



Get the most out of



Appointments User Guide

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Appointments

The appointments section is used to book appointments for patients. You can have multiple branches / rooms / days on the screen at any one time.

Changing Views

To **filter** your view, you can tick the **Branches**, **Rooms**, **Date** and View from across the top of the screen.

You can use the '**View**' options to alter the number of days that are visible on screen.

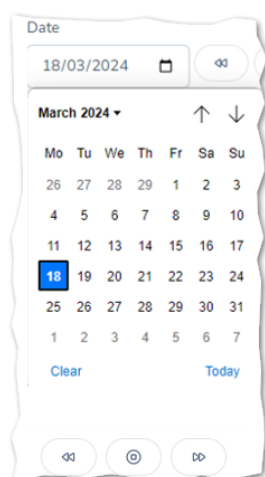
Date and View options are applied immediately to your display.

If you change the Branch or Rooms, you can apply your new selections by clicking on the **Go** button.



6-Day view is displayed in the example below.

You can alter the date your view starts on by using the date picker, or the scroll buttons.



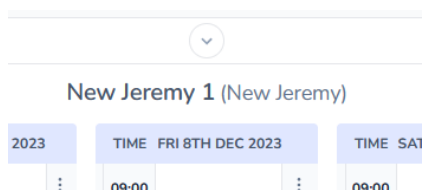
The scroll buttons operate differently depending on your view. Some views operate differently depending on the [week start on Monday option](#) in the branch settings.

View	Back	Centre	Forward	Monday Start
1 Day	Previous day	Today	Next day	Off
2 Day	Back 2 days	Today	Forward 2 days	Off
3 Day	Back 3 days	Today	Forward 3 days	Off
5 Day	Back 5 days	Today	Forward 5 days	Off
6 Day	Back 6 days	Today	Forward 6 days	Off
Week	Back 1 week	Today	Forward 1 week	Off
Fortnight	Back 2 weeks	Today	Forward 2 weeks	Off
Week	Start of previous week	Start of current week	Start of next week	On
Fortnight	Start of previous fortnight	Start of current fortnight	Start of next fortnight	On
Month	Start of previous month	Start of current month	Start of next month	N/A

You can hide or show the branch / date options by selecting the Hide/Show arrow beneath the scroll buttons.



This makes more screen space available for viewing the appointment slots.



You can view the date / branch selections by click the Hide/Show arrow again.

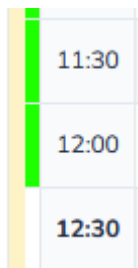


Slots

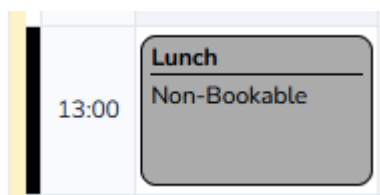
The slots are displayed in a configurable colour based on the default reason.

The height of the slots is variable based on the length of the slot. This makes it easier to see where the gaps are in your diary.

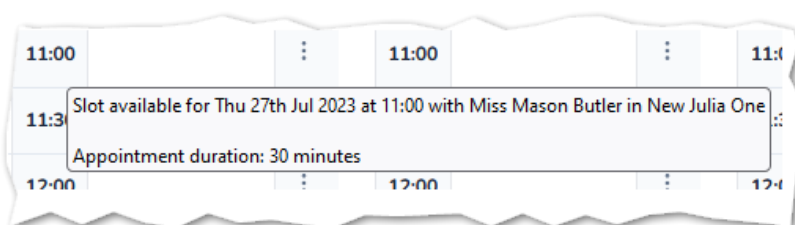
Elapsed times are displayed with a green bar.



Non-bookable slots are displayed with a Black bar.



Hovering over a slot displays a tooltip with information about the slot.



Day Notes

Notes can be added for each day using the 'Day Notes' control.

Day notes

These notes are saved automatically.

The current day has a yellow background to easily identify it.

R5BP				R5BP			
TUE 21ST MAY 2024				WED 22ND MAY 2024			
09:00	(30)			09:00	(30)	<input type="checkbox"/>	⋮
09:30	(30)			09:30	(30)	<input type="checkbox"/>	⋮
10:00	(30)			10:00	(30)	<input type="checkbox"/>	⋮
10:30	(30)			10:30	(30)	<input type="checkbox"/>	⋮

Actions Menu

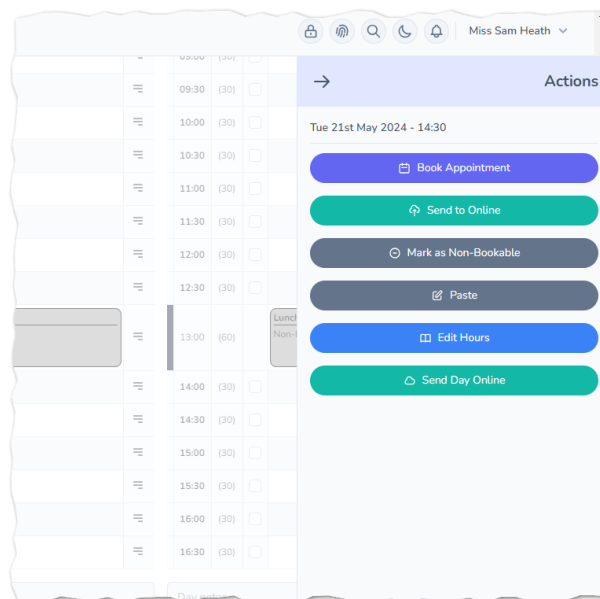
The **three lines** menu will be available for carrying out actions to slots.

Clicking the three lines will display a pop out menu with options relating to that slot.



The options available will change depending on your application permissions and whether the slot you have selected is in the future or the past.

The menu for a future appointment slot is shown as below.



Book Appointment

When you select Book Appointment from the menu, you can Add a Patient into a slot to record their upcoming appointment.

The 'Book Appointment' modal form contains the following fields and controls:

- Room:** Text input with 'New Jeremy 1'.
- Examiner:** Text input with 'Mx Elsie Allen'.
- Date:** Text input with '09 / 12 / 2023'.
- Reason:** Dropdown menu with 'Sight Exam' selected.
- Time:** Text input with '12:00'. Below it, 'Min: 12:00 Max: 12:29'.
- Length:** Text input with '30'. Below it, 'Max: 60'.
- Buttons:** 'Find a Patient' (blue), '+ Create a Patient' (grey), and 'Miss Alex Kennedy (16)' (light blue).
- Notes:** A large text area for notes.
- Save:** A green button with a checkmark and the text 'Save'.

The Room, Examiner and Date are all pre-selected based on the slot you are booking into.

You can change the Reason, Time, and Length. There are constraints on how much flexibility is available due to preceding and following slots. Nova will calculate availability automatically for you so there are no double bookings or overlaps.

You can select a patient who is on your active list by choosing their name from the list of active patients. You can also click 'Find a Patient' to reserve this slot for an existing patient or click 'Create a Patient' to add a new patient record.

This close-up shows the patient selection controls:

- Find a Patient:** A blue button with a magnifying glass icon.
- Create a Patient:** A grey button with a plus icon.
- Selected Patient:** A light blue button displaying 'Miss Alex Kennedy (16)'.

Finding a patient is done using the patient search popup, that is displayed automatically.

Once you have found the patient, click Select.

✓ Select

The appointment booking window now displays the patient you selected previously.

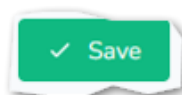
The patient information bar displays the following details:

- Close:** A circular button with an 'x' icon.
- Patient Name:** 'Miss Alex Kennedy (16)'.
- Phone Number:** '#2663551'.
- Email:** 'suzanne.palmer@example.org'.
- Phone Number:** '+443126460205'.
- Action:** A blue link labeled 'Go to Px Record'.

If you want to choose a different patient, you can click the grey X to remove your selection.



Once you are happy with your booking, click Save to update your diary.



The patient's name is now displayed in the diary and recorded against their patient record.



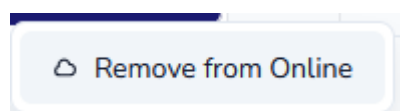
Send to Online

If using Online Booking use the Send to Online option to make a slot available on your online booking portal. This allows existing patients and new patients to book an appointment directly.



The **Orange** band of colour denotes that a slot may not be available for booking.

The three lines menu will be updated for online slots to display an option to remove the slot from the online site.



Paste

The Paste option allows you to move a 'Cut' appointment from one slot to another.

Edit Hours

This option is only available if you have the relevant permissions on your user role.

It allows you to generate slots for future appointments.

It is possible to load hours from a preconfigured template using the combo in the top right.

Selecting an option in this list, will update the table on screen.

You can add and remove sections of time using the delete and add options.



You can change the default reason for each section of time using the combo in the table. This will update the split (slot length) to the default length for the selected reason.

REASON	START	END	SPLIT	STAFF	
Sight Exam	09:00:00	13:00:00	30	Ruth Johnson	
Available	13:00:00	14:00:00	60	None	
Sight Exam	14:00:00	17:00:00	30	Ruth Johnson	
CL Exam					
Lunch					
Closed					

Enter template name ✓ Save as a new template

You can also change the split manually if required.

You can edit the start and end time for each section as well as the staff member.

If you would like to save your changes you can enter a template name and click 'Save as new template' so you can reuse your setup in future.

Enter template name ✓ Save as a new template

Once your timings are set, you can choose to apply this configuration to multiple days.

Apply to multiple days

Every Day
Days of the Week
Specific Days

If you only want to change the times for one day, then leave this section blank and click 'apply changes'.

✓ Apply changes

Editing the hours will not affect existing appointments.

There are three options available for applying the setup to multiple days.

Everyday

This option applies the timings to everyday for a set number of weeks.

Apply to multiple days

Every Day

Every Day For 0 Weeks

Days of the week

This option will apply the timings to the selected days of the week for the set number of weeks – e.g. Tuesday, Wednesday, and Friday for 6 weeks.

Apply to multiple days

Days of the Week

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
Mon <input type="checkbox"/>	Tue <input checked="" type="checkbox"/>	Wed <input checked="" type="checkbox"/>	Thu <input type="checkbox"/>	Fri <input checked="" type="checkbox"/>	Sat <input type="checkbox"/>	Sun <input type="checkbox"/>

Selected Days For 6 Weeks

Specific Days

For specific days, you can choose to apply your timings to specific days within the month. E.g. the 7th, 10th, 11th etc.

Apply to multiple days

Specific Days

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>	7 <input checked="" type="checkbox"/>	8 <input type="checkbox"/>	9 <input type="checkbox"/>
10 <input checked="" type="checkbox"/>	11 <input checked="" type="checkbox"/>	12 <input checked="" type="checkbox"/>	13 <input checked="" type="checkbox"/>	14 <input type="checkbox"/>	15 <input type="checkbox"/>	16 <input type="checkbox"/>
17 <input checked="" type="checkbox"/>	18 <input type="checkbox"/>	19 <input type="checkbox"/>	20 <input type="checkbox"/>	21 <input type="checkbox"/>	22 <input type="checkbox"/>	23 <input type="checkbox"/>
24 <input type="checkbox"/>	25 <input type="checkbox"/>	26 <input type="checkbox"/>	27 <input type="checkbox"/>	28 <input type="checkbox"/>	29 <input type="checkbox"/>	30 <input type="checkbox"/>
1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>	7 <input type="checkbox"/>

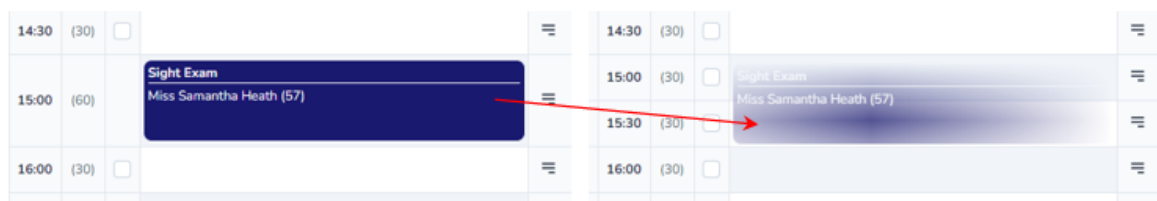
Appointments

Booked appointments display in the diary with a background colour that corresponds to the appointment reason.

15:00	(60)	Sight Exam Miss Samantha Heath (57)	≡
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You can click the time on the left-hand side to update the appointment.

It is also possible to drag and drop the appointment to another time slot.

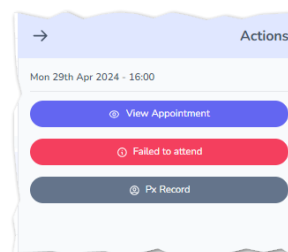


When an appointment has been booked, the three lines menu provides different options depending on whether the appointment is:

in the future



Or in the past



Update Appointment

The option to Update an appointment allows you to make changes to a currently booked appointment.

You can change the appointment reason, and the length of appointment.

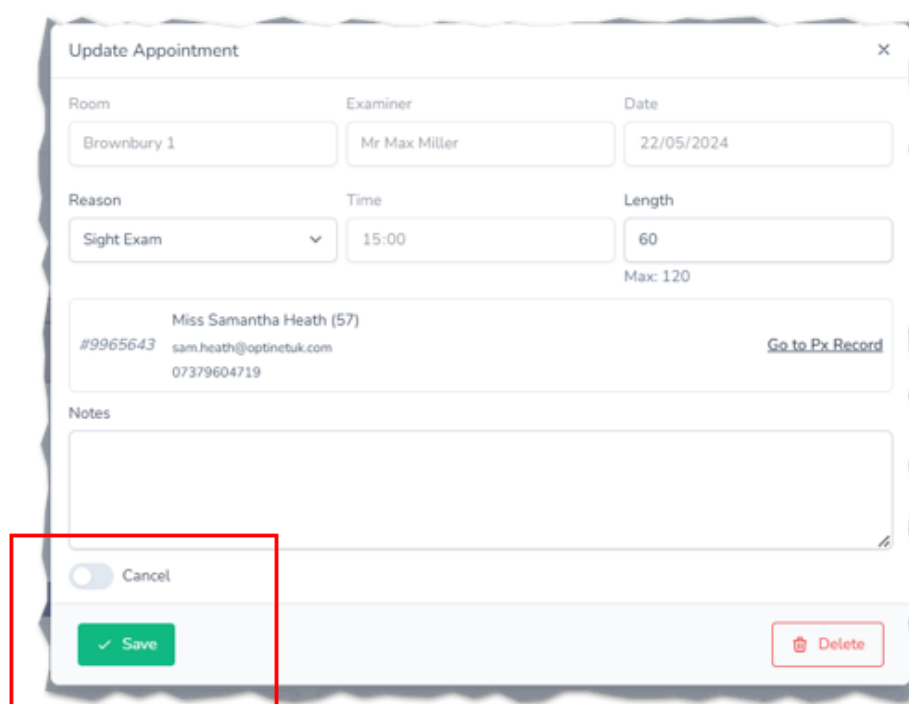
There are restrictions on the time and length to avoid clashes with other slots. A help message is displayed with the valid times and length available.



A snippet of a form with two input fields. The first field is labeled 'Time' and contains the text '15:00'. The second field is labeled 'Length' and contains the text '60'. Below the 'Length' field, the text 'Max: 120' is displayed.

Updating the length will cause the following slots to update (assuming there are no booked appointments after the current slot)

To cancel the appointment, toggle the Cancel switch. (Bottom left of the popup window, above Save)



A screenshot of a 'Update Appointment' popup window. The window contains several fields: 'Room' (Brownbury 1), 'Examiner' (Mr Max Miller), 'Date' (22/05/2024), 'Reason' (Sight Exam), 'Time' (15:00), and 'Length' (60). Below these fields is a section for 'Miss Samantha Heath (57)' with contact information and a 'Go to Px Record' link. A 'Notes' section is also present. At the bottom, there is a 'Cancel' toggle switch, a green 'Save' button, and a red 'Delete' button. A red box highlights the 'Cancel' toggle switch and the 'Save' button.

Then enter a cancellation reason into the control that appears.

Cancellation Reason



A single-line text input field for entering a cancellation reason.

Click Save to confirm your changes.



A green button with a white checkmark and the text 'Save'.

Copy

Copying an Appointment, allows you to move it to another time slot. You can use the corresponding Paste option (on an empty slot) to complete the move.

Edit Hours

This option has the same functionality as the Edit Hours option on the slot menu. Existing appointments are not overwritten when editing hours.

Delete

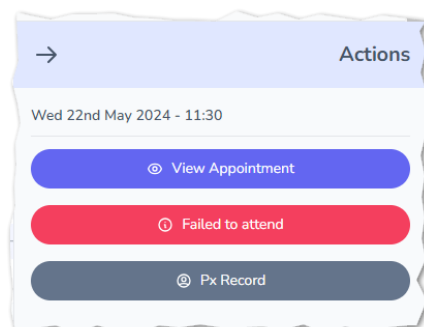
You can delete the appointment so there is no record of it. This option should only be used when an appointment has been booked in error. If a patient has cancelled, then use the Update Appointment option.

Px Record

Clicking this option takes you to the patient record. This opens the record in a new browser tab, so your view of the diary is unchanged.

Failed to Attend

Marking a past appointment as 'Failed to attend' records non-attendance for the appointment.



The coloured band against the slot is made red and the slot cannot be used by another patient.



The menu option available against an appointment marked as 'failed to attend', is now changed to 'Mark as attended', should you wish to update the appointment again.

