Appointment Library

04/11/2024 3:53 pm GMT

Summary

This page documents the libraries available under the Appointments library.

For information on how to update/sort libraries, see: How to use

Details

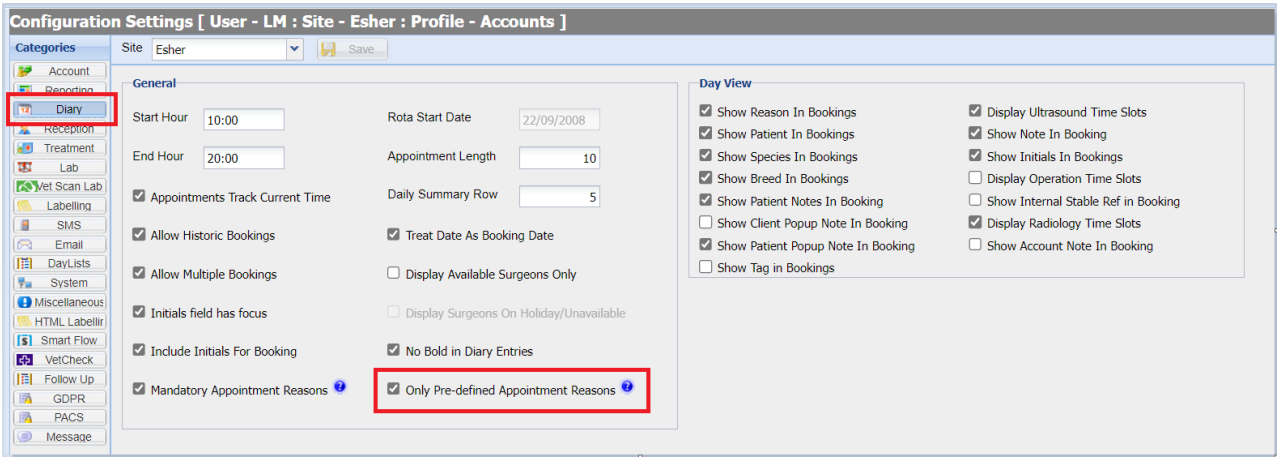
Appointment Reasons

When you make an appointment in Merlin, you are able to specify a reason for the appointment. Within the Setting>Reception screen you are able to enable a setting to stop users free typing appointments.

To enable predefined appointment reasons, you will first need to set them up for your practice.

NOTE: Setting the feature before creating the reasons will prevent you from creating any appointments.

Users can then turn on the predefined appointment reasons by following the path Administration/Settings/Diary/Only Pre-defined Appointment Reasons.



There are some other interactions to be aware of:

- Mandatory Appointment Reasons has been added to the administration settings. Predefined and Mandatory settings interact with each other.
- If **'Mandatory Appointment Reasons'** is OFF and **'Only Pre-defined Appointment Reasons'** is ON, the user can provide a predefined reason or no reason.
- If both are ON, then the user must provide a predefined reason.

There are three types of appointment reasons: Appointment Reasons, Hospital Reasons and Declined Reasons.

Appointment Reasons: Display when booking a standard appointment.

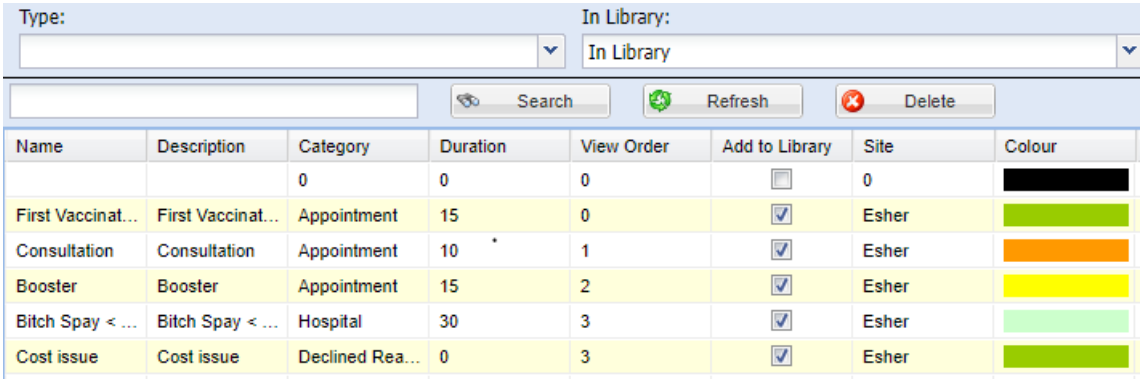
Hospital Reasons: Only display when booking a hospital appointment.

Declined Reasons: Used as part of the Follow Up Appointment module to record declined appointment reasons.

When an appointment is made in a **Hospital Column**, the Hospital Reasons are used, for all other appointments, the standard Appointment Reasons are used.

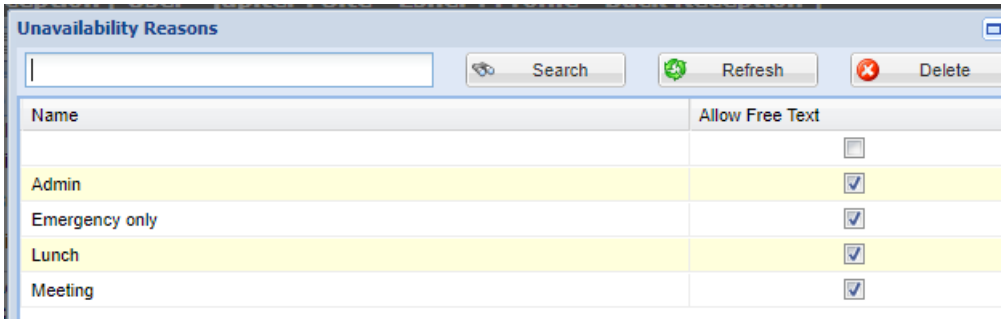
Appointment Durations: It is possible to set the duration of your appointment reasons. If used it is advisable to have your diary slots set at 5 minute intervals so varying appointment durations can be booked in. **Note: Appointment Durations are required when using** MWI Pet**.**

As shown in the example below it is possible to use different colours to identify different appointment types.



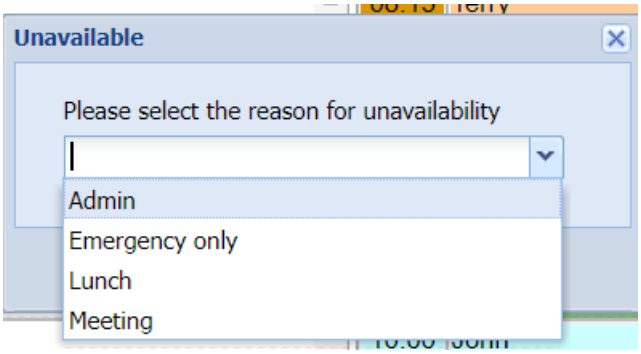
Name	Description	Category	Duration	View Order	Add to Library	Site	Colour
		0	0	0	☐	0	
First Vaccinat...	First Vaccinat...	Appointment	15	0	☑	Esher	
Consultation	Consultation	Appointment	10	1	☑	Esher	
Booster	Booster	Appointment	15	2	☑	Esher	
Bitch Spay < ...	Bitch Spay < ...	Hospital	30	3	☑	Esher	
Cost issue	Cost issue	Declined Rea...	0	3	☑	Esher	

Unavailability options: It is possible to create Unavailability reasons to use when marking a slot as unavailable in the diary.



Name	Allow Free Text
	☐
Admin	☑
Emergency only	☑
Lunch	☑
Meeting	☑

To access the reason right click, select unavailable and select from the options as shown in the examples above.


Unavailable
Please select the reason for unavailability
Admin
Emergency only
Lunch
Meeting