Appointment Library

29/07/2025 9:05 am BST

Summary

This page documents the libraries available under the Appointments library.

For information on how to update/sort libraries, see: How to use

Details

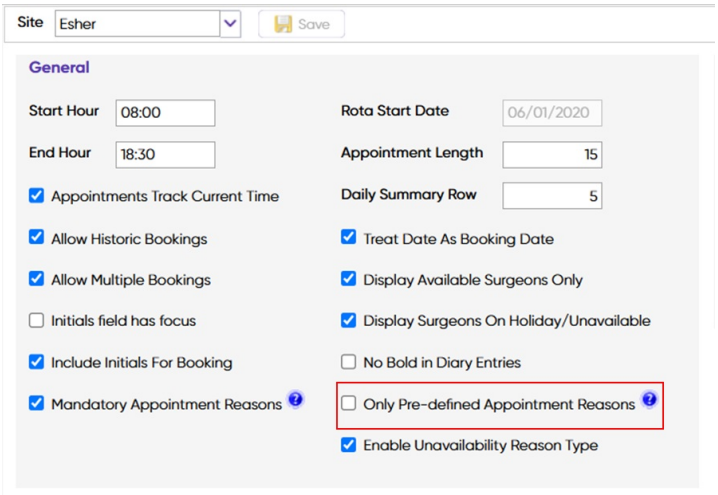
Appointment Reasons

When you make an appointment in Merlin, you are able to specify a reason for the appointment. Within the Setting>Reception screen you are able to enable a setting to stop users free typing appointments.

To enable predefined appointment reasons, you will first need to set them up for your practice.

NOTE: Setting the feature before creating the reasons will prevent you from creating any appointments.

Users can then turn on the predefined appointment reasons by following the path Administration/Settings/Diary/Only Pre-defined Appointment Reasons.



There are some other interactions to be aware of:

- Mandatory Appointment Reasons has been added to the administration settings. Predefined and Mandatory settings interact with each other.
- If 'Mandatory Appointment Reasons' is OFF and 'Only Pre-defined Appointment Reasons' is ON, the user can provide a predefined reason or no reason.
- If both are ON, then the user must provide a predefined reason.

There are three types of appointment reasons: Appointment Reasons, Hospital Reasons and Declined Reasons.

Appointment Reasons: Display when booking a standard appointment.

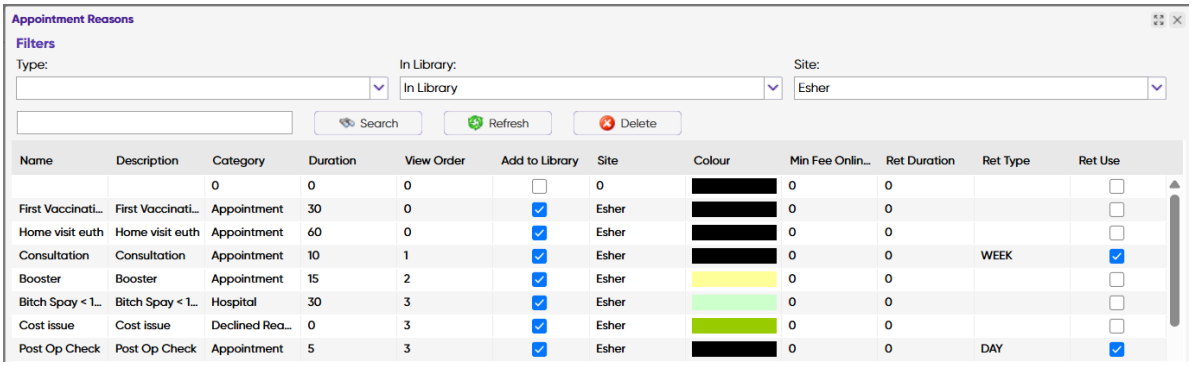
Hospital Reasons: Only display when booking a hospital appointment.

Declined Reasons: Used as part of the Follow Up Appointment module to record declined appointment reasons.

When an appointment is made in a Hospital Column, the Hospital Reasons are used, for all other appointments, the standard Appointment Reasons are used.

Appointment Durations: It is possible to set the duration of your appointment reasons. If used it is advisable to have your diary slots set at 5 minute intervals so varying appointment durations can be booked in. Note: Appointment Durations are required when using MWI Pet.

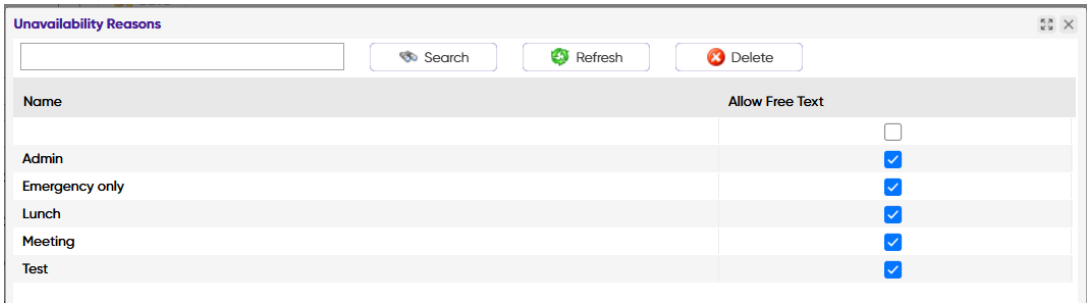
As shown in the example below it is possible to use different colours to identify different appointment types.



Name	Description	Category	Duration	View Order	Add to Library	Site	Colour	Min Fee Onlin...	Ret Duration	Ret Type	Ret Use
		0	0	0	☐	0		0	0		☐
First Vaccinati...	First Vaccinati...	Appointment	30	0	☑	Esher		0	0		☐
Home visit euth	Home visit euth	Appointment	60	0	☑	Esher		0	0		☐
Consultation	Consultation	Appointment	10	1	☑	Esher		0	0	WEEK	☑
Booster	Booster	Appointment	15	2	☑	Esher		0	0		☐
Bitch Spay < 1...	Bitch Spay < 1...	Hospital	30	3	☑	Esher		0	0		☐
Cost issue	Cost issue	Declined Rea...	0	3	☑	Esher		0	0		☐
Post Op Check	Post Op Check	Appointment	5	3	☑	Esher		0	0	DAY	☑

Unavailability Reasons

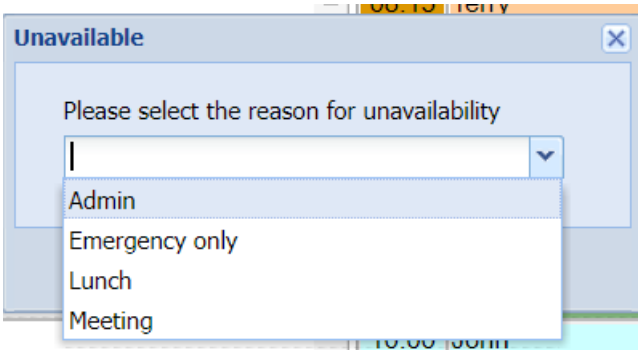
It is possible to create Unavailability reasons to use when marking a slot as unavailable in the diary.



Name	Allow Free Text
	☐
Admin	☑
Emergency only	☑
Lunch	☑
Meeting	☑
Test	☑

Selecting 'Allow Free Text' will allow the user to add on any free text after selecting the reason to give more context where necessary.

To access the reason right click the slot in the diary, select unavailable and select from the options as shown in the examples above.


Unavailable
Please select the reason for unavailability
Admin
Emergency only
Lunch
Meeting