



# Follow up Appointments - Administration

2.7 New Feature Documentation

## What does it do?

The follow up appointment module has been introduced to encourage the booking of the next appointment after a Client visits the practice in order to retain their business.

## Activating Follow up Appointment Module

A selection of defaults has been added to the system with regards to the module.



You have 4 options of how you would like the system to operate:

Setting	Description
<b>Follow Up Appointment Disabled</b>	Module Disabled
<b>Follow Up Appointment Enabled and Enforced</b>	Module Enabled and Follow up prompt mandatory
<b>Follow Up Appointment Enabled and Selected</b>	Module Enabled and Workflow Active (Tick Box at top of prompt is ticked)
<b>Follow Up Appointment Enabled and Unselected</b>	Module Enabled and Workflow Inactive (Tick Box at top of prompt is unticked)

## Surgeon Availability

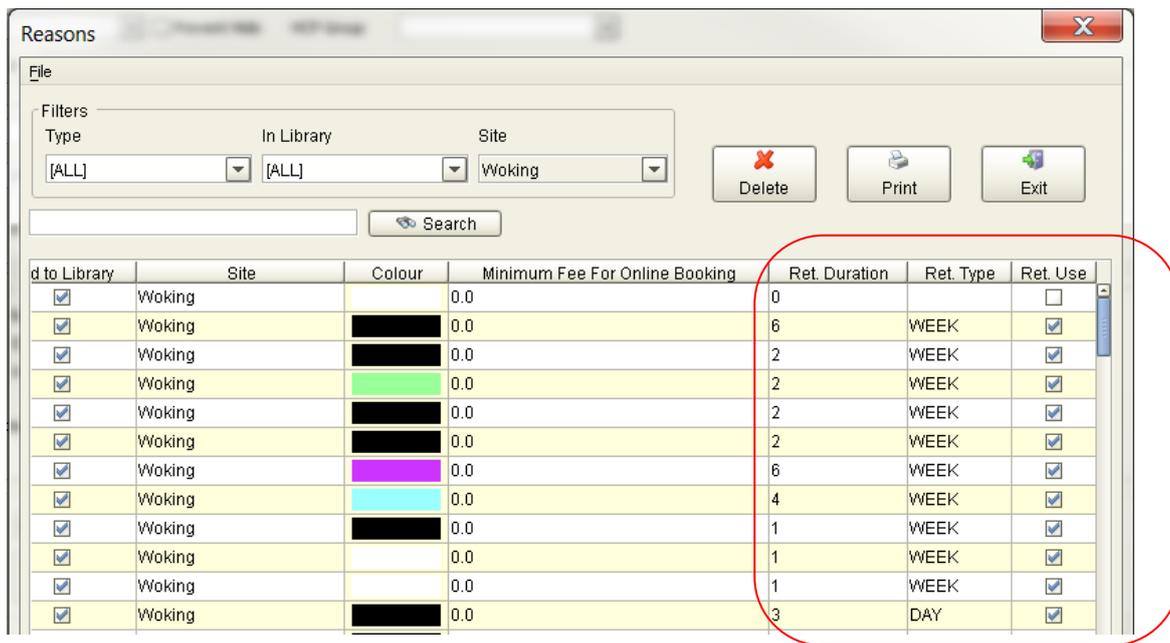
We recommend that setting up your Surgeons availability (Diary > Availability) as far in advance as possible in order to book the required future appointments.

# Appointment Reason Configuration

In Utilities > Libraries > Appointments > Reasons; you can set the recommended return duration for each appointment reason and enable its use within the follow up appointment prompt.

You can set the number of weeks/days using the 3 columns highlighted below:

Column Name	Description
<b>Ret. Duration</b>	Sets the date of the follow up appointment automatically from the current date.
<b>Ret. Type</b>	Number of Ret. Type column. Type of Duration (Weeks/Days)
<b>Ret. Use</b>	Calculates the date of the follow up appointment. Tick if to be used as a reason in the follow up appointment prompt.



Please note that Appointment Reasons are site specific therefore appointment reasons must be configured per site. Also, ensure default appointment lengths (i.e. 10 minutes) are configured as accurately as possible, as this also drives the default selected length for the Vet.

## Reporting

The following reports can be accessed via Marketing > Standard Reports:

Report	Description
<b>Successful Follow Up Appointments</b>	Breakdown of follow up appointments in date range where status is Arrived, Treated, or Paid.
<b>Unsuccessful Follow Up Appointments</b>	Breakdown of follow up appointments in date range where status is "not arrived", "failed to show", Cancelled or appointment was deleted.
<b>Turnover of Follow Up Appointments</b>	How Much Revenue was generated by follow up appointments
<b>HCP/Non-HCP Follow ups</b>	Number of follow up appointments split by HCP and Non-HCP patients and the status of the plan (Active, Suspended, Ended).