient Registration screen will display.

The focus should be on the Forward button. If the details are correct, press Enter (or F12).

12. Enter in the details of the appointment booking.

If the Appointment time is correct (taken from the start of the free time slot you originally selected) then press enter to accept the Appointment Time (or change as required). Either 24hr or 12hr format is accepted.

Select "Notify if earlier appt" if the patient requests to go on a notification list.

From the list of available Appointment Types select the one that you want.
Note you cannot add new appointment types here. That is done in Setup –
Appointments – Appointment Types.

Selecting the Appointment Type will enter the default number of minutes required for
this appointment type. If more or less time is required, change as appropriate.

If the default amount of time for the appointment is incorrect, then this can also be
changed via Setup – Appointments – Appointment Types.

Enter any further details about the appointment as necessary.


Select Forward (F12).

13. On the 'Select Referral' screen, ensure the correct referral is selected and that it has
not expired.

If you are adding a new patient you may also be prompted to add the referral details.

Select Forward (F12)

14. Then, if the default Billing Type for this patient requires a 'Claim number' (e.g. ACC or WorkCover), check that the right claim is selected and click on forward. This screen will not appear if 'Private' has been selected as the 'Billing Type' on the referral.
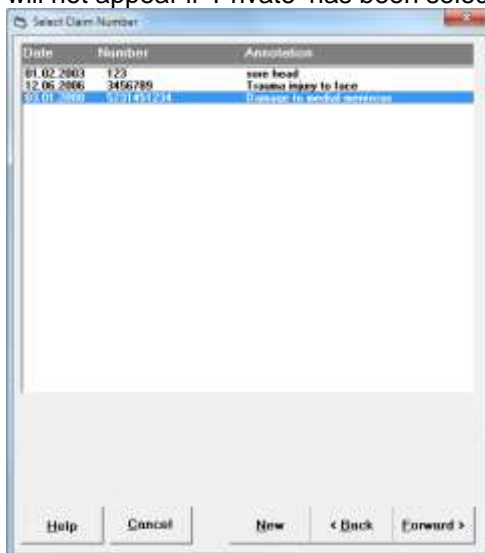
15. Finally, select OK on the last screen (Make Appointment).

Confirm the appointment details with the patient

If SMS (txt reminder) is enabled, confirm you want it sent

If the patient is at the reception and you are making a follow-up appointment, use the 'Label & OK' option to print a label with the appointment details on it and stick it to the back of the doctors card.

16. You will return to the Appointments tab and the patient will be listed.
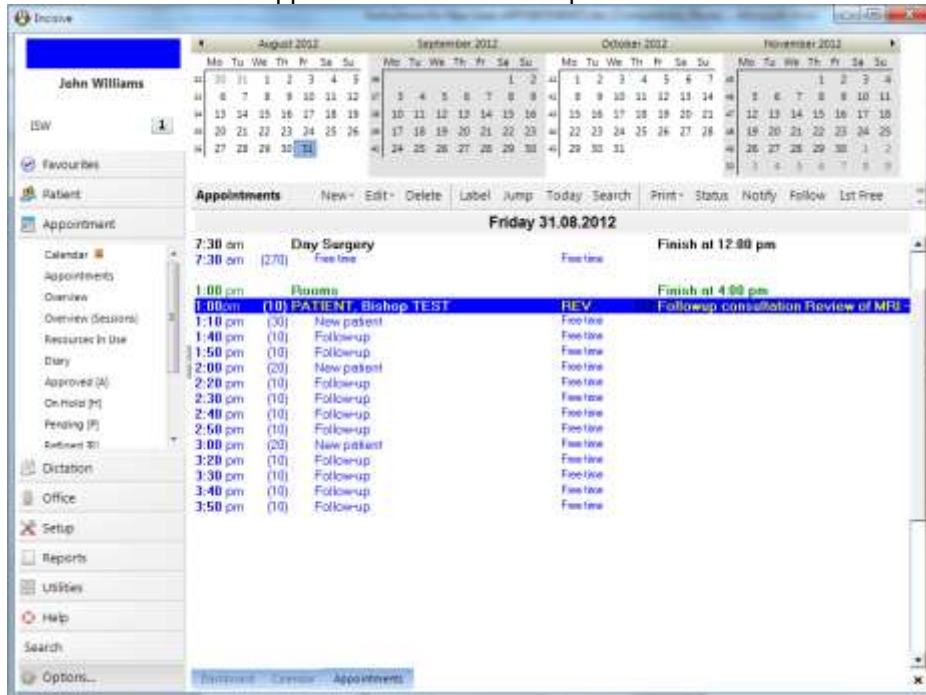
Advanced

Operation booking

When making a booking in an operating list, the only difference will be that there are more fields available to enter additional information about the operation.

Prompts

When making the booking there are a number of prompts that may appear requiring your attention.

Medical Warning

Alerts

Already on Waiting List
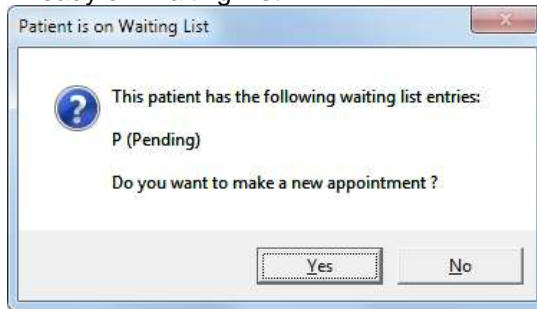
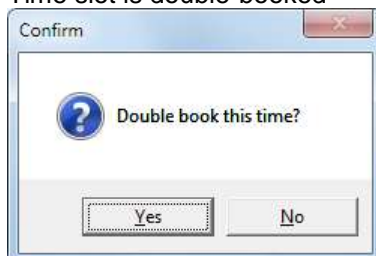## Already has an appointment booked

Has a Recall due
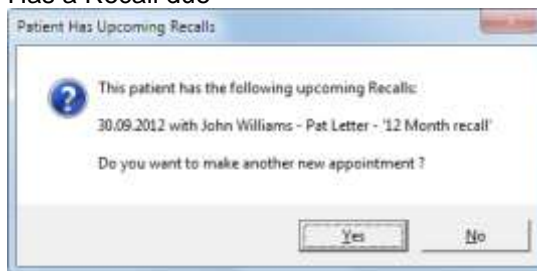
Referral Expiry
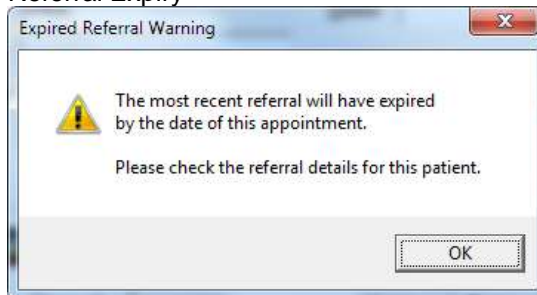
Time slot is double-booked

Double-booking a time

You are able to double (or more) book a time. A prompt will appear as a warning.
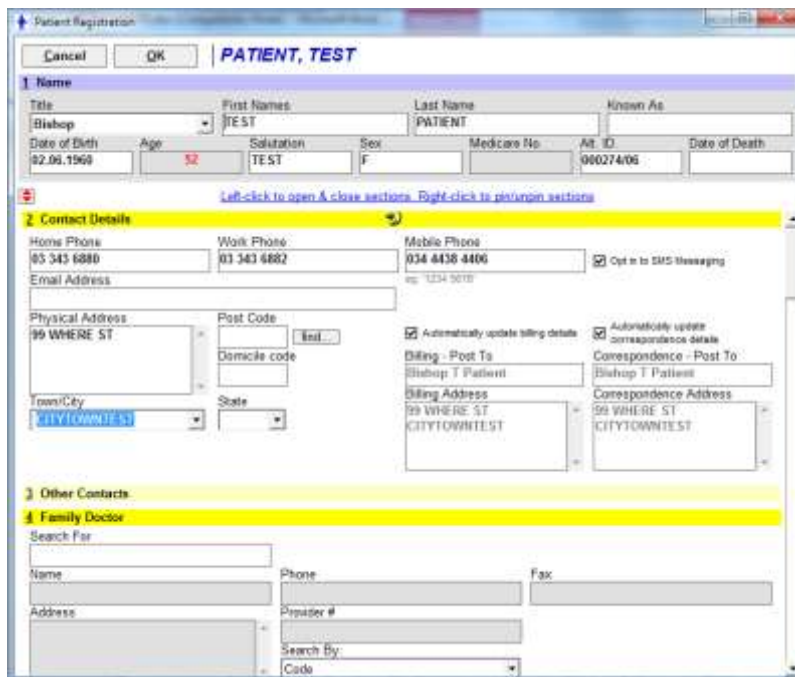The double-booked time will appear in RED

Checking & changing patient details

As you are making the appointment, when you have selected the patient a screen will appear with their basic demographic details, such as address, phone numbers etc.

If you want to add to or change their other details you can select the 'More' button which will forward you to the usual Patient Registration screen.

Look-up Patient records (F3)

To look-up the patient's Letters, Notes and other records held in the Patient module, highlight their name in the Appointment screen and press the F3 key or select the 'Patient Information' option in the Toolbar.

Quick Appointments

An option is available, when booking the patient, to skip the prompts for Referral and Claim information. This option is called 'Quick Appointments' and is turned on/off in *Setup → Appointments → Provider Settings*.

The purpose of this is to allow you to speed up the process of making an appointment, especially by telephone. You will be required to complete the referral details when the patient presents to reception.

This option should only be used if you are an advanced user of the SPM application, as there are significant consequences relating to making a booking for a patient who does not have a referral.