

IES Appointments: Maintaining Appointments

Purpose

The purpose of this Document is to explain how to maintain appointments.

Introduction

Once an appointment exists, various things can happen, i.e. the Patient may call to cancel or change the appointment to a different date or time, or the Doctor may become unavailable or for some reason appointments may have to be re-scheduled. In this Document, we work through some of these examples.

To maintain appointments, we start with the Appointment Date (if the Patient or Customer has forgotten the Date, then this may be established by calling up the Patient or Customer Record, enter the CRM Events, and find it from there). Therefore, we open the appointment book, and if necessary, we move the view to the relevant date by using the 'Choose Entry Date' and / or arrow functions to move forward or backwards. In the 1st instance, we 'show' the correct Appointment Book.



Appointment Book: Dr Rossouw

Choose Entry Date

2006 JUL 17 MON	2006 JUL 18 TUE	2006 JUL 19 WED	2006 JUL 20 THU	2006 JUL 21 FRI	2006 JUL 22 SAT	2006 JUL 23 SUN	2006 JUL 24 MON	2006 JUL 25 TUE	2006 JUL 26 WED	2006 JUL 27 THU	2006 JUL 28 FRI	2006 JUL 29 SAT	2006 JUL 30 SUN
100%	33%	100+	50%	100%			67%	50%	25%	50%	50%		

2006 JUL 31 MON	2006 AUG 1 TUE	2006 AUG 2 WED	2006 AUG 3 THU	2006 AUG 4 FRI	2006 AUG 5 SAT	2006 AUG 6 SUN	2006 AUG 7 MON	2006 AUG 8 TUE	2006 AUG 9 WED	2006 AUG 10 THU	2006 AUG 11 FRI	2006 AUG 12 SAT	2006 AUG 13 SUN
0%	0%	0%	0%	0%			0%	17%	0%	0%	0%		

Have you used your IES today?

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To enter any Date currently shown (even if blocked out!) you just click the image below the date. Now we enter the date of 8 Aug 2006 in Dr Rossouw's Appointment Book, by clicking on the 'open page' image. Our purpose is to work with Miss Botes' appointment.



Appointment Book: Dr Rossouw

2006	2006	2006	2006	2006	2006	2006
AUG						
5	6	7	8	9	10	11
SAT	SUN	MON	TUE	WED	THU	FRI

>>>	Time	Booking
1	07:00	
2	08:00	
3	09:00	Miss Lou Hannah 01 333 5463
4	10:00	
5	11:00	
6	12:00	Mr Smith John 043 552 2345
7	13:00	
8	14:00	Miss Botes Linda 063 276 7766
9	15:00	



To open Miss Botes' appointment, we simply dbl-click on it.

Appointment Details 

On Demand Appointment Actions:

On Demand Drills:

Book: Dr. Rossouw
 Date: 08/08/2006
 Time: 14:00
 CRM #: 00470: 01 Botes Linda
 Patient #: 01: 01 Botes Linda
 Account #: 01: 01 Botes L...
 Consultation #:

The Consultation can be opened or entered from here (usually on appointment day)

System Log: ***** 17/07/06 13:54
Created by DATA MANAGER..

Patient: 01 Botes Linda
 CONTACT (TEL): 063 276 7766
 Notes: 063 276 7766

On the Appointment screen, we have a number of options. We can 'drill into' the Patient Record, the Account Holder, the CRM Master and the CRM Events.

We can also MOVE the appointment to a different Date or Time Slot, we can CANCEL it, or flag it as a NO SHOW (i.e. on the date of the appointment if the Patient does not turn up but did not cancel before the time either).

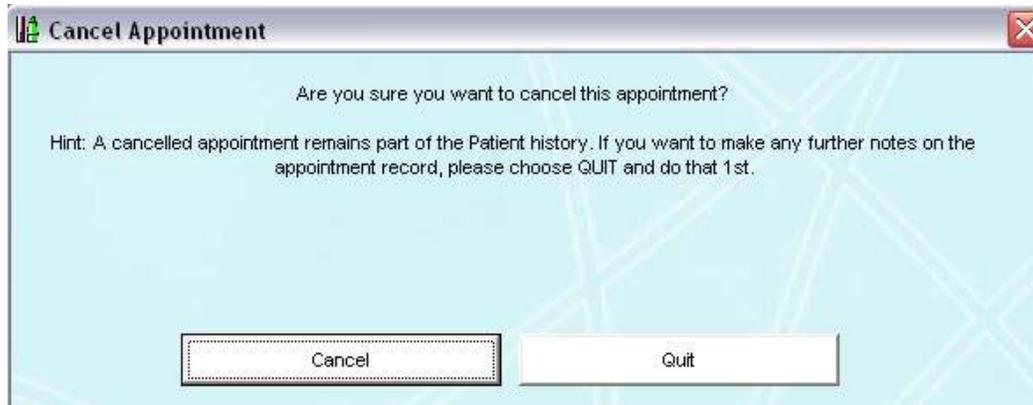
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At the bottom left we see a 'system log' where the system audits all events that take place in connection with this Appointment, i.e. date change, cancellation, etc.

The drills into master records are straight forward and require no further explanation.

The CANCEL function does the following: -

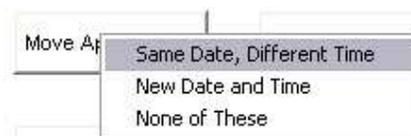


NO SHOW may yield this -



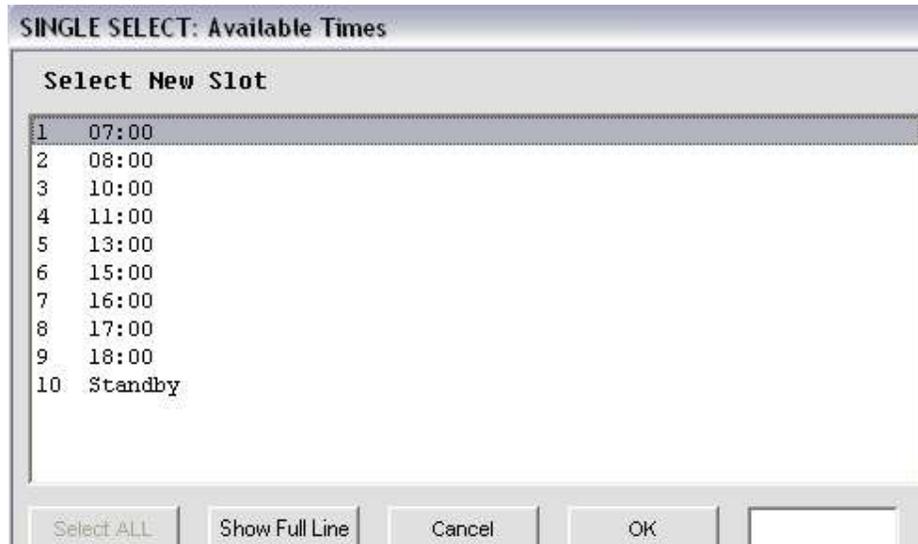
i.e. if you try to do it in advance. Once the Appointment date / time has come and gone, of course you can do it.

MOVE APPOINTMENT can be done for the same Date, to a different time slot, or the appointment can be moved to a different date.

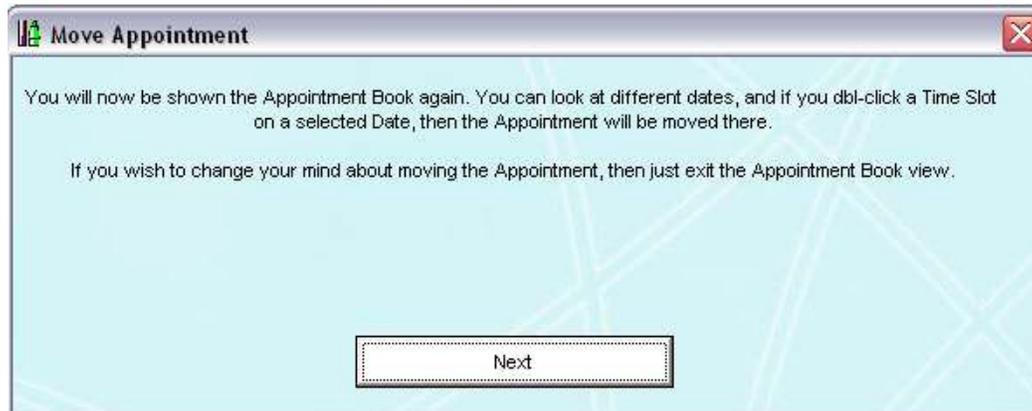


1st we demonstrate how the Appointment is moved to a different time for the same date. Basically the system offers the available time slots on this date, plus a Standby option, and we just select the new time slot for the change to take place.

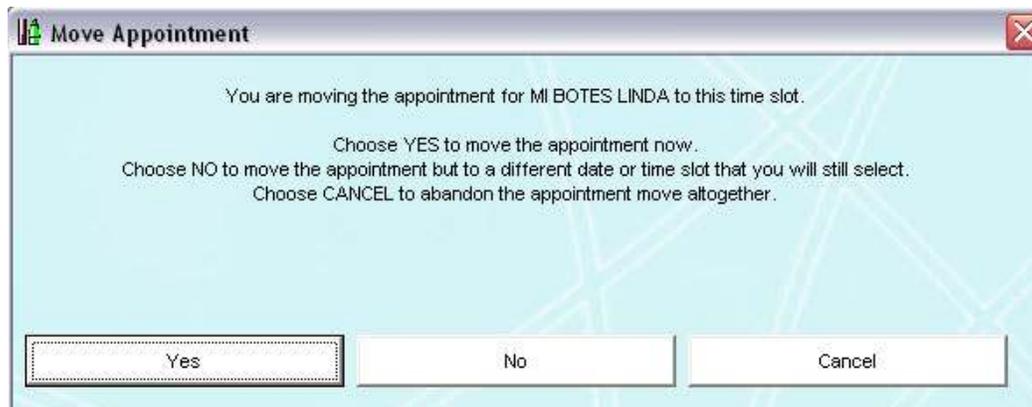
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To move the appointment to a new date, choose 'New Date and Time' .



The system advises that it will show the Appointment Book again, and when we enter a new Date, then dbl-click a time slot, then the appointment will be moved there. The system will ask for our confirmation, as follows -



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In this example of how to manage Appointments, we have used a Medical Appointment Book, and in this case, there is another option, i.e. 'Enter Consultation'. This option is described separately in the Manual called 'Appointment Consultation Link'.

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