

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

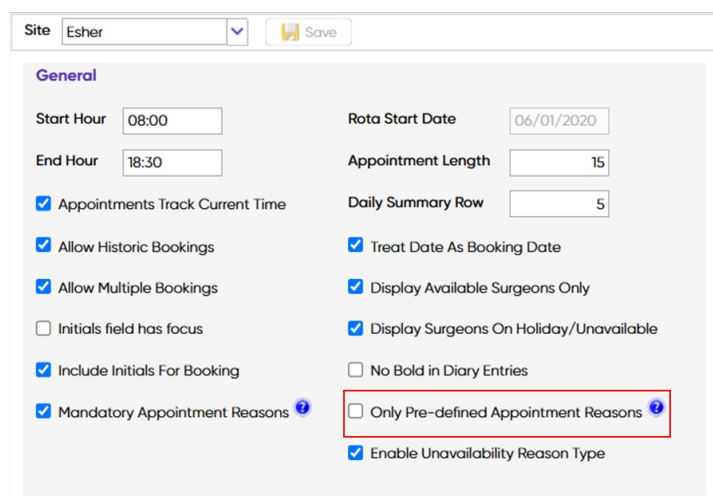
Appointment Reasons

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](#).



The screenshot shows the 'General' settings for the Appointment Library. At the top, there is a 'Site' dropdown menu set to 'Esher' and a 'Save' button. Below this, the 'General' section contains various settings. On the left, there are input fields for 'Start Hour' (08:00) and 'End Hour' (18:30). Below these are several checkboxes: 'Appointments Track Current Time' (checked), 'Allow Historic Bookings' (checked), 'Allow Multiple Bookings' (checked), 'Initials field has focus' (unchecked), 'Include Initials For Booking' (checked), and 'Mandatory Appointment Reasons' (checked). On the right, there are input fields for 'Rota Start Date' (06/01/2020), 'Appointment Length' (15), and 'Daily Summary Row' (5). Below these are more checkboxes: 'Treat Date As Booking Date' (checked), 'Display Available Surgeons Only' (checked), 'Display Surgeons On Holiday/Unavailable' (checked), 'No Bold in Diary Entries' (unchecked), 'Only Pre-defined Appointment Reasons' (unchecked, highlighted with a red box), and 'Enable Unavailability Reason Type' (checked).

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.

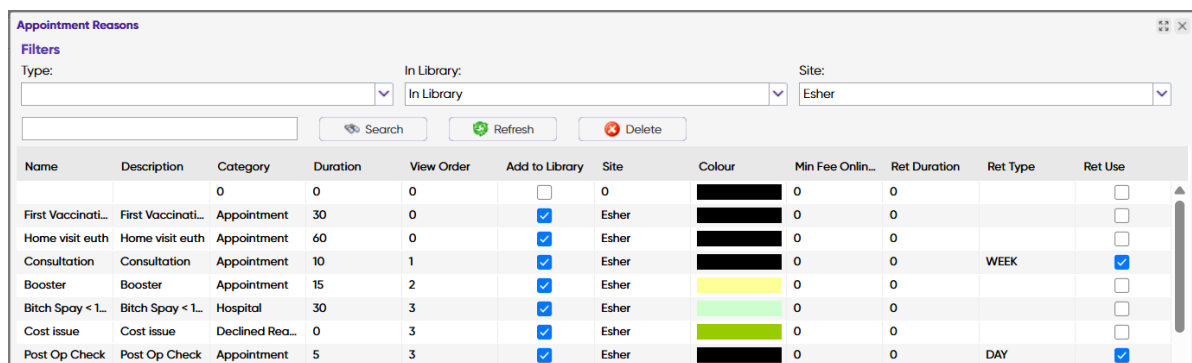
Hospital Reasons: Only display when booking a hospital appointment.

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](#).

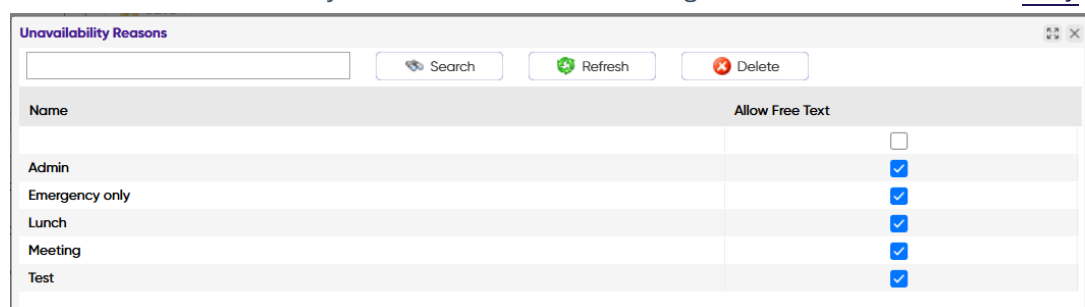
As shown in the example below it is possible to use different colours to identify different appointment types.



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

Unavailability Reasons

It is possible to create Unavailability reasons to use when marking a slot as unavailable in the [diary](#).



Name	Allow Free Text
	<input type="checkbox"/>
Admin	<input checked="" type="checkbox"/>
Emergency only	<input checked="" type="checkbox"/>
Lunch	<input checked="" type="checkbox"/>
Meeting	<input checked="" type="checkbox"/>
Test	<input checked="" type="checkbox"/>

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