

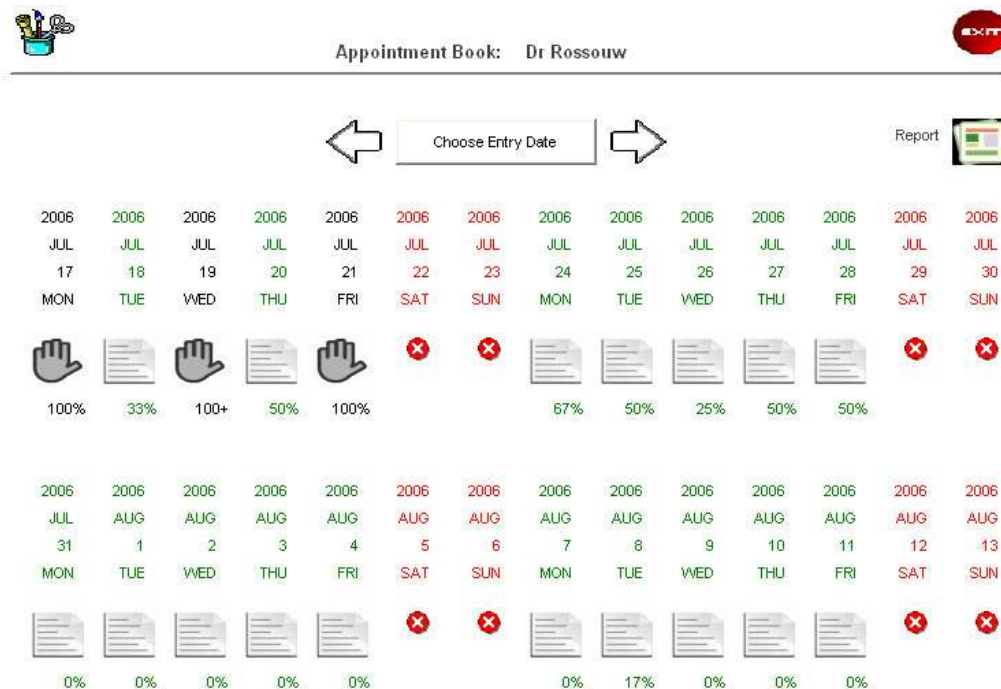
IES Appointments: Making Appointments

Purpose

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


How to make an Appointment

To make an appointment is a simple matter. Just open the Appointment Book by using the 'show' option, and choose the Date.



When looking at the Appointment Book, we can click on 'Choose Entry Date' to move the page to a different date, or we can use the arrows on either side of that function to page back and forth 2 weeks at a time, respectively.

Blocked Out Dates are shown in red, and signals that no appointments should be taken for these dates. Where a 'blocking hand' is shown, the day is already fully booked, and the '100%' means fully booked, while '100+' means fully booked plus Standby appointments in addition. The remaining dates, with the 'page' image indicates the current booking level.

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To enter any Date currently shown (even if blocked out!) you just click the image below the date. In this case we enter the date of 8 Aug 2006 in Dr Rossouw's Appointment Book, by clicking on the 'open page' image.



Appointment Book: Dr Rossouw

2006	2006	2006	2006	2006	2006	2006
AUG	AUG	AUG	AUG	AUG	AUG	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	Ms Botes Linda 063 276 7766
9	15:00	

We notice that there are currently 3 bookings on this date, and we can dbl-click on any empty time slot to make an appointment for that time, or we can click below the time slots on an empty line to make a Standby booking. In this case, we choose the 15:00 time slot.



New Appointment



Patient and Contact are the only required items, and can be auto-completed for existing Patients - click the FIND image to learn how.



1: -

If the Patient is NEW, just enter the Name and Contact number, plus any Notes if necessary.

Patient:

Contact:

Notes are optional

Book:

Date:

Time:

CBM #

Patient #

Account #

Consultation #

2: -

Once Patient and Contact have been specified you can choose SAVE to create the Booking.

A Medical appointment requires only 2 pieces of information, i.e. Patient Name and Contact Number. There is also a Notes field which is optional, and which can be used to indicate any further information that is either useful or required for our operation.

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For a NEW Patient, i.e. someone who has never been here before and for whom we have no Patient record, we simply note the Name and Contact Number, and any other information we wish to have (in the Notes field), and then choose SAVE to create the Appointment. When the Consultation record is opened (later, probably on the day of the appointment), then the Patient record will be created.

For an existing or former Patient that we already have details on file, we do NOT type the name. Instead, we use the lookup retrieval options to locate the Patient record, and then the system will automatically establish the necessary links to the Patient, CRM and Account records.

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The lookup image can be clicked for a reminder on how to use the lookup functions, and will display the following information: -

Patient retrieval may be done by means of the standard lookup or direct-type searching on multiple criteria: -

- 01) To use the standard lookup, press F2 or click the Lookup (dbl-click and choose Lookup).
- 02) To use an implicit multi-rule lookup, use a dot (.) and use any of the following: -

```
part_name.part_tel_no.part_address
OR
part_name..part_address
OR
part_name.part_tel_no
OR
..part_address
OR
.part_tel_no.part_address
OR
.part_tel_no
or
part_name.
```

in other words, use any 1, 2 or 3 parts to search on, separated by dot(.) and where part of the family name, if specified, is always BEFORE the 1st dot, and the tel no always after the 1st dot but before the 2nd dot, and the address pattern, if present, is always after the 2nd dot.


Examples: -

- a) finding by part name -

souw.
which would find something like 'Rossouw'

- b) finding by name and address -

rossouw..sunset boul
which would find 'rossouw' living on 'sunset boulevard'

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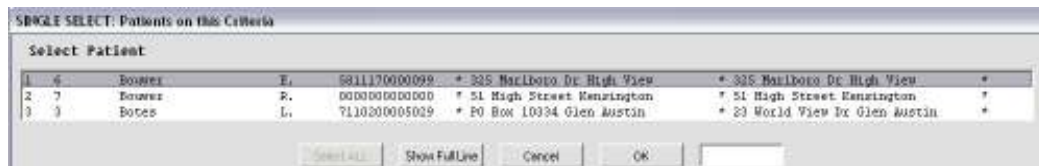
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c) finding by name, tel no and address -
 osso.5553.sunset
 which would find the same patient where the tel no includes '5553'

d) finding by address only -
 ..sunset
 which would find patients living on 'sunset boulevard', 'sunset rd', etc.

IF NO DOT (.) IS USED, THEN THE INPUT DATA IS CONSIDERED TO BE THE TYPING OF THE PATIENT NAME, I.E. NO LOOKUP IS ENTERED.

In other words, if we are looking for a Patient whose surname is 'Bouwer', we could type something like "bo.", and in this case the system yields the following:



The lookup list shows Name, Id no, and some address details, so it is quite easy to select the correct patient, and once selected, the system auto-completes the appointment, as well as establishing links to CRM, Patient and Account.



After this, we can just choose SAVE to create the appointment.

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Have you used your IES today?