Book an Appointment

04/11/2024 4:10 pm GMT

Summary

Appointments can be booked from from three areas of the system: The Reception Screen, Diary and Treatment Screen.

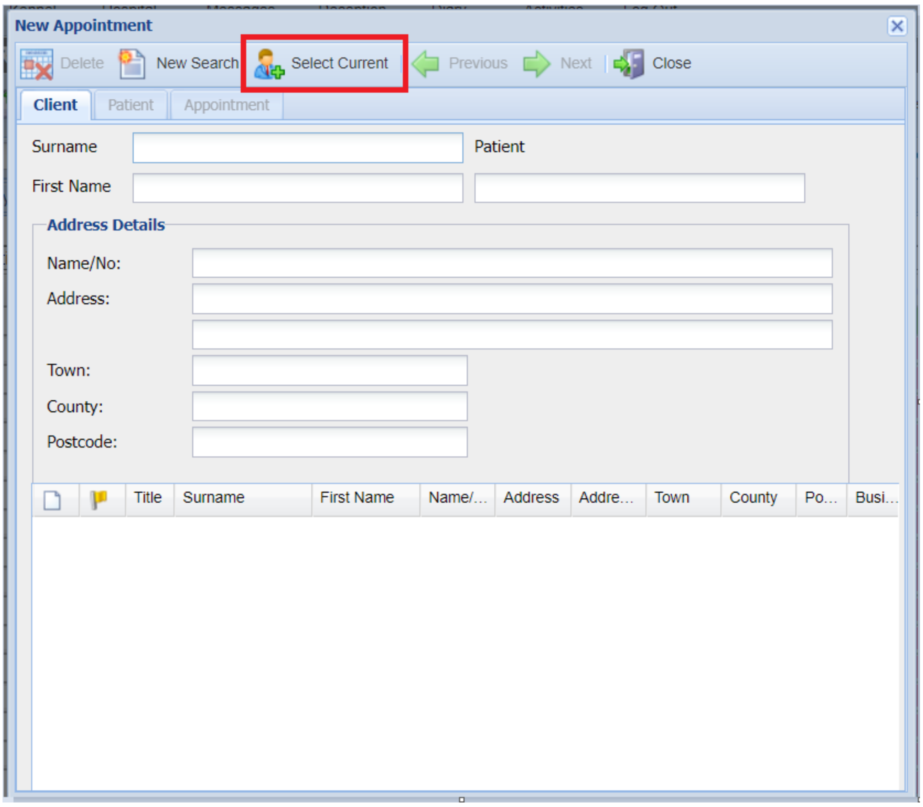
Details

New Appointment Screen

When booking an appointment, the 'New Appointment' window will display.

When using the "New Appointment" window an option is available to use the Current Client details by clicking 'Select Current'. If selected the current client and patient will autofill the new appointment screen.

Alternatively, the user can search for a new client by typing in the client details and Merlin will begin to search for the client and list them at the bottom of the window.



The following details can be captured when booking an appointment:

Duration

The length of the appointment.

Reason

The appointment reason (free-text or selected from a pre-defined list).

Location

Location of the Patient, this is pre-populated with the patient's address.

Note

A field to record any notes related to the appointment (i.e. Symptoms).

Initials

The user's initials.

Client

The Client's Surname (for reference).

Patient

The Patient's name (for reference). This can be changed to another one of the Client's patients via a drop-down list.

Next Reminder Date

Shows the next reminder date

Referral Practice

Used to capture the practice the Patient has been referred from. This is pre-populated with if registered.

Int. Stable

A field to record which stable/kennel an animal is stored in.

Daylist Practitioner

Displays the Surgeon the Patient is booked to see (pre-populated with diary column's surgeon).

Used to capture the referring vet. This is pre-populated if registered.

Once the appointment information has been entered, the user is able to finalise by clicking 'Save'. There is also the option to click 'Save & Book Next' to create another appointment for the same client and patient. When selecting the next appointment slot it will pre-define the client and patient details from the user previously input.

Appointments can be booked in multiple ways (as detailed below).

From Reception

1. Search for the **Client** and **Patient** in **Reception** (e.g. by client surname, address, patient name).
2. With the Patient selected, select the **'Make Appt'** button.
3. Double-click a **time slot**.
4. Enter the appointment **reason**, **notes** and **initials**.
5. Select **Save**.

From Treatment Screen

1. Enter a **Patient's** Treatment History Screen.
2. Select the **'Make Appt'** button.
3. Double-click a **time slot**.
4. Enter the appointment **reason**, **notes** and **initials**.
5. Select **Save**.

From the Diary

Option 1

1. Double-click a **time slot**.
2. Search for the **Client**
3. Select the **Patient**
4. Enter the appointment **reason**, **notes** and **initials**.
5. Select **Save**.

Option 2

1. Click on time slot and click **New**
2. Search for the **Client** or click **Select Current**
3. Select the **Patient**
4. Enter the appointment **Reason, Notes** and **Initials**

5. Select **Save**

Booking appointment for another site

To book an appointment for another site, select the desired site from the 'Site' drop-down list in the top right corner of the Diary.

This list will display any sites the logged in user has access to.