Appointment Management

Book an appointment

1. Open the New Appointment screen:

   - click **+** in the top right corner of the menu bar > **New appointment**

     or

   - double-click a timeslot in the appointment book.

2. Send the demographic information form to the Patient to fill out.

3. Enter the appointment date, time, and provider.

4. Click to link or create a condition.

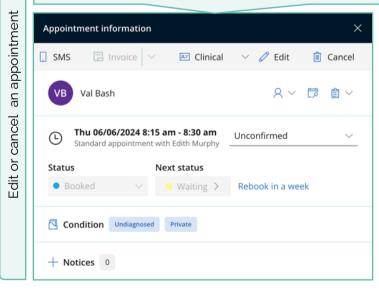5. Click if the Patient would like to be added for the waiting list for an earlier appointment.

New appointment

New appointment ✕

Patient *
[VB] Bash, Val ✕
Add patient from waiting list ⓘ
Add notices ≫

Request personal i[...] Update   **2**
▷ Send a link   ⌷ Generate a QR code

Type *   Duration (mins) *
Standard appointment ✕   15

Appointment details *

Edith Murphy   **3**
06 June 2024
8:15 am - 8:30 am
Bp Software Omni Demo   >

🗋 Undiagnosed   Private   **4**   >

Urgent | Repeat | **Waiting list**   **5**

Priority *   List expires *
1 | 2 | 3   06/06/2024 📅   ☐ Any provider

Comment

Save appointment   Cancel

Current conditions

Current conditions   + New condition ←

In progress (1)   Discharged (0)

◉ Undiagnosed
Created today | Private

Edit or cancel an appointment

Right-click on the appointment > **Edit appointment/Cancel appointment.**

Or

Left-click on the appointment to display the Appointment information screen > **Edit/Cancel.**

Appointment information

Appointment information ✕

📱 SMS | 🗒 Invoice | ⌄ | 🗚 Clinical | ⌄ | ✏ Edit | 🗑 Cancel

[VB] Val Bash   👤⌄ 🗒 📋⌄

🕐 **Thu 06/06/2024 8:15 am - 8:30 am**   Unconfirmed ⌄
Standard appointment with Edith Murphy

Status   Next status
● Booked ⌄   ● Waiting ›   Rebook in a week

🗋 Condition Undiagnosed   Private

+ Notices 0

Omni