IES Appointments: Medical Consultation Link

Purpose

The purpose of this Document is to explain the function of the Consultation link on Medical Appointment Books.

Introduction

Consultation records may be opened without the Appointment Book as such, but when the Appointment Book is used anyway, it is much simpler to enter the Consultation record (which also leads to the Consultation Invoice) directly from the Appointment.

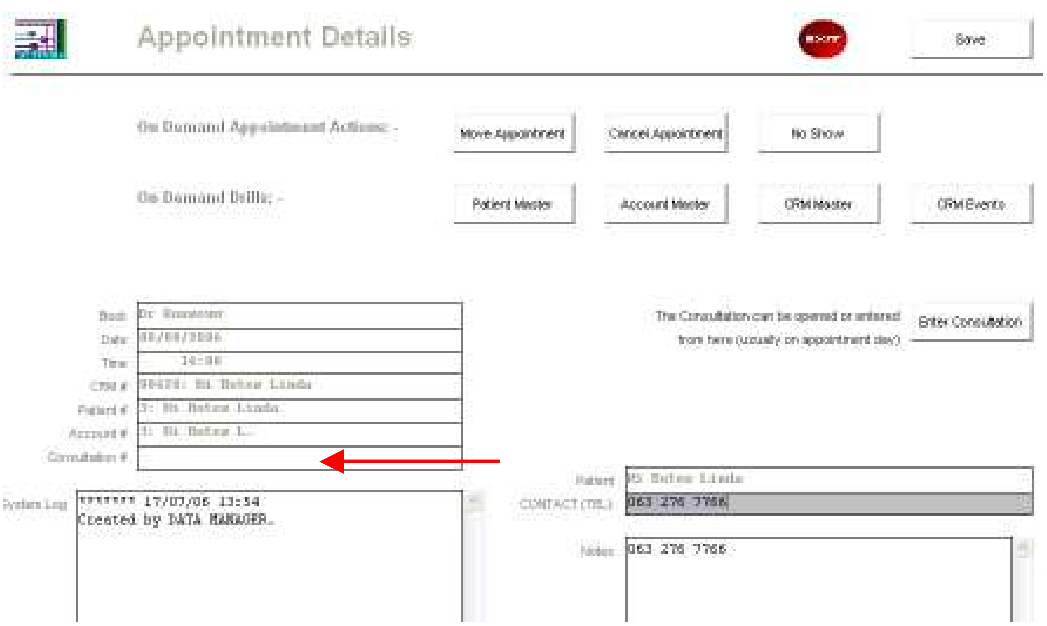
Appointment → Consultation → Invoice

Consultation Requirements

Any consultation in the Medical system has a Consultation record, which is always linked to a Patient record, and which in turn is always linked to a CRM (Customer Relationship Management) and Account record.

Automatic Linking from Appointment

The Appointment, once it exists and is entered again, has a 'Enter Consultation' function. If the Consultation link is not yet present, it is established by the system, and once it is present, then the Consultation may be entered seamlessly from the Appointment.

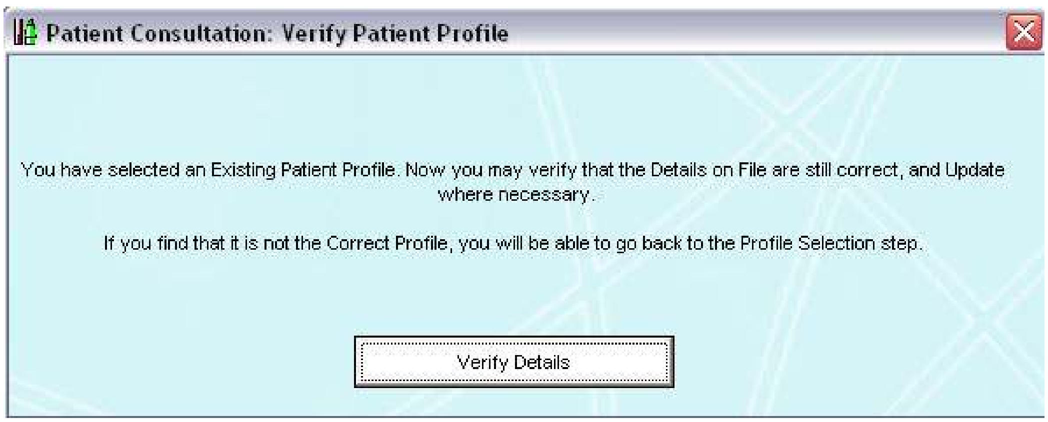


The appointment shown above certainly displays links for CRM, Patient and Account, but not yet for Consultation. When the 'Enter Consultation' function is used, 1 of 2 things will happen: -

- For a new Patient, the system will force a new Patient record to be established (which will automatically result in a CRM record being created by the system), and association of the Patient record with an Account record. An Account record can be shared by multiple Patients in certain situations, for example a family where the Account is in the name of a Parent, but each Child Patient has a separate Patient record, yet are connected to the same Account record.

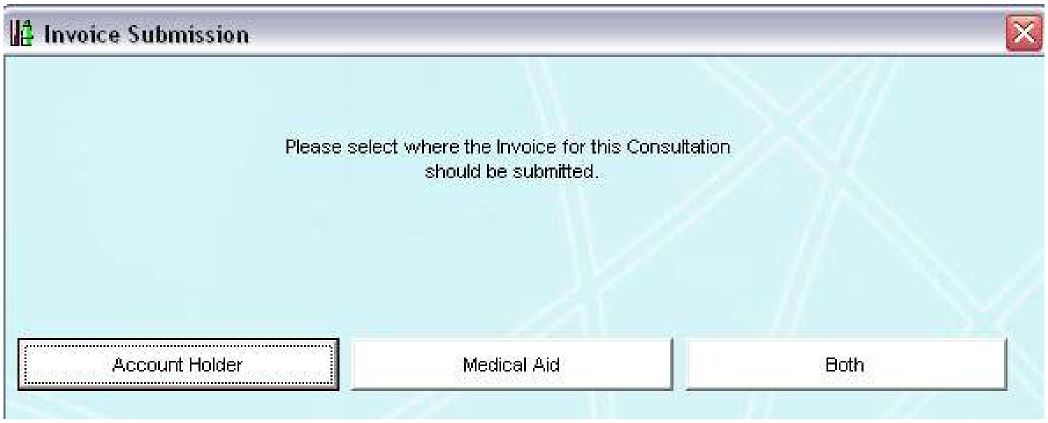
- For an existing Patient, the system will ask us to verify the Patient and Account record details, i.e. in case there has been changes in address, telephone, Medical Aid, or other.

We will demonstrate the sequence 1st for an existing Patient: -



After this, the Patient record is shown, and if there are no changes we can simply choose SAVE or EXIT, and confirm that it is the correct Patient record.

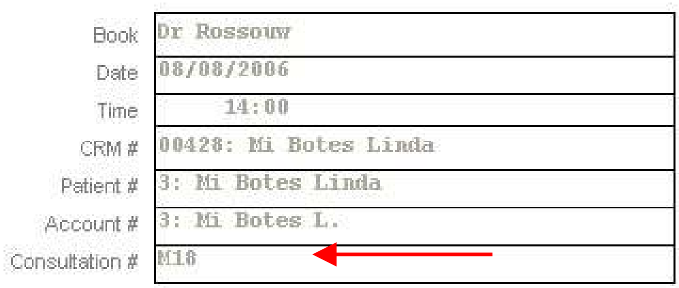
The same applies for the Account Holder.



The system then offers an opportunity to confirm where the Invoice for Payment should be submitted, i.e. Account Holder, Medical Aid, or both.

Hint: Some of the above steps may be omitted or be different according to your set up and operational requirements.

The system then displays the Consultation screen, which at this time we may just exit or save. Back on the Appointment screen, the Consultation link has now been established. Further entries to the Consultation record are seamless, i.e. no questions asked.



Above we can see that the appointment now has an established link to a Consultation record and will remember it.

So what happens in the case of a new Patient for whom we have no records yet? Actually, the same happens, but instead of VERIFYING the existing records, you will have to fill in the new Patient record, and then choose an existing Account to connect it with OR fill in a new Account record.

When to use 'Enter Consultation'

The most practical approach for this function is to use it on the day of the Appointment, and usually not before. For new Patients, we probably will not have available all the information we require to fill in the Patient and Account records, and for existing Patients we can hardly verify the current details until the Patient is present.

In other words, the best time to 'enter' the consultation record is usually when the Patient arrives, i.e. at Reception. This will mean that the consultation record is open when the Patients sees the Doctor, plus it is open for Invoice charges in connection with the consultation.

Since the Appointments for the day are neatly recorded in the Appointment book, it is also a practical check (at end of day …) whether all Appointments have been finalised, Invoices charged and closed, etc.