Book and Edit an Appointment
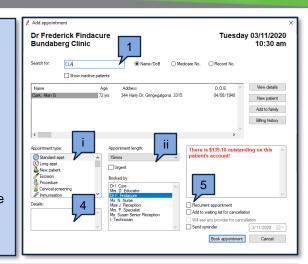
Booking an Appointment

1. Double-click empty timeslot and search for patient.
2. Double-click a patient to book a standard appointment.
3. To book other appointment type:
   i. Highlight patient > select **Appointment type**.
   ii. Adjust **Appointment length** from dropdown list as required.
4. Free type additional appointment notes in **Details** window (e.g., needs form signed).
5. If the appointment is recurring, tick the box and follow the prompts.
6. Click **Book appointment**.

> 💡 Unavailable appointment slots will never be booked by a recurring appointment.
>
> Inspect the future appointment slots to ensure that appointments have been booked satisfactorily.

Edit Appointment

Edit an Appointment:

1. Highlight appointment > right-click > select **Edit appointment.**
2. Edit appointment type, length, details or add to waiting list for cancellation as required.
3. Click **Save** to return to Appointment Book.

Move an Appointment:

1. Highlight appointment > right- click > **Move appointment.**
2. Make date, time and provider selections.
3. Click **Move** to return to Appointment Book.

> 💡 If you want to move, or modify all instances of a recurring appointment, you must modify each appointment. Use the **Find appointment** window to manage appointments.

Cancel an Appointment

Cancel an Appointment:

1. Highlight appointment > right- click > select **Cancel appointment.**
2. Enter a reason for cancelling appointment.

> 💡 If you accidentally create a set of recurring appointments, you must cancel each appointment.

Waiting list for Cancellation:

If configured in your setup, the waiting list for cancellations will display.

1. Highlight patient on the list > click **Select**.
2. Click **Yes** if prompted that patient already has an appointment. Patient contact details will appear.
3. Click **Accept** or tick **Leave on waiting list for another cancellation**.

Find an Appointment:

Press **F2** or select **File** > **Find appointment**

Find a Cancelled Appointment:

Appointment Book > **View** > **Canceled appointments**

Print a Day Sheet::

File > **Print Day Sheet** > click **Yes** when prompted

Bp Premier