Create an appointment type

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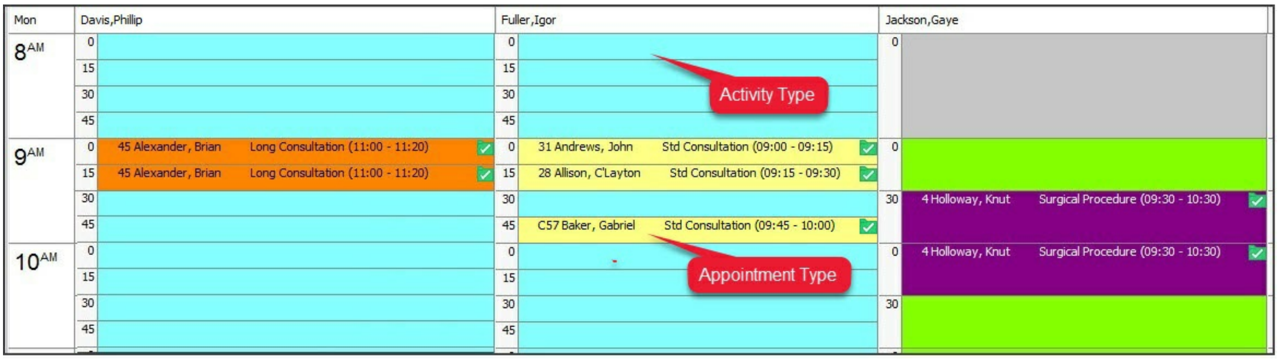
Create a new Appointment Type with a specific duration and assign the doctors that be booked for this Appointment Type via phone and via Online Appointments.

Overview

A practitioner's **Schedule** in the Appointment Book is allocated an **Activity Type** with a colour, for example, blue for Consultation time and purple for Theatre time. This tells staff what **Appointment Types** they should book in the doctor's schedule. Appointment types have a colour that replaces the colour of the Activity Type in the **Appointment Book**.

Example: A practice has a green **Activity Type - Theatre** used for the **Appointment Type** > **Surgery** and a blue **Activity Type -Consultation** used for the **Appointment Types**: **Long Consultation-**30min, **Std Consultation-**15min and **New Patient-**30min. Reception wants to book a **Std Consultation** and sees 2 doctors with a blue schedule and 1 doctor with a green schedule, and make the appointment in a blue block of time.



Set up an Appointment Type

In this section, you'll create an appointment type, give it a name and colour and assign it to an Activity Type. You will then be able to use that Appointment Type to make bookings in the time that's scheduled using that Activity Type.

To create an appointment type:

1. Go to Zedmed's **Management** tab.
2. Select **Practice Setup** then **Appointments** > **Appointment Types**.

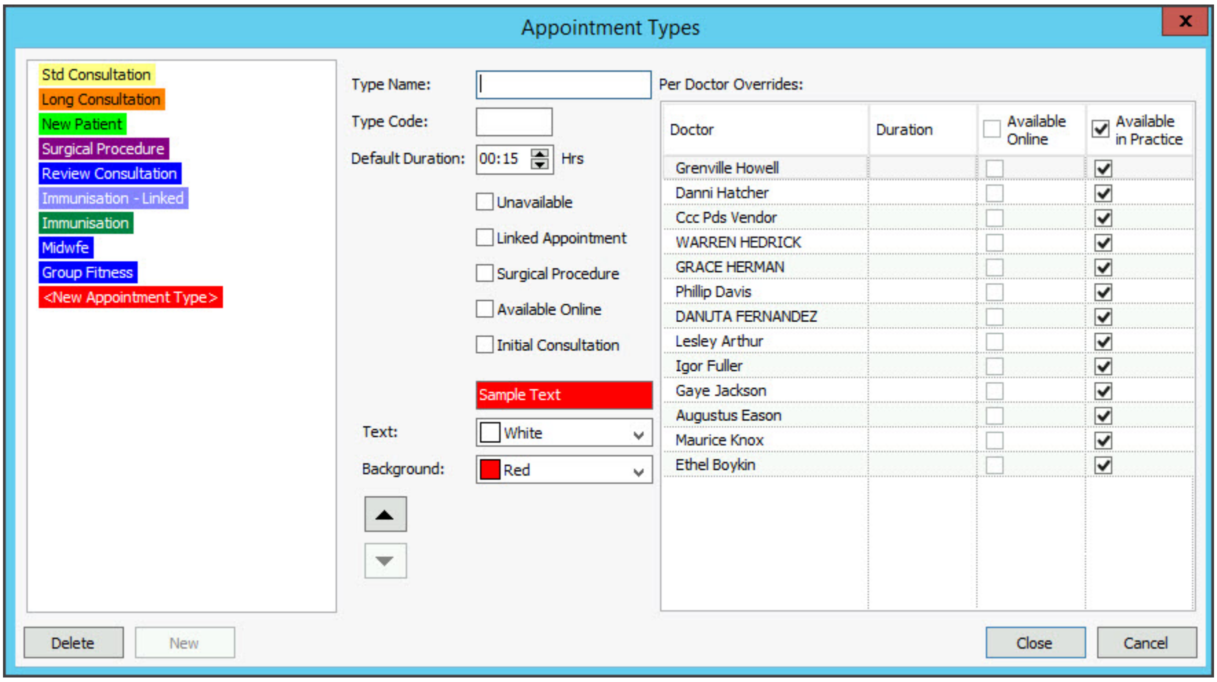
   The **Appointment Types** screen will open.
3. Select **New**.

   This will clear the fields so you can use them to create an Appointment Type.
4. In **Type Name**, enter a name for the appointment type.
5. In **Type Code**, enter a code for the appointment type.

   The code you create should follow a logical format. For example, you could use C for Consultation, O for Operation, V for Visit.

6. In **Duration**, enter the appointment's duration in minutes and hours.
7. Select any of the required options:
    - **Unavailable** - prevents the Appointment Type from being used.
    - **Linked Appointment** - for appointments that may require two practitioners or a non-attending practitioner to charge the attendance to. For example, an immunisation appointment may have a nurse for the attendance and a doctor to charge it to. When the appointment is made, you can select the other practitioner in the **Linked Appointment Details** screen, which opens when you select **Close**.
    - **Surgical Procedure -** this option is explained in the next section.
    - **Available Online** - the appointment will be available for Online Appointments on your website.
    - **Initial Consultation** - makes the Appointment Type only available to New Patients when a booking is made online. IF will not be available for existing patients. to learn more, see the Setup Online Appointments guide.
8. Select the appropriate **Per Doctor Overrides**.
    - **Available in Practice** - select the doctors that support this Appointment Type
    - **Available Online** - select the doctors that will be available for this Appointment Type via Online Appointments.
9. Use the colour options to assign the **Appointment Type** a colour.
10. Select **Close** to save and exit.

    To delete an appointment, select it, select **Delete** then confirm. You can't delete an Appointment Type that's in use.



Set up a surgical Appointment Type

Appointments for surgical procedures include a report called the Operations List, which is sent to the hospital the patient is attending. The Operations List contains information about the procedure and the booking for both the hospital and surgeon. Creating a **Surgical Procedure** and setting up the Operations List options are separate tasks, and each is explained below.

To set up a **Surgical Procedure** Appointment Type:

1. Follow steps 1-8 in the section above to create an Appointment Type called **Surgical Procedure**.
2. In the **Appointment Types** screen, select the **Surgical Procedure** Appointment Type**.**
3. Select **Close** to save and exit.

   Now that you have the Appointment Type set up, you need to configure the Operations List options.

To set up the Operations List's options:

1. Go to Zedmed's **Management** tab.
2. Select **Practice Setup** then **Drop-Down List Management**.

   The **Drop-Down List Management** screen will open.

   The contents of the **Checklist**, **Instrument** and **Procedure Type** categories determine what can be included in an Operations List. The items you add to each category are up to you, and examples are provided below.

   Repeat the following steps for each of these 3 categories.
3. Select the category.
4. Select **Add Value.**
5. Enter a name for the item into the field provided.

   The screenshot below shows examples of items including:

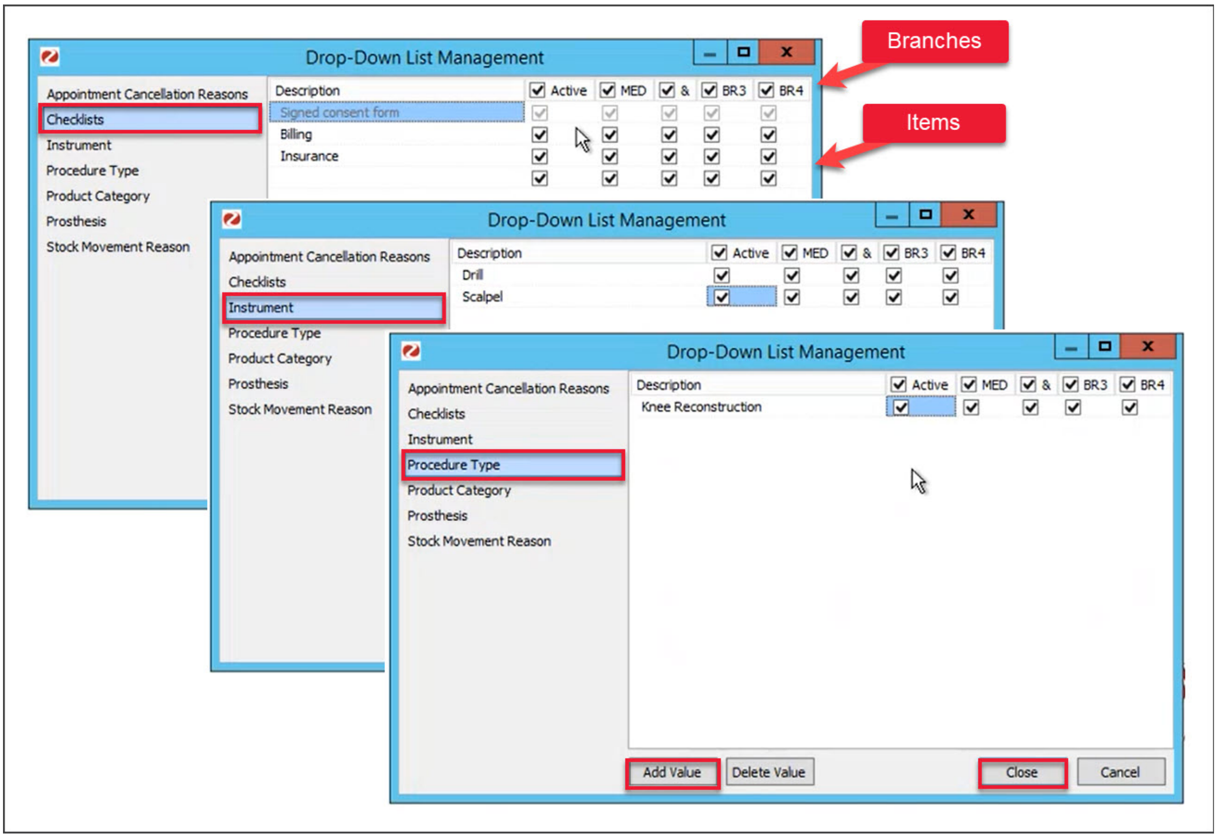
   - "Signed consent form" under **Checklist.**
   - "Scalpel" under **Instrument.**
   - "Knee reconstruction" under **Procedure Type**.
6. Select the tick box below each branch where the item should be available.

   Each branch is shown along the top.
7. Select **Close** to save and exit.

   To delete an item, select the item then select **Delete Value.** You can't delete an item that's being used.

   To remove an item as an option, untick the box by that item in the **Active** column.

   In the screenshots below, **MED**, **BR3** etc. are branches added by the practice. **Active** is a permanent column that's used to enable/disable an entry for all branches.


Branches
Items
Drop-Down List Management
Appointment Cancellation Reasons
Checklists
Instrument
Procedure Type
Product Category
Prosthesis
Stock Movement Reason
Description
Active
MED
&
BR3
BR4
Signed consent form
Billing
Insurance
Drill
Scalpel
Knee Reconstruction
Add Value
Delete Value
Close
Cancel