

Follow Up Appointment Administration

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Summary

The Follow Up Appointment feature provides a guided workflow for the team to follow to encourage the booking of a next appointment. When a patient visits the practice, the vet will add treatment and recommend the next appointment. Reception will then be able to book the appointment using the vet's recommendation.

This is an optional workflow and can be switched on/off by site.

The screenshot shows the 'Configuration Settings' window. On the left is a 'Categories' sidebar with a list of system modules: Account, Reporting, Diary, Reception, Treatment, Referral, Lab, Vet Scan Lab, Labelling, SMS, Email, DayLists, System, Miscellaneous, HTML Labelling, Smart Flow, VetCheck, Follow Up (highlighted with a red box), GDPR, PACS, and Message. The main panel is titled 'Configuration Settings' and includes a 'Site' dropdown menu set to 'Esher SA' and a 'Save' button. Below this, the 'Follow Up Appointment' section contains a checked checkbox for 'Memo Popup when Saving Treatments accessed via Appointment'. Underneath, there is a label 'Follow Up Appointment' followed by a dropdown menu showing 'Follow Up Appointment Enabled and Selected' (also highlighted with a red box), and an unchecked checkbox for 'Declined Appointment - Do not prompt for reason'.

Details

The following Settings and Library configurations affect the Follow Up Appointment feature:

Configuration Settings

Administration > Settings > Follow Up

Memo Popup when Saving Treatments accessed via Appointment

If ticked, the memo will pop-up when selecting a patient from the diary screen (if the vet entered a memo).

Declined Appointment - Do not prompt for reason

If ticked, declining an appointment will not prompt the user to record a reason.

Enable/Disable Module

Select a setting from the drop-down list. the options are as follows:

Follow Up Appointment Disabled = Disables the module.

Module Enabled and Enforced = Module Enabled and Follow up prompt mandatory.

Follow Up Appointment Enabled and Selected = Module Enabled and Follow up appointment required checkbox ticked by default.

Follow Up Appointment Enabled and Unselected = Module Enabled and Follow up appointment required checkbox un-ticked by default.

Library Configuration

Administration > Appointments

Appointment Reasons

In this library, you can set the recommended return duration for each appointment reason and enable its use within the module.

You can set the number of weeks/days using the 3 columns below:

Ret. Durations = Sets the follow up duration.

Ret. Type = Type of Duration (Weeks/Days).

Ret. Use = Ticking this option will enable the reason to be used within the module.

Please note that Appointment Reasons are site specific, therefore appointment reasons must be configured per site. Also, ensure default appointment lengths (i.e. 10 minutes) are configured as accurately as possible.

Surgeon Availability

In order to book appointments in the future, [Surgeon Availability](#) will need to be configured. We recommend setting up availability for at least 52 weeks (if possible) in order to book the future appointments required.

Reporting

The following reports can be accessed via Utilities > Reports > Standard Reports > Appointments.

Successful Follow Up Appointments

Provides a breakdown of follow up appointments between dates specified for any appointments with the status 'Arrived' or 'Treated'.

Turnover of Follow Up Appointments

Displays how much revenue was generated by follow up appointments between dates specified.

HCP Follow Up Appointments

Shows the number of appointments booked using the Follow Up Appointments feature by Health Care Plan Status.

[+ Add label](#)
