



Follow up Appointments

2.7 New Feature Documentation

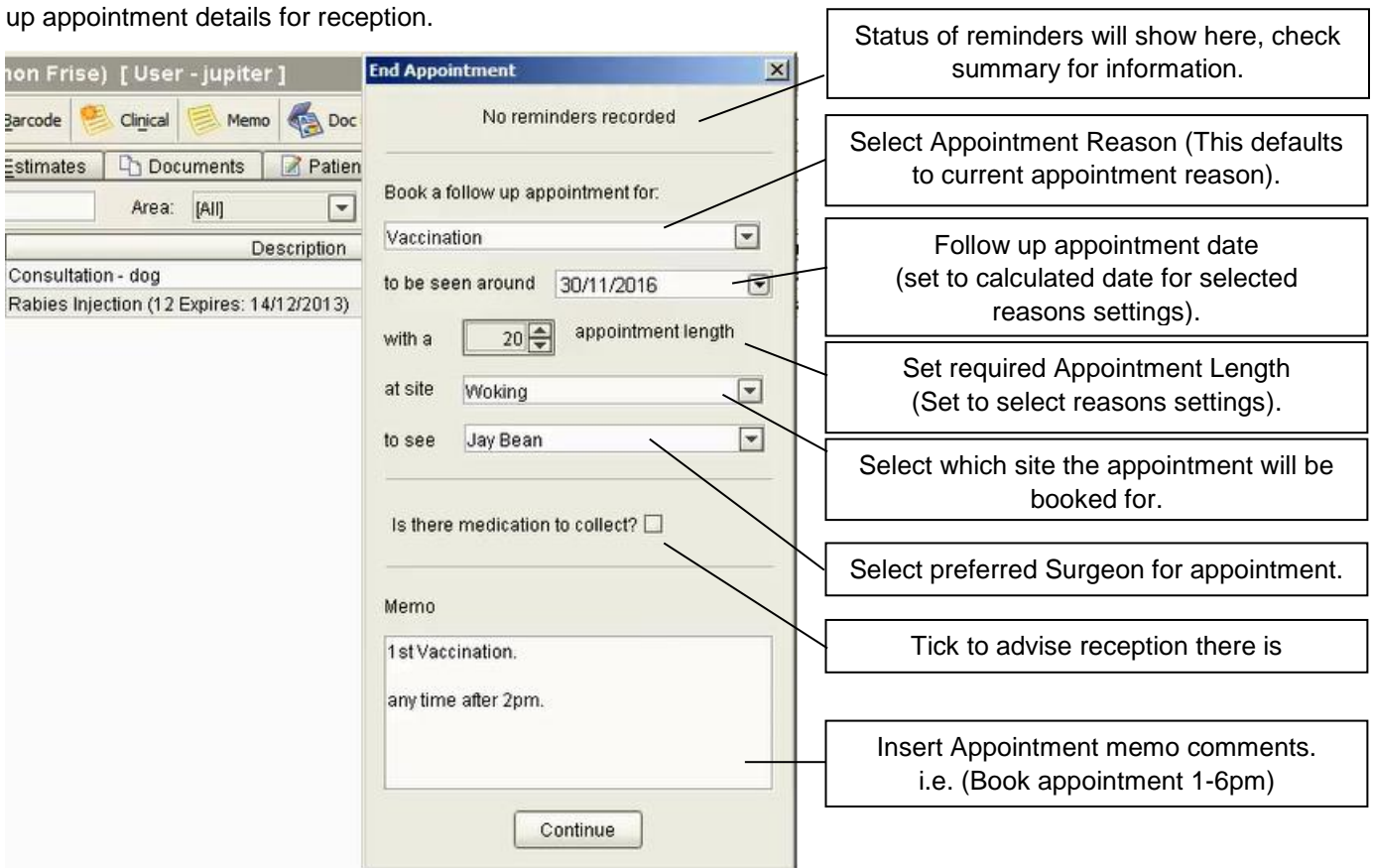
What does it do?

The follow up appointment module has been introduced to improve treatment workflow. It also encourages the booking of a next appointment after a client visits the practice to retain their business.

How Does it work?

Stage 1 - Treating a Patient

As normal the vet/nurse will select a patient from the waiting list and dispense treatments. When saving the treatments from draft (if enabled in defaults), you will see the below window. This windows provides required follow up appointment details for reception.



The 'End Appointment' dialog box contains the following fields and callouts:

- No reminders recorded**: Status of reminders will show here, check summary for information.
- Book a follow up appointment for:**: Select Appointment Reason (This defaults to current appointment reason).
- Vaccination**: Follow up appointment date (set to calculated date for selected reasons settings).
- to be seen around 30/11/2016**: Set required Appointment Length (Set to select reasons settings).
- with a 20 appointment length**: Select which site the appointment will be booked for.
- at site Woking**: Select preferred Surgeon for appointment.
- to see Jay Bean**: Tick to advise reception there is
- Is there medication to collect?** : Insert Appointment memo comments. i.e. (Book appointment 1-6pm)
- Memo**: 1st Vaccination. any time after 2pm.

Once above has been populated select 'Continue'. On Continue, items are saved to treatment history. A note regarding follow up appointment details is also added to the treatment history.

	Date	Time	Description	Qty	Total	Surgeon	Docket	Site	Ins No	Insurance
	09/11/2016	16:04	Consultation - dog	1.00	27.95	Jay Bean		Wok		<input type="checkbox"/>
		16:04	Rabies Injection (12 Expires: 14/12/2013)	1.00	12.92	Jay Bean		Wok		<input type="checkbox"/>
		16:05	Book Vaccination around 30/Nov/2016 to see Jay Bean for 20 minutes	0.00	0.00	Jay Bean		Wok		<input type="checkbox"/>

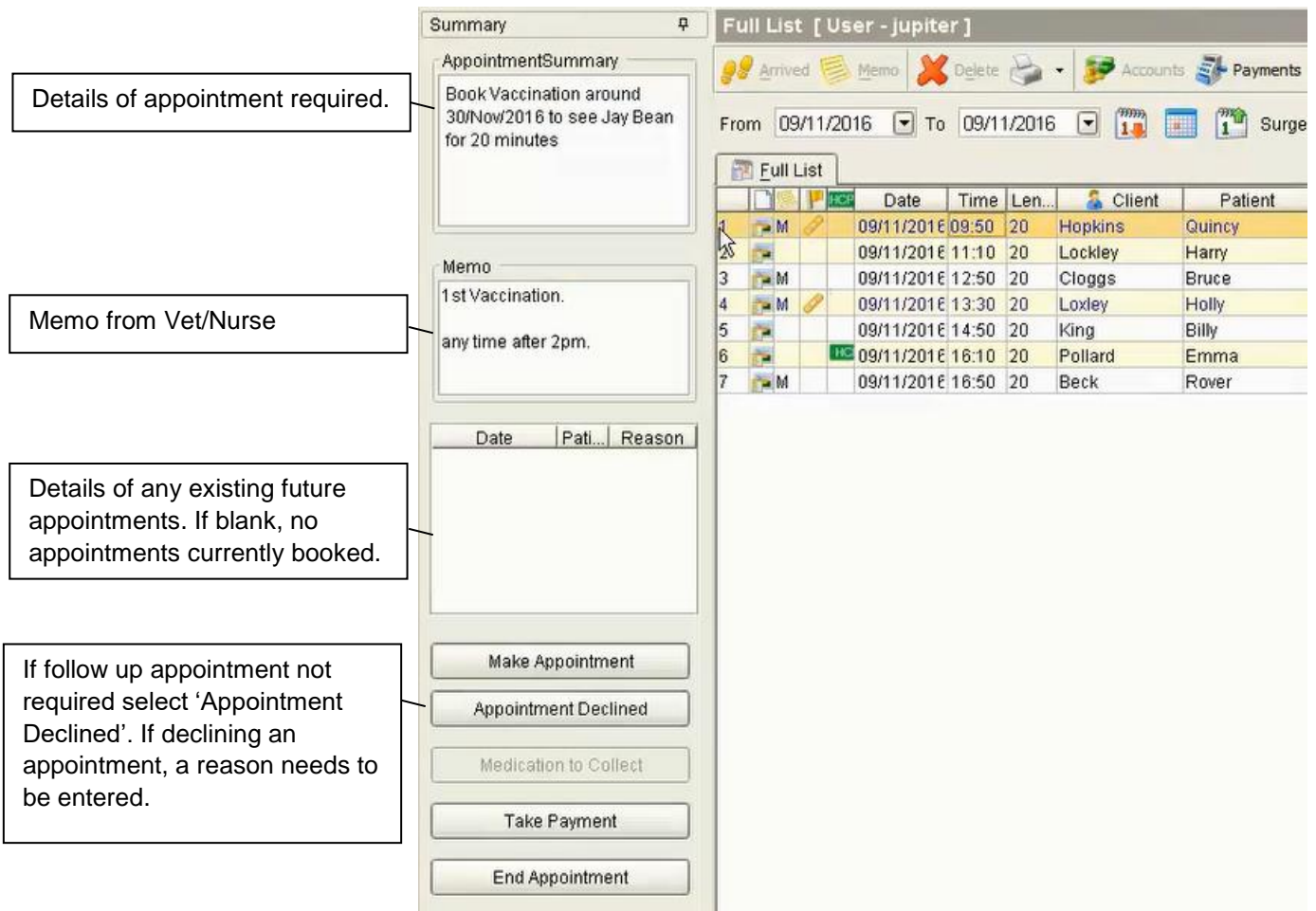
At this stage the Vet/Nurse has treated the patient, specified the follow up appointment requirements and can move onto treating their next patient on the waiting list.

Please note that the follow up appointment prompt will not appear if a patient has been euthanised.

Stage 2 – Viewing Appointment Summary

When selecting a treated patient from the day list (Treated List) you will be shown an Appointment Summary window containing follow up appointment requirements.

This Summary bar is used to End the Client's appointment.



The screenshot shows the 'AppointmentSummary' window with the following callouts:

- Details of appointment required.** Points to the 'AppointmentSummary' text area containing: "Book Vaccination around 30/Nov/2016 to see Jay Bean for 20 minutes".
- Memo from Vet/Nurse** Points to the 'Memo' text area containing: "1st Vaccination. any time after 2pm.".
- Details of any existing future appointments. If blank, no appointments currently booked.** Points to the empty table with columns 'Date', 'Pati...', and 'Reason'.
- If follow up appointment not required select 'Appointment Declined'. If declining an appointment, a reason needs to be entered.** Points to the 'Appointment Declined' button.

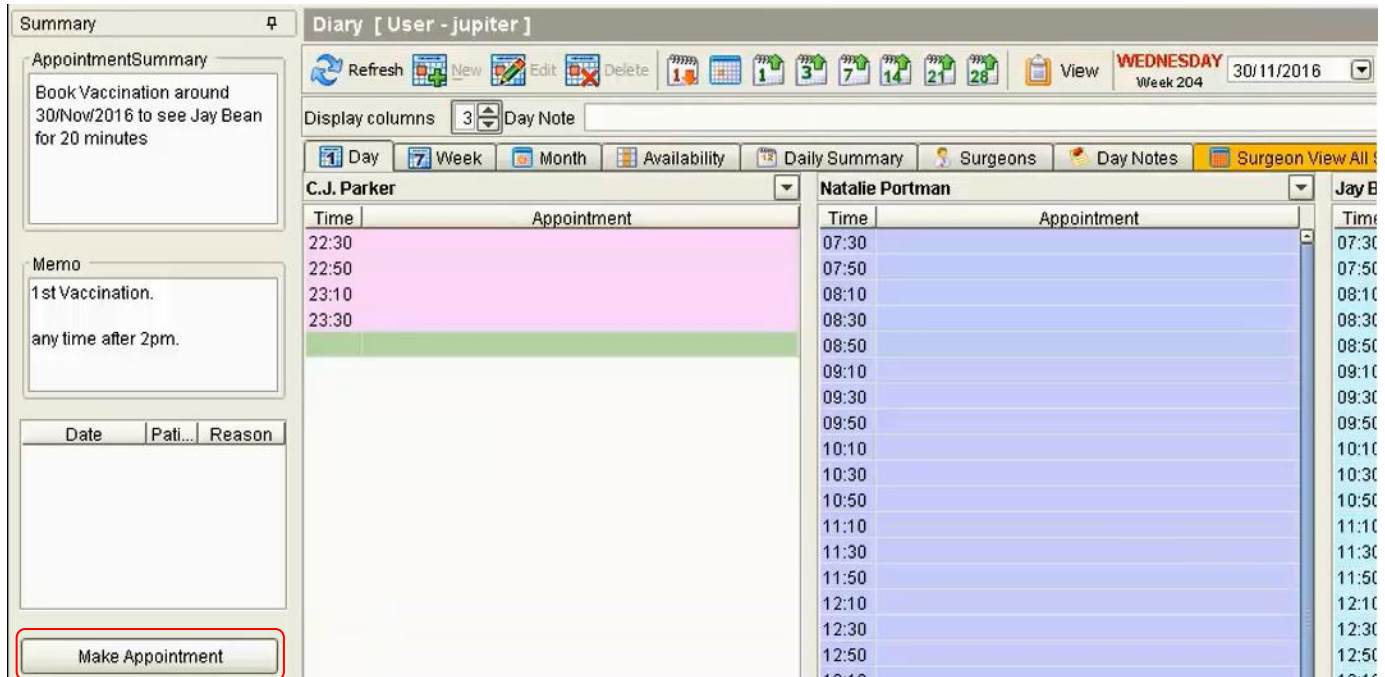
The 'Full List [User - jupiter]' window shows a table of appointments for 09/11/2016:

		Date	Time	Len...	Client	Patient
1	M	09/11/2016	09:50	20	Hopkins	Quincy
2		09/11/2016	11:10	20	Lockley	Harry
3	M	09/11/2016	12:50	20	Cloggs	Bruce
4	M	09/11/2016	13:30	20	Loxley	Holly
5		09/11/2016	14:50	20	King	Billy
6	ICP	09/11/2016	16:10	20	Pollard	Emma
7	M	09/11/2016	16:50	20	Beck	Rover

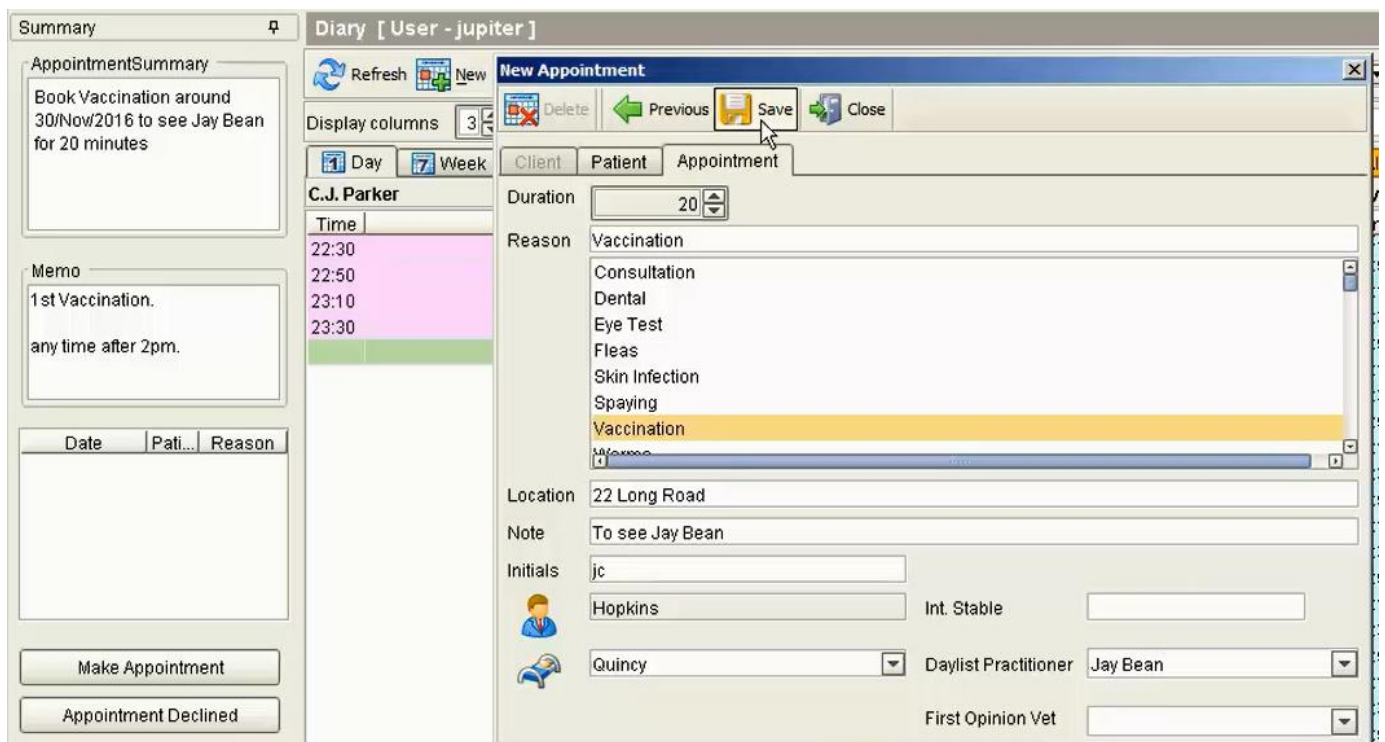
Buttons at the bottom of the Summary window include: Make Appointment, Appointment Declined, Medication to Collect, Take Payment, and End Appointment.

Stage 3 - Making an appointment

Select 'Make appointment' from the appointment summary bar. This will take you to the Diary screen for the required date set by the Vet/Nurse. Double Click a time slot to book appointment as normal.

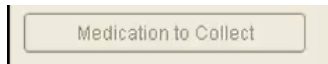


When booking the appointment, appointment details are pre-populated with required details. Insert initials and Save appointment.



Stage 4 - Medication collection

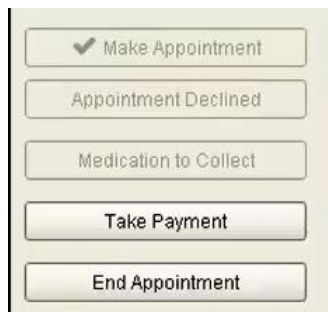
If no Medication to collect, the button will be inactive.



If Medication requires collection the 'Medication to Collect' button is active.

Selecting this option displays a prompt with all treatments ready to be collected by the client

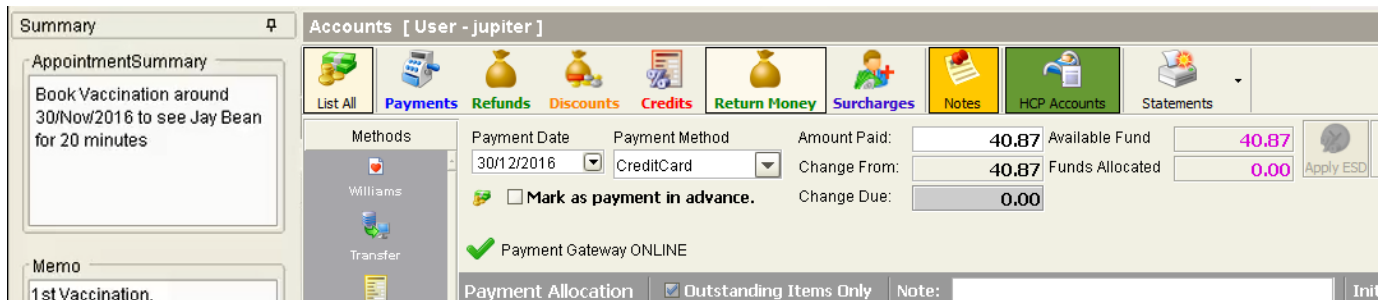
Stage 5 – Taking a payment



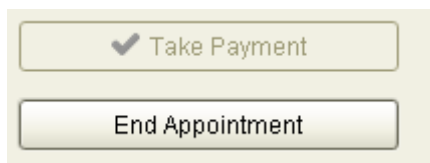
Once the appointment has been booked, the summary bar provides you with 2 remaining options.

'Take Payment' and 'End Appointment'. To take the payment select 'Take Payment'.

When the user selects the 'Take Payment' button, the Accounts payment screen will display. Take the payment as normal.

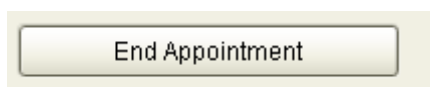


Once the payment has been saved, the take payment option becomes inactive with a tick displayed.



Stage 6 - Ending an Appointment

Once the appointment has been made and the client has paid, the user can end the appointment by clicking the 'End Appointment' button.



Once selected the Appointment Summary side bar will close and selecting the patient from the Full List/Treated list will no longer display the appointment summary bar.

