

IES Appointments: Opening a New Appointment Book

## IES Appointments: Opening a new Appointment Book

### Purpose

The purpose of this Document is to explain how to open a new Appointment Book.

### Introduction

Appointment Books are connected to specific Application Modules in IES where they apply, for example the Medical Practice. Here we show entry to the function to create a new Appointment Book, from the Medical Practice main wizard.

Hint: You can only create a new Appointment Book if you have access to this function (see the related User Access manuals).




Above, we show how, when you choose "Appointments", a list of options appear, among which an option to "Open New Appointment Book".

When you open a new Book, the system will automatically give it a Number, and you give it a Name, i.e. one that describes what it is for.

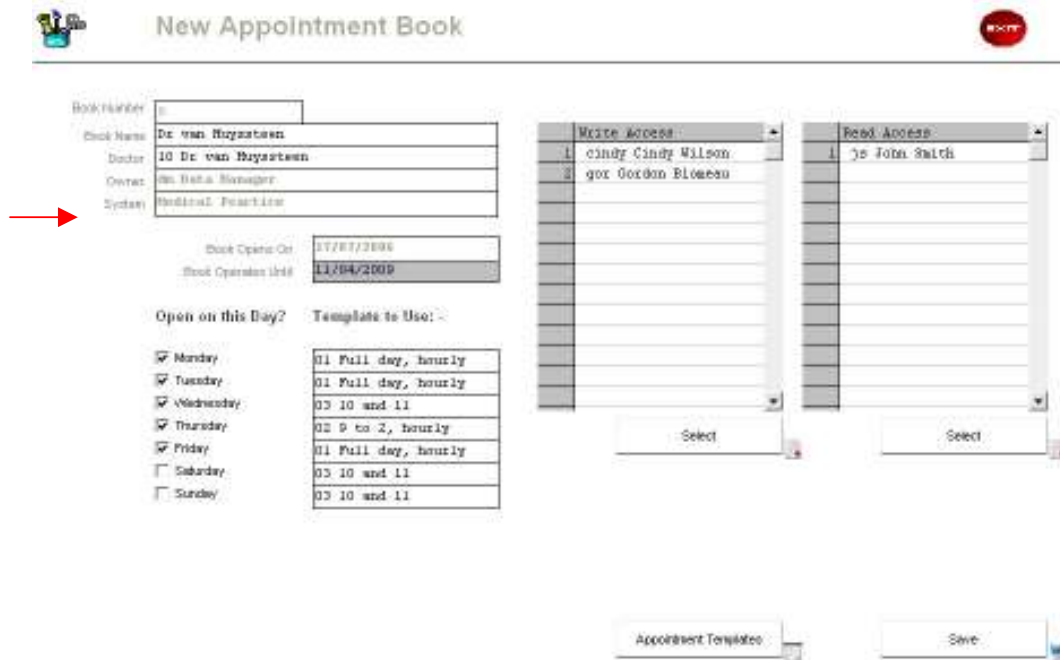
In the case of a Doctor's appointment book, as in the example below, you can also 'connect' the Book to a specific Doctor (which must be already defined on the Doctor's list, or otherwise you can come back later and do maintenance on the Book and specify this Doctor). Connection to a specific Doctor is recommended only when that Doctor is the sole Doctor to be seen on appointments from this Book, in which case it is not necessary to select the Doctor each time a Consultation record is opened (i.e. from the Appointment). If the same Book is used for more than 1 Doctor, then it is better not to specify a specific Doctor here, and rather select the Doctor when opening the Consultation record.

Hint: You can use 1 Book per Doctor, or manage appointments for multiple Doctors on 1 Book.

When a new Appointment Book is opened from the Medical wizard, the it is automatically a Medical Appointment Book, as can be seen below.

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**New Appointment Book**

Book Number:

Book Name:

Doctor:

Owner:

System:

Book Opens On:

Book Operates Until:

Open on this Day?  Monday  Tuesday  Wednesday  Thursday  Friday  Saturday  Sunday

Template to Use:

01 Full day, hourly
01 Full day, hourly
03 10 and 11
02 9 to 2, hourly
01 Full day, hourly
03 10 and 11
03 10 and 11

Write Access:

1	cindy Cindy Wilson
2	gor Gordon Blomster

Read Access:

1	js John Smith
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Appointment Templates


The system will automatically assign ownership of the Book to the current User. The Owner is the only person who can remove the Book, but ownership changes are provided for on the Maintenance screen (not the 'new book' screen).

Also, the system automatically opens a new book from 'today' for 1000 days. The Book can be extended at any time from the Maintenance option by extending the 'Book Operates Until' date.

Then you need to check for each day of the week whether this Book takes appointments for that day of the week. For example, if the resource (in this case the Doctor), will only see Patients between Monday and Friday, then check only those days, and the other days of the week are automatically blocked out.


However, you have to choose an Appointment Template for each day of the week, even ones not normally used, because in certain circumstances you may 'open' an otherwise blocked day, and then the system needs to know which Appointment Template to apply. (Note: There is a direct link to Appointment Templates from this screen, in case you need to define or re-define some templates. The Templates, how to do them, and how they work, are described in a separate User Manual.)

Finally, before choosing SAVE to create the new Book, you may also select other Users whom you, as owner, allow to WRITE or READ this Book. You may also do this later or at any other time from the Maintenance option, but essentially Users that you provide with WRITES access may make, move and cancel Appointments, whereas User that you allow to READ only, may only view appointments, but cannot make any updates or changes.

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