

Follow Up Appointments

18/07/2025 4:21 pm BST

Summary

The Follow Up Appointment module provides a guided workflow for staff 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. For information see: [Follow Up Appointment Administration](#).

Details

The follow up feature only works from a booked appointment via reception/waiting list.

Treating a Patient

1. The user will select a patient from the waiting list/diary and dispense treatments.

The screenshot shows the 'Treatment' module interface. At the top, there are tabs for 'History', 'Pre-Invoice', 'Add Treatment', 'Prescriptions', 'Saved Estimates', 'Documents', 'Patients', 'Client Notes', 'Archive', and 'Health Care Plan'. The 'Add Treatment' tab is active. Below the tabs, there are input fields for 'Item Date' (18/07/2025), 'MWI Pharmacy', 'Description' (search using a minimum of 2 characters), 'Code', 'Clinical Code' (General), 'Patient' (Poppet), and 'Surgeon' (Jamie Smith). There is also a 'Dispense from' dropdown menu set to 'Escher'. Below these fields is a 'Draft Items' table with the following data:


| Date | Patient | Description | Clinical Code | Qty | Net | VAT | Total | Surgeon | Site | Gp | Computer | Modified | Modified By | HCP |
|------------|---------|--------------------|---------------|-----|-------|------|-------|-------------|--------|----|----------|------------|-------------|--------------|
| 18/07/2025 | Poppet | Consultation - Vet | General | 1 | 41.34 | 8.27 | 49.61 | Jamie Smith | Escher | | Admin | 18/07/2025 | jupiter | Consultation |

2. When saving the treatments from draft, a pop-up will display 'Set as Treated?' if you have finished with the patient, select 'Yes'.

The screenshot shows a pop-up dialog box with a question mark icon and the text 'Set 16:00 appointment as Treated?'. Below the text are two buttons: 'Yes' and 'No'.

3. The Patient will be set as 'Treated' and the below window will appear.

End Appointment

 Reminders are Overdue

☒ Follow Up Required


Book a follow up appointment for:

Consultation

▼

to be seen around

18/07/2025



with a

10

▼

appointment length

at Site

Esher SA

▼

to see


Jamie Smith

▼

Is there medication to collect?

☐

Memo



Continue

Note: This window will not display if the patient has been euthanised.

4. At this stage the vet will specify:

a) An Appointment Reason (Reason for next visit).

b) Date for next appointment (Auto-calculated if configured - see: [Follow Up Appointment Administration](#)).

c) Appointment Length (Uses default for Appointment Reason - see: [Diary Administration](#)).

d) Select which site the appointment should be booked for.

e) Select the Vet/Nurse the patient should see (if available).

f) Tick the checkbox to advise reception if the Client needs to collect any medication.

g) Insert any comments into the memo field (i.e. 'book appointment between 1-6pm')

h) Select 'Continue'.

5. At this stage, the vet has made their recommendation to reception and they can move onto treat the next animal and a note regarding the recommended follow up appointment is also added to the Patient's treatment history.

Viewing the Next Appointment Summary

When selecting a treated patient from a daylist or diary screen, an Appointment Summary will display in

the left-hand side menu containing the follow up appointment recommendation.

This Summary bar contains the following information:

Appointment Summary

Book Castrate around 31/07/2025 to see Nurse
Consults for 10 minutes

Reminder Summary

Vaccinat... due 20/07/2025

Memo

| Date | Patie... | Reas... |
|----------|----------|---------|
| 18/07... | Pip | Cons... |

Make Appointment

Appointment Declined

Medication to Collect

Take Payment

End Appointment

Appointment Summary: The vet's recommendation for the Patient's next appointment.

Reminder Summary: A summary of the Patient's reminders

Memo: Any memo notes added for the recommended appointment.

Next Appointments: Details of any existing future appointments

Following the Workflow

The five buttons in the bottom left-hand corner of the summary can be followed chronologically.

1) Make Appointment

Diary

Appointment Summary

Book & Monitor Health Check around 26/09/2025 to see Jamie Smith for 10 minutes

Reminder Summary

Vaccinat... due 23/01/2008

Memo

| Date | Patie... | Reas... |
|----------|----------|---------|
| 18/07... | Katie | Cons... |

Make Appointment

Appointment Declined

Medication to Collect

Take Payment

End Appointment

Diary

Refresh + New Edit X Delete

Display columns: 4 Day Note

Day Week Month Availability Surgeons Day Notes

Jamie Smith

Cremation List

| Time | Appointment |
|-------|-------------|
| 09:00 | |
| 09:15 | |
| 09:30 | |
| 09:45 | |
| 10:00 | |
| 10:15 | |
| 10:30 | |
| 10:45 | |
| 11:00 | |
| 11:15 | |
| 11:30 | |
| 11:45 | |
| 12:00 | |
| 12:15 | |

a) Select the 'Make appointment' button. This will take you to the Diary screen for the date recommended by the Vet/Nurse.

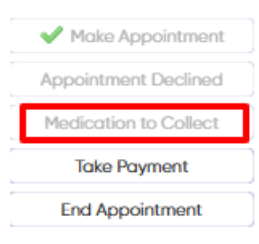
b) Double-click a time slot to book the appointment as normal.

c) When booking the appointment, the appointment details are pre-populated with the recommended details. Insert initials and Save appointment.

If the Client declines the appointment or a next appointment is not required, then the user can select the 'Appointment Declined' button. The user will then be prompted to select a declined reason.

2) Medication to collect

If there is no medication to collect, the button will be inactive.



If there is medication to collect, the button is active. Selecting this button will display a list of medication to be collected by the client with the ability to 'Print Label' for the treatment.

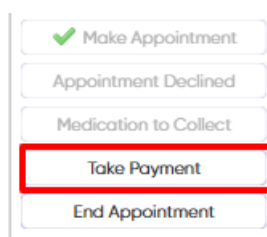
3) Take Payment

The next step is to 'Take Payment'.

a) Select 'Take Payment' and you will be navigated to the [Accounts > Payments screen](#) for the Client.

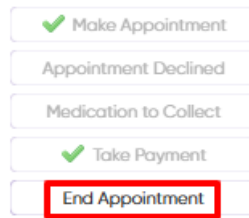
b) Take the payment as normal and select 'Save'.

c) Once the payment has been saved, the take payment button becomes in-active with a tick displayed.



End the Appointment

The final stage is to end the appointment by selecting the 'End Appointment' button.



Once selected, the Appointment Summary side bar will close and selecting the patient from the Full List/Treated list will no longer display in the appointment summary bar.
