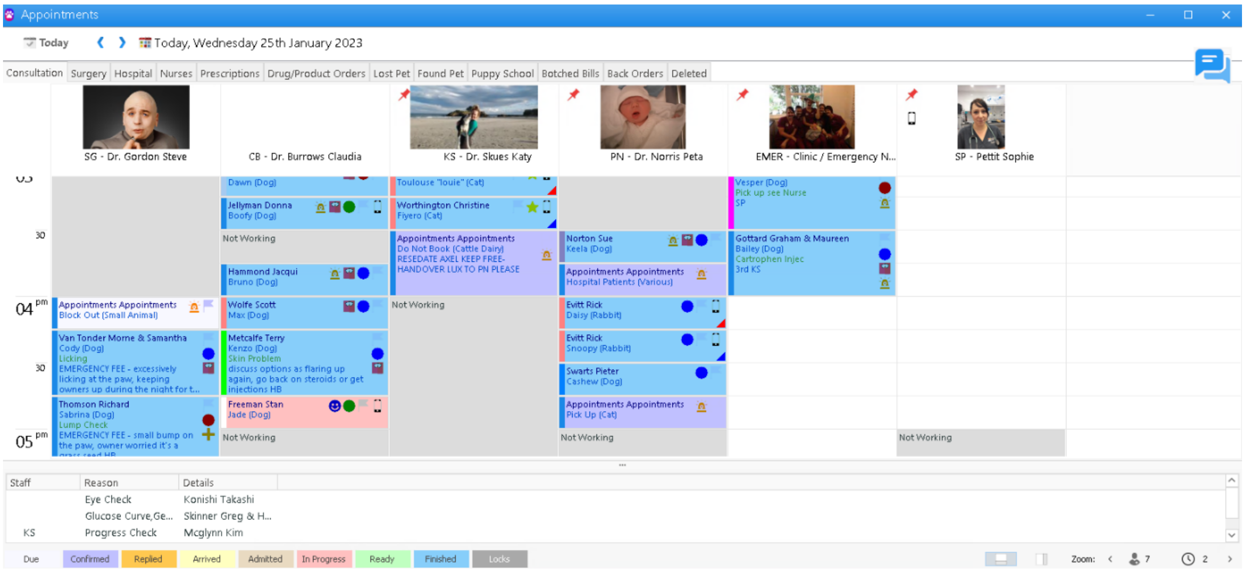
APPOINTMENT BOOK

GETTING AROUND THE DIARY

Overview



The Diary is used to create, view and edit appointments for clients and Patients. In VetlinkPRO you can have configure more than one diary into various types and formats including a list view.

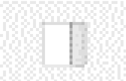
Diary Holding Tank

The holding tank is a temporary holding bay for any appointments that you wish to change to another day or diary. If you drag an appointment into the holding tank you can then search through other days or diaries to find a suitable time slot. When a time slot is found simply drag the appointment from the holding tank onto the diary using your mouse.

Staff	Reason	Details
	Eye Check	Konishi Takashi
	Glucose Curve,Ge...	Skinner Greg & H...
KS	Progress Check	Mcglynn Kim

Diary Tool Bar

The diary has its own diary toolbar which allows fast access to diary functions. Below is a description of this menu:

	Toggle Holding Tank to show along bottom of diary window.
	Toggle Holding Tank to show down side of diary window.
Zoom:	Shows zoom level options to scroll through
< >	Scroll through zoom options
6	How many vets/columns visible in diary.
2	How many hours is visible on diary screen at any time.

Diary Icons

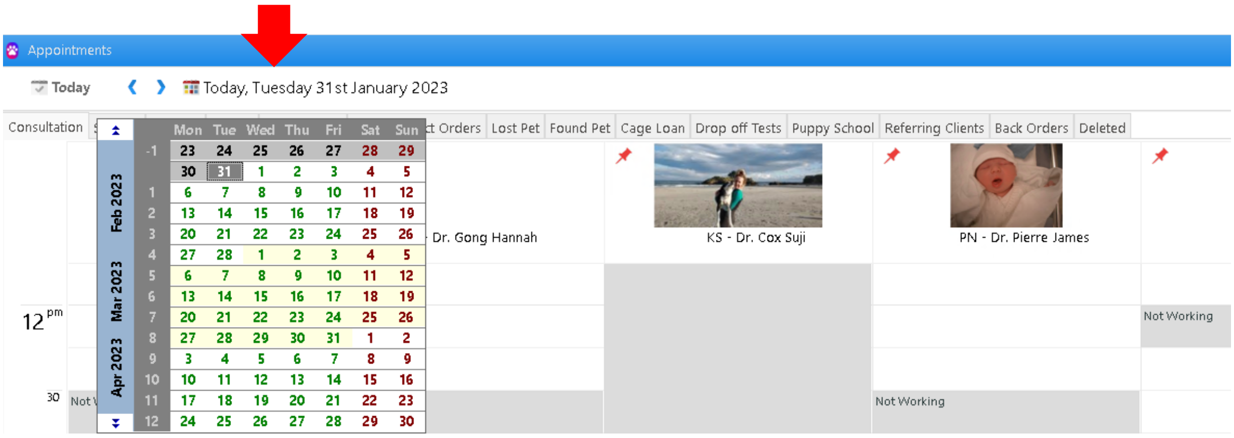
On diary appointments and in the billing window, icons provide information to the user about the client. Read below for a brief description of each icon.

	New Client - Shows when a client is new.
	Current Balance - Displays when the client has a balance outstanding in the current month.
30	**30 Day Balance** - Displays when the client has a balance in the previous month.
60	**60 Day Balance** - Displays when the client has a 60-day balance.
90	**90 Day Balance** - Displays when the client has a 90-day balance.
	Bad Debtor - Displays when the client has **'Stop Charge'** set on their client record.
	Not Seeing Requested - Displays when the client requested a staff member and did not get that staff member for the appointment.
	See Requested - Displays when the client got the staff member they requested.
	User Defined Flag – Displays a coloured flag identifying the custom group this client has been assigned to
	No Show – Displays when a client has a no-show (due) appointment on a previous date
	Sales Group – User defined sales group to identify client profit/sales.
	Weight – Show when the Patient has been weighed.
	Linked Appointment – Displays when an appointment is linked to another. The red triangle is the head while the blue is the tail. Clock to enlarge and identify the chain.
	Owner Waiting – If you have marked the appointment as 'Owner Waiting'. This patient will appear in waiting list.
	Text Message Reply – Signifies a text message has been received and not yet resolved.
	Room Selected – Displays when the appointment is also allocated to a room
	Appointment Transferred – Signifies that appointment has been transferred to another diary. E.g. Hospital or Surgery.

Diary Navigation

Navigation around the diary is controlled by the navigation tool bar. This toolbar consists of three or four buttons.

Prev Day: ❮	Allows you to scroll back in the diary day by day.
Next Day: ❯	Allows you to scroll forward in the diary day by day.
Today:	Takes you to the current day in the diary.
Date button:	When you click on the **'Date'** button a calendar opens where you can go to future or past days in the diary



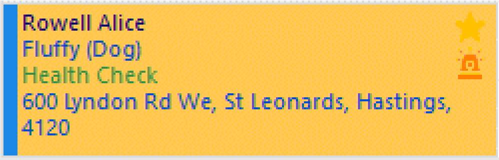
Appointment States

Each appointment on the diary will be colour coded to display the stage the appointment and billing process are up to. This makes it easy for the user to glance at the diary screen and instantly see the status of an appointment.

Due (White) – The client has not arrived or confirmed their appointment, and no bill has been started.

Confirmed (Purple) – The client has been contacted by phone, email or SMS and they have confirmed their appointment.

Replied (Orange) - The client has been sent a SMS which they have replied to with a message that is not **'Y'** or **'Yes'**. To view the reply, right click on the appointment and go to **'Email/SMS'** then **'Look at Reply'**.

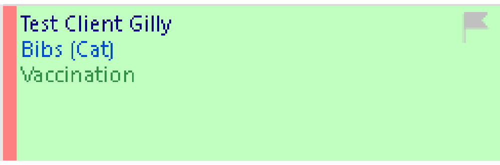


Arrived (Yellow) - The client has arrived in the clinic and is waiting to be seen.

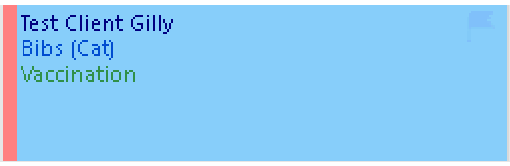
Admitted (Tan) - Patient has been admitted into surgery and waiting for Surgery to begin.

In Progress (Pink) - A bill has been started for this appointment and it is either still open or it has been saved and exited and marked as 'not ready' for reception.

Ready (Green) – The vet has finished adding the bill items but is still writing the clinical history. The bill has been marked as 'Ready' so reception staff can edit the bill and take payment.



Finished (Blue) - The client has been processed and the bill has been finished with a payment receipted.



Searching the Diary

Finding Free Appointment Slots

The **'Find Free Appointment Slot'** function helps find space in the diary where there are no bookings. For example, a client may need to get their dog vaccinated in the next two weeks before it goes into a boarding kennel. The clinic may be very busy at this time with very few free spaces. Instead of the Vet scouring the diary to find a free slot they can use the **'Find Free Appointment Slot'** function to do it for them.

1. Click on the **'Find Free Slot'** button from the diary ribbon at the top of the screen.

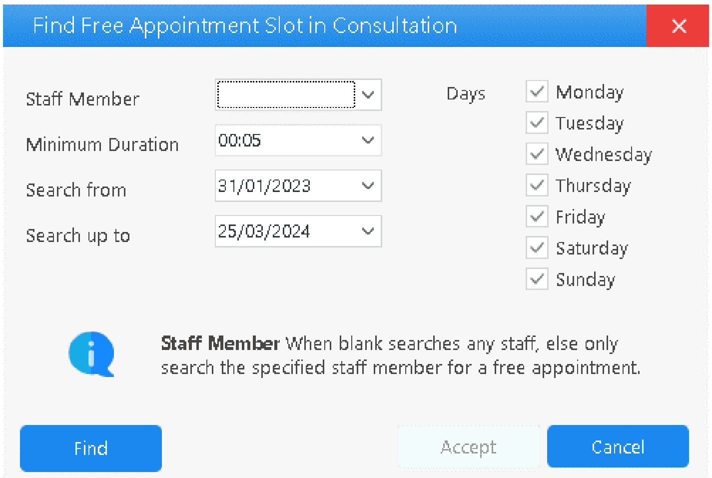
2. The **'Find Free Appointment Slot'** window will open.

3. Enter the parameters for which the appointment needs to satisfy. For example, the appointment must be within the next three weeks on any day, the client only wants to see JBR and half an hour is needed to do the vaccination.

4. Click **'Search'**.

5. The function will find the next available time slot that matches the search criteria. If the time slot is not suitable click on **'Find Again'** and the function will find the next time slot that matches the search criteria. You can keep searching until a suitable space is found.

6. Once a suitable space is found click on the **'Accept'** button and an appointment details form will open to make the appointment at that time.



Finding Client / Patient Appointments

1. Click on the **'Find Appointment'** button from the diary ribbon at the top of the screen.

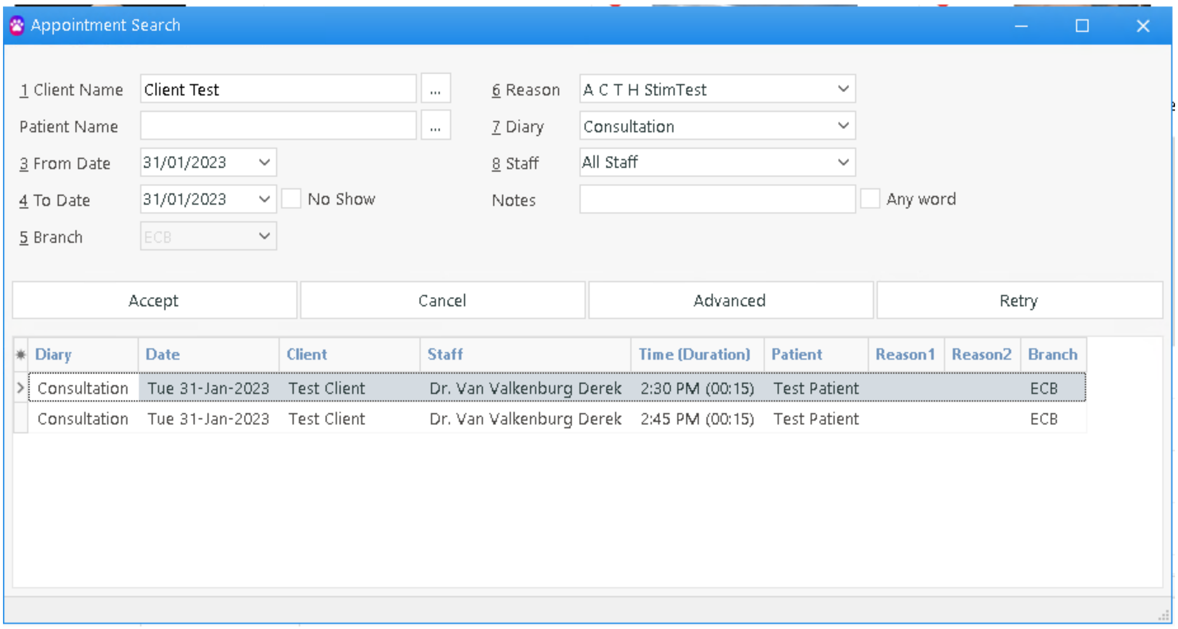
2. The **'Appointment Search'** window will open.

3. Enter your search criteria and click **'Search'**.

4. All the appointments matching your search criteria will be listed.

5. If you have found the appointment you were looking for select the appointment and click **'Accept'**, otherwise search again with new criteria.

6. You will now to taken to the appointment you have selected on the diary.



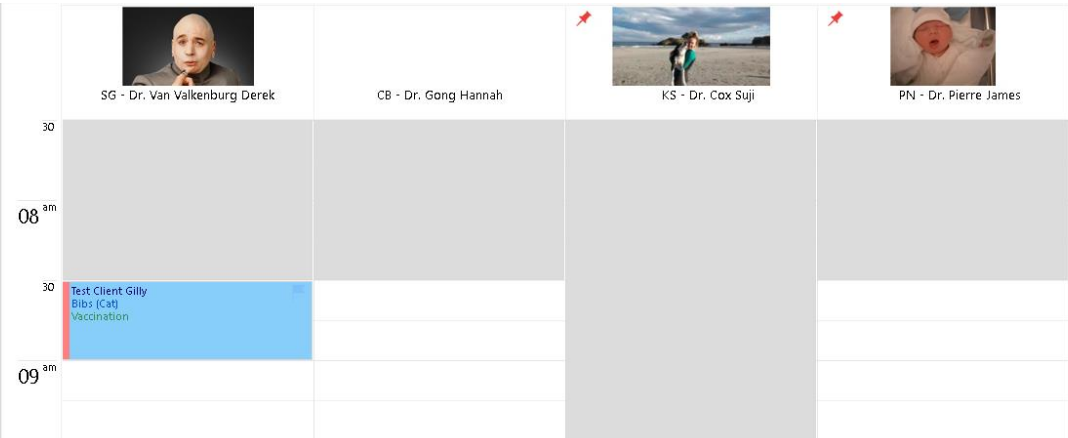
DIARY SETUP

Diary Profile

Diary Types

When adding a new diary page there are six diary types to choose from. Below is a brief description of each.

0: Normal: The normal diary shows appointments by time and staff member. This diary is typically used for consultations.



1: Num List: The 'Num List' diary displays appointments in a list format. Time and duration of the appointments are not used in this diary. This diary is typically used for your daily surgery lists.

	Client	Subject	Reasons	Staff	Notes	Cons. Staff	Owner Waiting
1	Tutt Carl	Nala (Female, Unknown) Dog, ...	Laparoscopic Spey,Nail clip		8am drop off est + info sent. patient at whanga...		
2	Wilding Hayley	Roxy (Female, Spayed) Dog, R...	Chemotherapy		8am admit SS. (C,RD)		
$ 3	Gardner Liz & Clayton	Roscoe (Male, Neutered) Dog,...	Chemotherapy		TBC GF. (l/m to confirm, 31/1/23, RD)		
4	Bolger Nolene	Cosmo (Male, Neutered) Dog,...	Ultrasound		8.15am admit. est and info sent. Abdo US and ...		

2: Day List: Not used.

3: DOW List: Not used.

4: Rollover: The **'Rollover'** diary is another list type diary like the **'Num List'**. The difference is this diary will roll over appointments from the previous day if they are **'Arrived'**, **'In Progress'** or **'Ready'**. This diary is typically used for Patients that are in the hospital.

5: Rooms: The **'Rooms'** diary shows appointments by time and staff member like the **'Normal'** diary. However a 'Room' button will also appear on the diary for you to check room bookings.

Creating a New Diary Page

1. Login with the highest access rights you have.
2. Go to the **'Options'** menu and then select **'Pick Lists Setup'**
3. Expand the **'Diary'** option and double click on **'Diary Profile'.**
4. A list of diary pages that have already been created will be displayed.
5. Double click on a line where the **'Dry_Name'** column is blank to open a diary profile window.
6. Enter the **'Name'** of the diary you are creating.
7. Select the **'Type'** of diary you want to create
8. Set **'Status'** to **'Active'**
9. Click **'Accept'** to save and exit the diary.

Default and Minimum Appointment Length

When you make an appointment in the diary, you can set a default appointment duration if the appointment duration isn't automatically entered by the reason. For example, if no reason was selected the system would automatically enter 15 minutes for the duration of the appointment, the user could then change this if they needed.

You can also set the minimum amount of time a user can set for an appointment. For example, you may have a policy of 15 minute consultations; you can set the minimum appointment length to 15 minutes so you don't get double booked accidently.

1. Login with the highest access rights you have.
2. Go to the **'Options'** menu and then select **'Pick Lists Setup'**
3. Expand the **'Diary'** option and double click on **'Diary Profile'.**
4. A list of diary pages that have already been created will be displayed.
5. Double click on the Diary you wish to edit.
6. If you wish to set the minimum appointment duration change the **'Min Apt'** field to suit. To change the default appointment length change the **'Def Apt'** field to suit.
7. Click **'Accept'** to save and exit.

Zoom Level Setup

The zoom level set up configures the number of hours and staff members that are displayed on the diary. There are five different zoom levels that can be configured. When the zoom button is pressed on the diary it will move to the next zoom level that has been configured.

1. Login with the highest access rights you have.
2. Go to the **'Options'** menu and then select **'Pick Lists Setup'**
3. Expand the **'Diary'** option and double click on **'Diary Profile'.**
4. A list of diary pages that have already been created will be displayed.
5. Double click on the Diary you wish to edit.
6. The zoom levels are displayed on the right hand side in the table.
7. Edit the zoom levels and click **'Accept'** to save and exit.

Zoom Level Setup

Num	Hrs	Staff
1	2	6
2	4	4
3	6	4
4	8	0
5	0	0

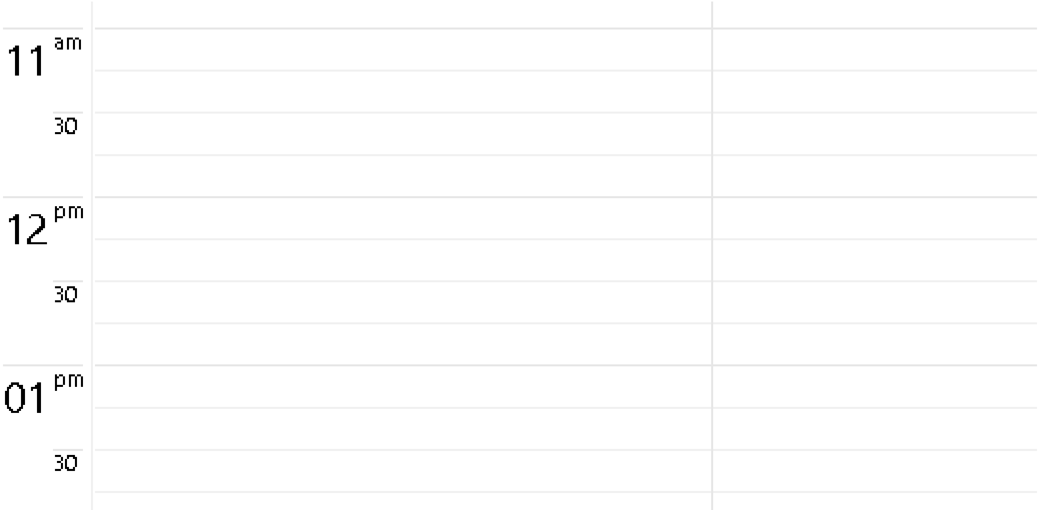
Customising Staff Order

You can order the staff members across the top of the diary in four methods. Numerically by staff number, alphabetically by the staff member's last name, alphabetically by staff ID or a user defined custom order. To edit the staff order follow the steps below:

1. Login with the highest access rights you have.
2. Go to the **'Options'** menu and then select **'Pick Lists Setup'**
3. Expand the **'Diary'** option and double click on **'Diary Profile'.**
4. A list of diary pages that have already been created will be displayed.
5. Double click on the **'Diary'** you wish to edit.
6. Change **'Stf Order'** to the method you wish to order staff.
7. If you selected custom click on the **'Order'** button'.
8. Add staff members to the diary by clicking on the **'+'** button and searching for the staff member.
9. You can easily change the staff order by editing the order #.
10. Click the **'Tick'** button to save and then the **'Exit'** button to exit the **'Custom Order'** screen.
11. Click **'Accept'** to save and exit.

Time Division Display

The **'Normal'** diary is displayed in units of time. The lines that are drawn on the screen to display time can be broken down into multiples of 5, 10, 15, 20 or 30 minutes. Please see below for example.



1. Login with the highest access rights you have.
2. Go to the **'Options'** menu and then select **'Pick Lists Setup'**
3. Expand the **'Diary'** option and double click on **'Diary Profile'.**
4. A list of diary pages that have already been created will be displayed.
5. Double click on the **'Diary'** you wish to edit.
6. Change **'Time Division Display'** to the method you wish to order staff.
7. Click **'Accept'** to save and exit.

Setting Up Multi-Book

Multi-book allows more than one appointment to be made for the same staff member in the same appointment block. For example, a client maybe bringing both their Patients in for a consultation. The vet may be able to see both Patients at the same time in the same 15 minute appointment block. With multi-book turned on, both Patients could be booked in with an appointment. When the Vet looks at the diary he will be able to see two Patients are coming in. (see **Error! Reference source not found.**)

1. Login with the highest access rights you have.
2. Go to the **'Options'** menu and then select **'Pick Lists Setup'**
3. Expand the **'Diary'** option and double click on **'Diary Profile'.**
4. A list of diary pages that have already been created will be displayed.
5. Double click on the **'Diary'** you wish to edit.
6. Change **'Num Apt / Time Slot'** to the number of appointments you wish to be able to book at the same time for a vet.
7. Click **'Accept'** to save and exit.
8. Open the staff record of the staff member you wish to enable multi-book for.
9. Go to **'8: Stf' | 'Roster'**.
10. For the rosters / days you wish to enable multi-book, place a tick in the **'Multi-Book'** column.
11. Click the **'Tick'** to save and close the staff record.

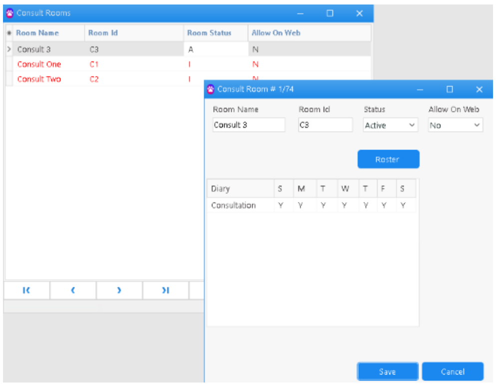
Setting Up Rooms / Equipment Diary

Some clinics may require equipment to be booked out when a consult is made. Booking out the equipment will ensure nothing is double booked.

1. Login with the highest access rights you have.
2. Go to the **'Options'** menu and then select **'Pick Lists Setup'**
3. Expand the **'Diary'** option and double click on **'Diary Profile'.**
4. A list of diary pages that have already been created will be displayed.
5. Double click on the **'Diary'** you wish to edit.
6. Change the **'Type'** to **'Rooms'.**
7. If a room must be selected for each appointment made, set **'Room is Required'** to **'Yes'**. If a room is only required sometimes set **'Room is Required'** to **'No'**.
8. To add your new room types click on the **'Rooms'** button and then on the **'+'** at the bottom of the new window.
9. Enter the details of the room you are creating.
   a. **Name:** The room name, e.g. 'X Ray Room'
   b. **ID:** A short ID for the room, e.g. 'X1'
   c. **Status:** Enables or disables the room to be used.
   d. **Room#:** The room number, E.g. the X Ray room is room number '1'.
10. Click **'Accept'** to save and exit.
11. Save and exit the Room List window.
12. Click **'Accept'** to save and exit.

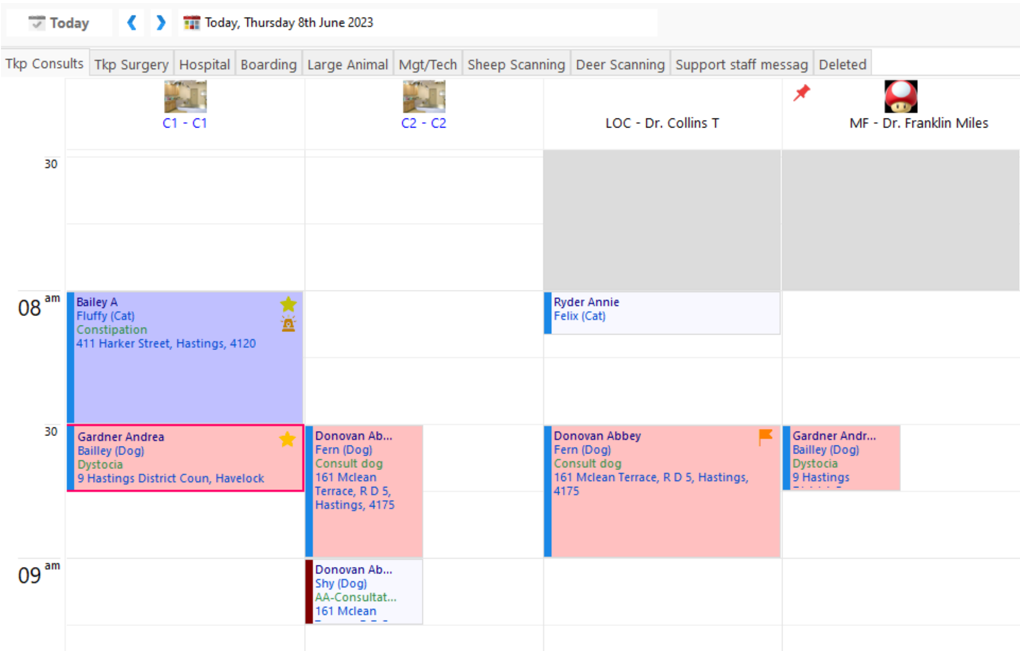
Setting up Consult Room Columns

VetlinkPRO allows users to create bookings for consulting rooms or rural areas etc. rather than individual staff members. This means that you can make bookings to a 'room' without selecting a staff. When you start a consult/billing it will prompt you to enter your ID.



1. Login with the highest access rights you have.
2. Go to the **'Options'** menu and then select **'Pick Lists Setup'**
3. Expand the **'Diary'** option and double click on **'Consult Rooms.**
4. Click '+' to add a new consult room.
5. Give the Consult Room a name and ID.
6. Assign the roster exactly as you would for a normal staff member.

NOTE: Staff are still required to be added to the diary but can be out of view if you wish. When the appointment is picked up from the room column and the staff member is selected, the appointment is copied to the staff member's column. This allows users to look back historically at the diary to see who performed a consult. Secondly, staff selection maintains accurate data calculation for the staff productivity report.



Diary Reasons

Creating a New Diary Reason

Diary Reasons are used when making an appointment to show what the appointment is about. The diary reason can be linked to a SERVICE so it is automatically billed when the bill is started. To create a new diary reason follow the steps below.

1. Login with the highest access rights you have.
2. Go to the **'Options'** menu and then select **'Pick Lists Setup'**
3. Expand the **'Diary'** option and double click on **'Diary Reasons'.**
4. A list of diary reasons that have already been created will be displayed.
5. Click on the blue **'+'** button at the bottom of the page to create a new reason and select **'OK'** to the insert new record prompt.
6. Enter a **'Name'** for the appointment reason and change **'Status'** to **'Active'**.
7. If you wish to link it to a service click on the **'Add New Product'** button and choose the service you want.
8. Click **'Accept'** to save and exit.

Setting the Duration of Diary Reasons

To make entering appointments a faster and more streamlined process you can assign default durations to appointment reasons. This will ensure staff members do not waste time entering the duration details and remembering how long an appointment will take.

1. Login with the highest access rights you have.
2. Go to the **'Options'** menu and then select **'Pick Lists Setup'**
3. Expand the **'Diary'** option and double click on **'Diary Reasons'.**
4. A list of diary reasons that have already been created will be displayed.
5. Double click on the reason you wish to edit.
6. Change the **'Duration'** to suit
7. Click **'Accept'** to save and exit.

Assigning Colours to Diary Reasons

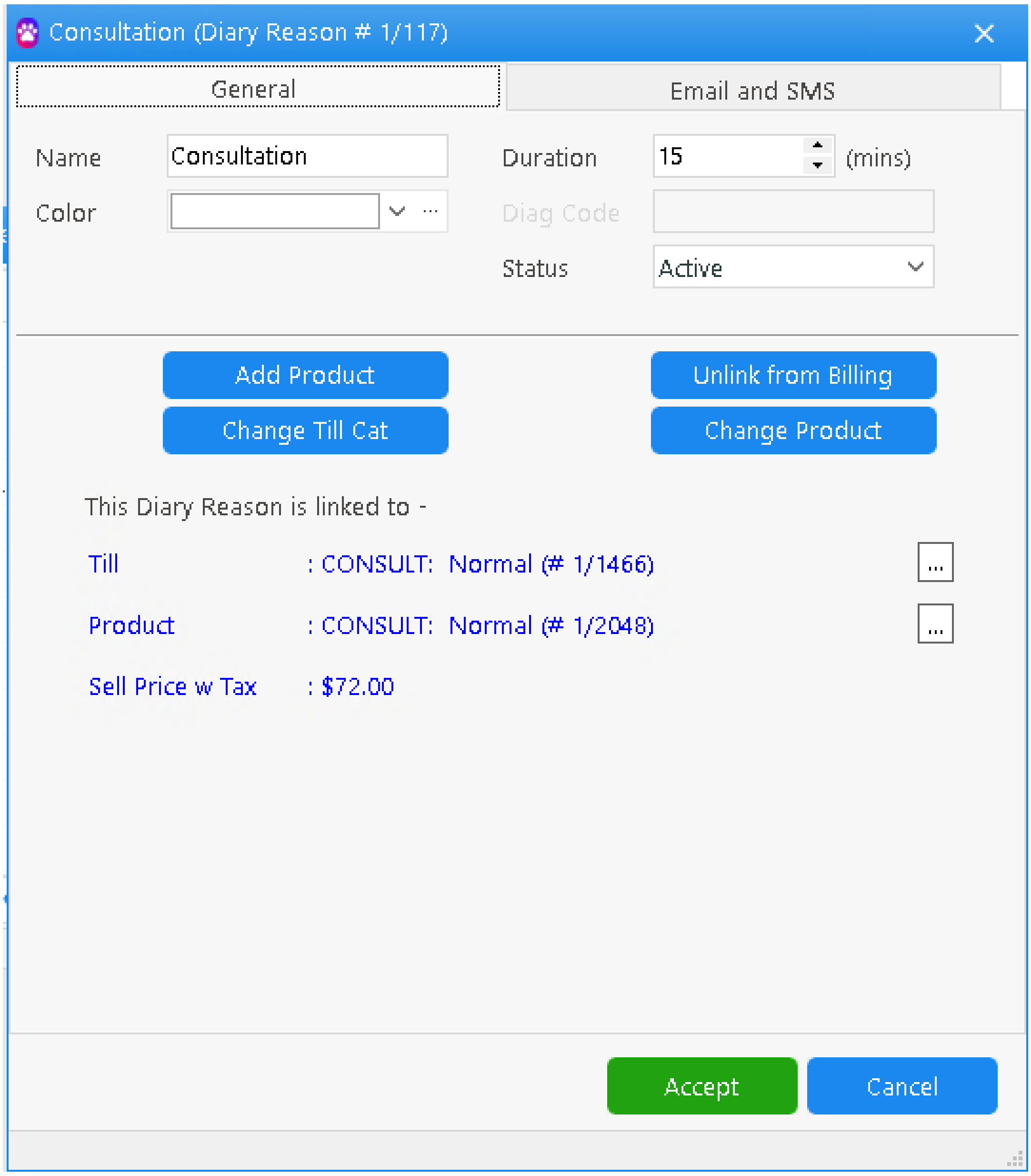
To assist staff members in quickly gauging what type of appointments reasons are in the diary, colours can be assigned to reasons. It is recommended that only the important reasons are coloured coded to avoid confusion. Follow the steps below to assign colours to appointment reasons.

1. Login with the highest access rights you have
2. Go to the **'Options'** menu and then select **'Pick Lists Setup'**
3. Expand the **'Diary'** option and double click on **'Diary Reasons'.**
4. A list of diary reasons that have already been created will be displayed.
5. Double click on the reason you wish to edit.
6. Click on **'Colour'** and select a colour from the palette then click **'OK'**.
7. Click **'Accept'** to save and exit.

Assigning Reason Specific Appointment Reminders

Different appointment types can have specific reminders sent when sending appointment reminders for future dates.

1. Login with the highest access rights you have
2. Go to the **'Options'** menu and then select **'Pick Lists Setup'**
3. Expand the **'Diary'** option and double click on **'Diary Reasons'.**
4. A list of diary reasons that have already been created will be displayed.
5. Double click on the reason you wish to edit.
6. Click on **'Email and SMS'**
7. Tick the check box next to the type of reminder you would like to be used instead of the default (Email or SMS).
8. Click **'Standard'** or **'Telemed'** for the type of appointment you would like the new reminder to apply to.
9. Enter the text for the reminder and click **'OK'** to save.
10. Click **'Accept'** to save and exit.


Consultation (Diary Reason # 1/117)
General
Email and SMS
Name
Consultation
Duration
15
(mins)
Color
Diag Code
Status
Active
Add Product
Unlink from Billing
Change Till Cat
Change Product
This Diary Reason is linked to -
Till : CONSULT: Normal (# 1/1466)
Product : CONSULT: Normal (# 1/2048)
Sell Price w Tax : $72.00
Accept
Cancel

Business Hours

Staff members and appointments can only be added to the diary between the scheduled shop hours. Follow the instructions below to change the shop hours.

1. Log in with your user ID and password.
2. Click on **'Options'**, then select **'Pick Lists Setup'**.
3. From the pick lists double click on **'Diary'** then double click on **'Business Hours'**.
4. This will open the '**Business Hours'** form. From here you can edit any of the shop hours which are in 24 hour format.

Holidays

Setting Up a New Holiday

1. Login with the highest rights you have.
2. Go to the **'Options'** menu and then select **'Pick Lists Setup', e**xpand the **'Diary'** option and double click on **'Holidays'**. **OR** Open the diary and click on the **'Holidays'** button in the ribbon at the top of the screen.
3. A list of holidays that have already been created will be displayed.
4. Click the red **'+'** symbol to add a new holiday.
5. Enter the **'Name'** and **'Date'** of the holiday and set the **'Status'** to **'Active'**.
6. Click the **'Tick'** button in the bottom right-hand corner of the window, then click **'OK'** to save the changes.

Editing the date of the Holiday

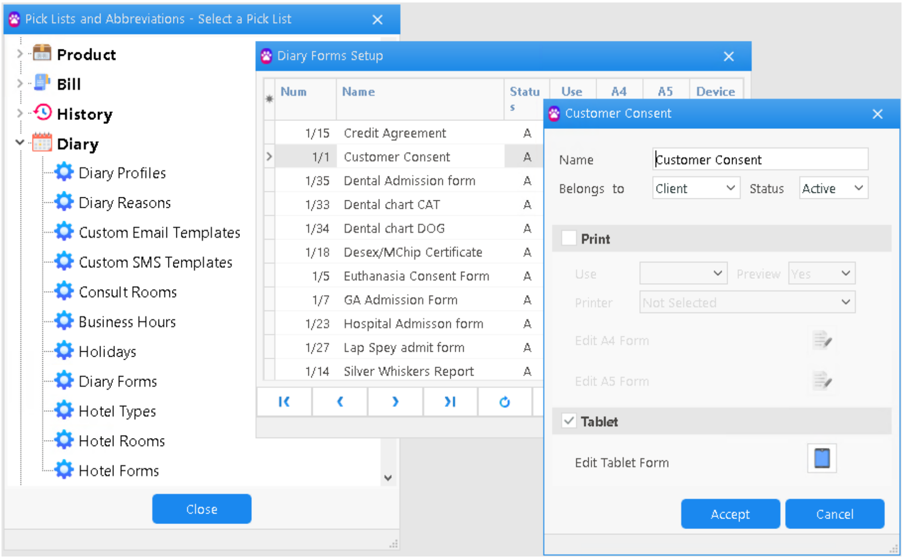
If the holiday is already entered but is for a previous year just click on the date and select the correct date from the calendar.

Notes on Creating Holidays

If there are any appointments already booked on the selected date, the system will not allow you to activate the holiday, but will display a warning informing you of the number of appointments found on that day. You will need to move all appointments from that day to another day before you can activate the holiday, once you have activated the holiday, close the application and restart. You will no longer be able to make appointments on that day. If you look at the day in the diary, you will notice the text of the date has changed to a dark red, and the name of the holiday is listed in brackets immediately after the date.
To allow an appointment to be created on a holiday, you will have to mark the holiday as **'Inactive'**. Simply follow the instructions listed above to get back to the Holiday List.

Diary Forms

The printed diary forms can be found under **Options | Picklists | Diary | Diary Forms** or **History Forms**. From here you can rename the form so it displays as you like, add more forms if required and turn on **Preview** if you want the ability to edit a form before printing. An e-Form / tablet option has also been added here as described in the next section



Printing a Client Form

1. Right click on a client's appointment and choose **'Print Forms / History'**.

2. From the pop-up box choose which form you wish to print.

E-Forms

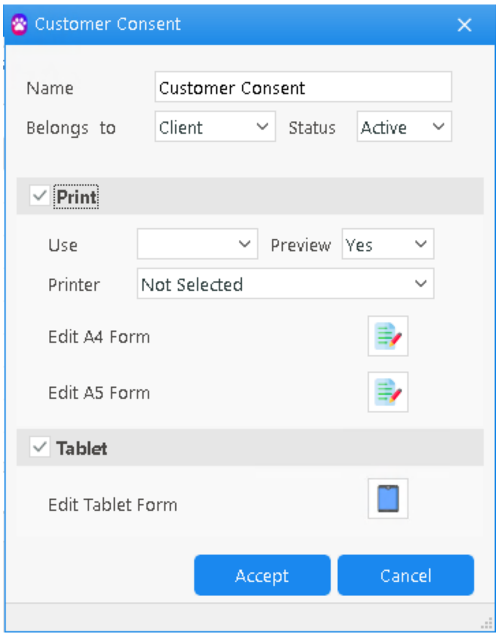
Diary e-Forms are electronic forms that can be sent off an appointment in VETLINKPRO [**Right click -> Fill on Tablet**] to an Android or Apple Tablet. Clients can then review, accept and sign directly on the device. These forms are then automatically filed back in VETLINKPRO over Wi-Fi to create a fully paperless office for the likes of Consent and Account Application forms. A number of e-form templates are included as examples which can be customised by users to suit your business. CFL can also design forms on a chargeable basis. Alternatively you or your web designer could do it noting that some HTML knowledge is required.

E-forms Setup

Note: We recommend an iPad for running VETLINKPRO e-Forms. There is also an Android version available on Google Play, however as Android makes and models differ greatly we can't guarantee compatibility on older devices or less well known brands. The app will not work on landscape devices either. We highly recommend "name brand" portrait devices such as Samsung, LG etc. If in doubt please contact CFL for Android device recommendations.

1. Ensure VETLINKPRO is upgraded to version 4.9 and CFL staff have installed services.

2. Enable / Edit / Add e-Forms from **Options | Picklist Setup | Diary | Diary Forms** …
   a. Select where you wish the completed form to be saved. Either Client Document Manager, Patient Document Manager or in the Clinical History for that Patient.
   b. Merge fields exist in the editor for Insert Signature, Text Box and Mandatory Check box.



3. Insert your Clinic logo and set the colour theme from **Options | Setup | Misc | Colour Themes | Set Logo**

4. Find either the local or external IP address of your server and open ports in firewall. Your hardware tech may need to do this.

a. **External IP address:** (Allows e-forms to be used on outside the clinics network as long as your external IP is a Static IP address)
   i. Go to www.whatismyip.com
   ii. Your external/public IP address should be prominently displayed on this page.
   iii. Make sure port 8086 inbound is open in the windows firewall or any other software firewall on the server.
   iv. Ensure port 8086 inbound is forwarded to the server in your router.

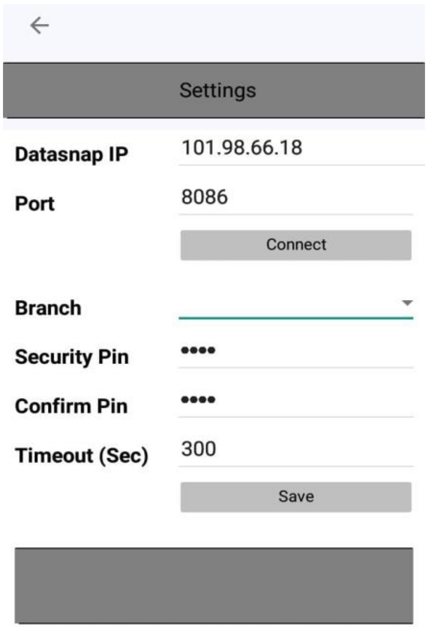
b. **Local IP address**: (e-Forms can only be used while on the clinics network)
   i. Click on the Start menu and type cmd.
   ii. When you see the **cmd** applications in Start menu panel, click on it to open.
   iii. A command line window will open. Type ipconfig and press enter.
   iv. Look for "IPv4 Address" or “IP Address” The number across from that text is your local IP address.
   v. Check with your Hardware tech to ensure the local IP is a static IP address.
   vi. Make sure port 8086 inbound is open in the windows firewall or any other software firewall.
   vii. You'll see a bunch of information, but the line you want to look for is "IPv4 Address" or “IP Address” The number across from that text is your local IP address.
   viii. Make sure port 8086 inbound is open in the windows firewall or any other software firewall.

5. Enter your External IP address and port in VetlinkPRO Setup. **Options | Setup | Misc | Internet Cont | DataSnap Details…**

6. Download VETLINKPRO e-Forms from the Apple or Android store.

7. When installing app enter **IP address** and **branch** when prompted and click **connect**.

8. Next select your **branch**, choose a **password**, enter a **timeout** period and click save.



Using e-Forms

1. From VETLINKPRO diary right click on an appointment and choose **Fill Form on Tablet**.

2. Form will be available on all tablets with e-Forms.

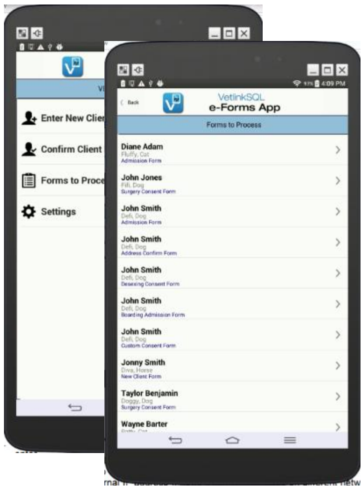
3. You may wish to Confirm Client Details first. If details change they will be sent back to VETLINKPRO. The form will need to be resent from VETLINKPRO however for the new details to show correctly on the tablet form.

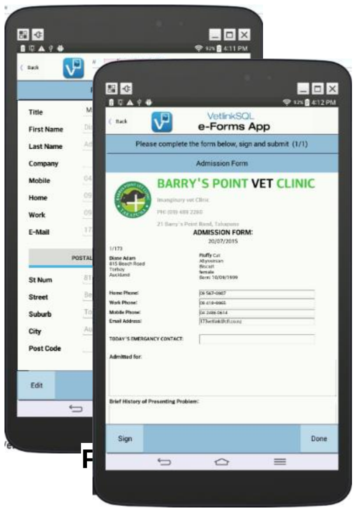
4. Click **Forms to Process** then enter your security pin.

5. Select the form you wish to process and hand the tablet to the client.

6. Clients can confirm or edit their details. Please note that any changes will NOT show on the client's form that has been synced. To show changes you will need to re-sync.

7. Client can complete, confirm and sign form.





8. After clicking **Done** and the tablet is handed back to staff a prompt will ask the staff to review the form to ensure it is filled in correctly.

9. If the form is correct the staff member can click submit.

10. Enter your security pin to verify a staff member has checked the form.

11. The form will be transferred to VETLINKPRO as a PDF to the location specified in the configuration

NOTE: Client details can also be synced to the tablet from the **Action menu** at the bottom of the **Client record**. Details can then be confirmed on the tablet by clicking Confirm Client Details.

ADJUSTING STAFF ROSTERS

Adding Staff on a Non-Rostered Day

The diary automatically adds staff members to the diary using a staff members roster on their staff record. Occasionally, a staff member may come into work on a non-rostered day and therefore will not have a column on the diary. You can use the **'Add Staff'** to add the staff member onto a single day. To do this follow the steps below.

1. Go to the day you want to add the staff member to.
2. Go to **'Staff' | 'Add Staff'** in the ribbon at the top of the screen.
3. Search for the staff member you wish to add and click **'Accept'**.
4. The staff member will be added to the diary. Blue manual locks will appear in place of the normal **'Not Working'** times. If the staff member's roster is updated to be working for this day, the manual locks will override the roster.

Altering Staff Hours on a Single Day

The background processor will periodically check the staff roster on the staff record and allocate the diaries based on that. If you move the grey **'Not Working'** times on the diary, when the background allocates the roster it will change the **'Not Working'** times back to whatever is in the roster. To alter the hours when a staff member works overtime or starts late you need to change the grey **'Not Working'** times to blue manual locks.

1. Find the day in the diary you wish to extend the staff members hours for.
2. Right click on a staff members **'Not Working'** time and select **'Change to Manual'**.
3. The **'Not Working'** Times should turn blue. Using your mouse drag the 'Not Working' times to the hours you wish.

NOTE: When they diary allocates the staff rosters the **'Not Working'** times in blue will not be moved.

Diary Locks

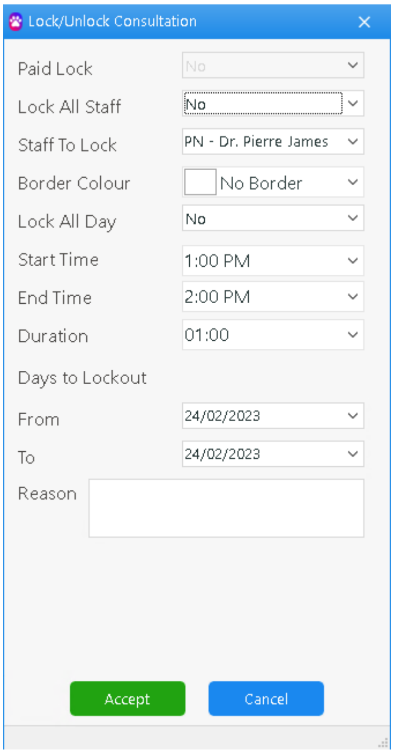
The lock function allows you to lock out time slots so appointments cannot be made at those times. This is handy for entering lunch breaks, training time and meetings. Your clinic can assign colours to locks so identification can be made easier.

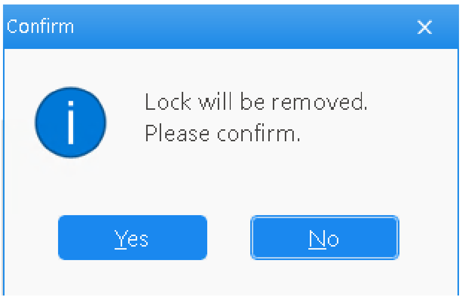
Adding a New Lock

1. Right click on the diary on the time you want to lock from and select **'Lock'**.
2. Enter the required details and press **'Accept'**.
3. A lock will appear on the diary for the times requested.

Removing a Lock

1. Right click on the lock you wish to remove. And select **'Unlock'**.
2. Click **'Yes'** to remove the lock.



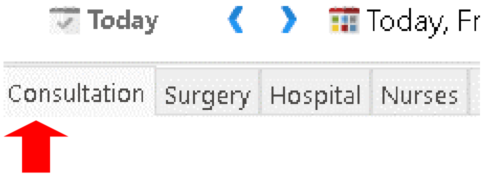


APPOINTMENTS

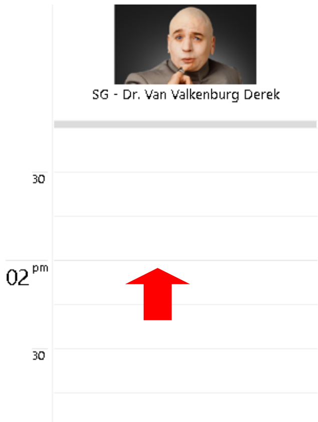
Booking an Appointment

1. Click the **'Diary'** button to open the diary.

2. Select which diary you wish to make the appointment in, E.g. 'Consultations'.



3. With your mouse, double left click on the time and the staff column you wish to make the appointment for. E.g. 2:00pm with Dr. Derek.



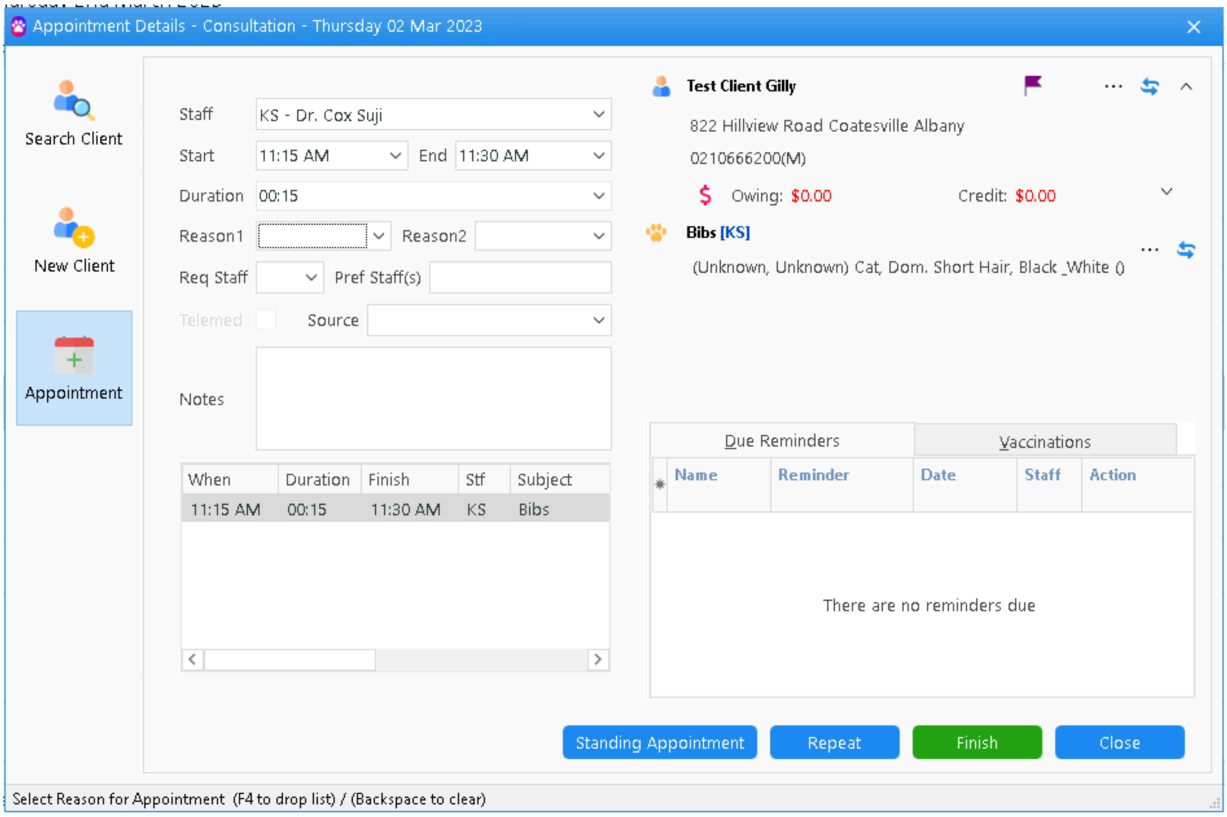
4. Search for the client you wish to make an appointment for or click on the **'New'** button to add a new client.

5. Search for the Patient you wish to make an appointment for or click on the **'New'** button to add a new Patient.

6. When you have selected the correct client and Patient the appointment details window will open. Fill in the details as required, then click **'Finish'** to complete the appointment.

Staff:	This is the staff member who you are booking the appointment for. This is automatically selected when you double click on a staff member's appointment column. You can change this by using the drop-down box.
Start & End Times:	These are defaulted to the time that you have selected when creating the appointment in the diary. The times are automatically updated when you select an appointment reason. For example, a de-sex appointment may take one hour, so selecting this as a reason may change the duration of the appointment to one hour. Appointment time/length can be manually changed from the drop-down list of times as well.

Duration:	This is the duration for the appointment. The duration will be automatically calculated from the start and end times. You can also manually change the duration using the drop-down list and when you do, it will change the end time of the appointment.
Reasons:	This will show a drop-down list of all the different reasons for an appointment. These reasons can then be linked to a till category and a service will be automatically entered onto the bill when the bill is created.
Req / Prf Staff:	Requested or Preferred Staff member. This can be selected if the client requested a particular staff member
Client:	Clicking on the client button will allow you to change the client that the appointment is for.
Subject:	Clicking on the subject button will allow you to change the Patient that the appointment is for.
Telemed:	If you have telemedicine set up for the selected staff member you can select if the appointment is a telemedicine consult.
Source:	How the appointment was made.
Notes:	This is a free typing field where you can enter in any other details you wish to record about the appointment.
Client Details:	This displays the current details on the client file. You may click the ··· button if any of these details are not correct to update them. You can also change the client if it is incorrect by selecting the  button.
Client Account details:	This displays the current balance of the client's account, with a breakdown of where they may be overdue.
Animal Details:	This displays the current details on the animal file. You may click the ··· button if any of these details are not correct to update them. You can also change the animal if it is incorrect by selecting the  button.
Reminders / Vaccinations:	Displays reminders that are due or all the vaccinations that have been done for all Patients owned by that client.


Appointment Details - Consultation - Thursday 02 Mar 2023
Search Client
New Client
Appointment
Staff
KS - Dr. Cox Suji
Start
11:15 AM
End
11:30 AM
Duration
00:15
Reason1
Reason2
Req Staff
Pref Staff(s)
Telemed
Source
Notes
When
Duration
Finish
Stf
Subject
11:15 AM
00:15
11:30 AM
KS
Bibs
Test Client Gilly
822 Hillview Road Coatesville Albany
0210666200(M)
Owing: $0.00
Credit: $0.00
Bibs [KS]
(Unknown, Unknown) Cat, Dom. Short Hair, Black _White ()
Due Reminders
Vaccinations
Name
Reminder
Date
Staff
Action
There are no reminders due
Standing Appointment
Repeat
Finish
Close
Select Reason for Appointment (F4 to drop list) / (Backspace to clear)

How to Change Appointment Details

Appointments can only be changed if they are still in the Due state, white colour. If an appointment is confirmed or arrived you will need to unconfirm or unarrive the appointment before proceeding with the changes. Using the “drag and drop” facility it is easy to make changes to appointments.

Change Details

To change any appointment details double click on a Due appointment to open up the appointment details form. You can change any details relating to the appointment from here.

Change assigned staff member

The appointment can also be moved between staff members. To do this click on the appointment and drag it to another staff member while holding down the mouse button.

Change appointment time

To change the time of the appointment click and drag the appointment to a new time while still holding down the mouse button.

Changing appointment duration

Changing the appointment duration can be done by moving the cursor over the bottom edge of the appointment. The cursor will change to a double headed arrow. You can now make the appointment duration longer or shorter while still holding down the left mouse button.

Transferring appointments

To transfer an appointment from one day to another, click on the appointment and drag it to the holding tank, then navigate to the day the appointment is to be transferred, and drag the appointment from the holding tank to the selected time slot.

How to Confirm and Unconfirm an Appointment

Confirming an appointment means the client has been contacted and the appointment has been confirmed by the client.

Confirming an Appointment: Right-click on the appointment and select **‘Confirm’**. The appointment will change to a purple colour to indicate it is confirmed.

Unconfirming an Appointment: Right-click on the appointment and selecting **‘Unconfirm’**.

Appointments can also be confirmed via SMS. For more details on confirming appointments using this method, refer to the section on “Sending Appointment Confirmations” later in this chapter.

Appointment Conflicts List

If an appointment is added that is unable to fit in the required space, you can be prompted to place it in the **Conflict List Diary**. While it is in the **Conflict List** you can then check the diary for a space to fit it into. If you select the appointment and press **Enter** on your keyboard you can use the plus and minus buttons to change the duration to fit it into a free space better. **Note:** Appointments must be moved from the Waiting List Diary before any other diary functions can be used.

This option can be enabled or disables from **Options | Setup | Diary | Diary Options | Use Conflicts Diary**.

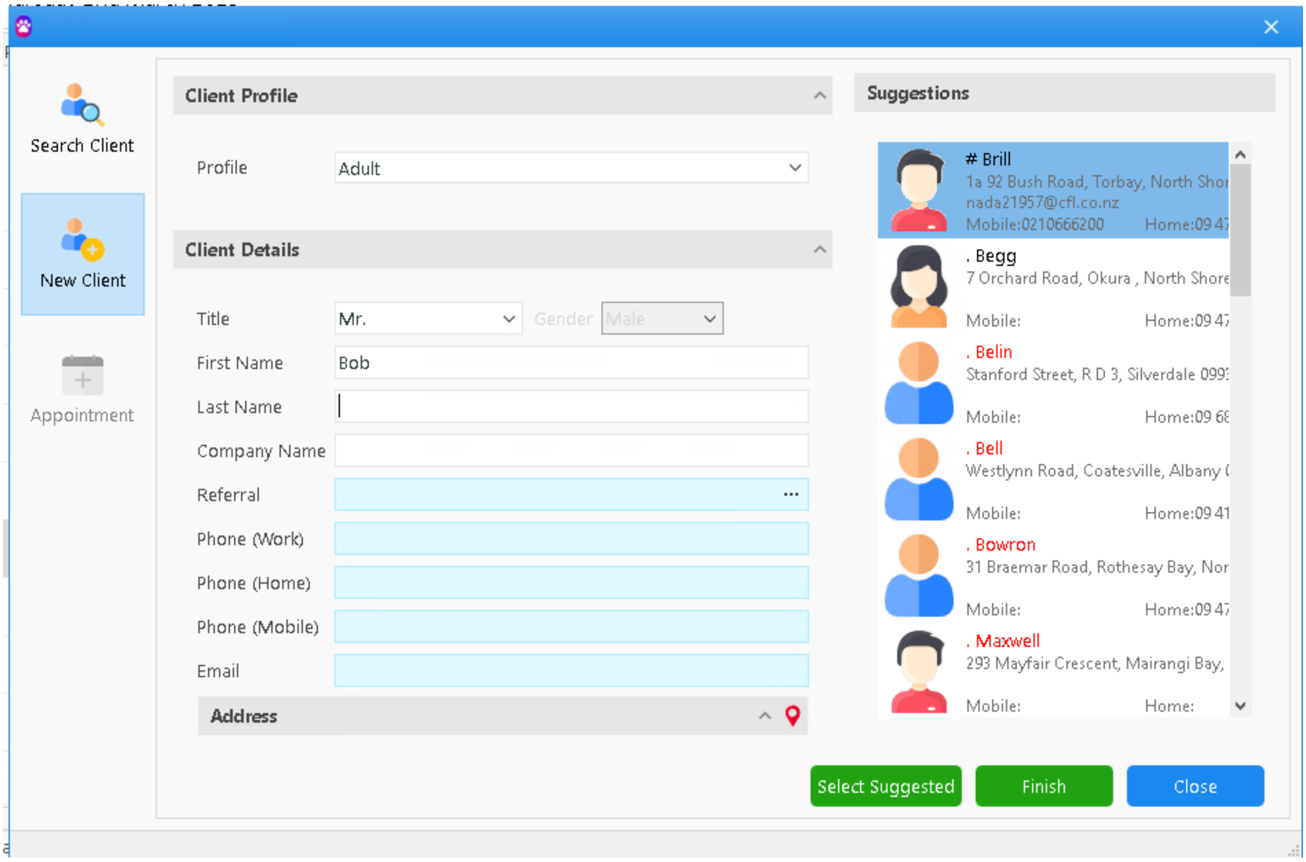
Minimal Entry New Client Form

The minimal client entry form is used for entering new clients from the Diary and can be enabled from **Options | Setup | Diary | Diary Options | Minimal Entry for new clients**. The form has fewer fields and ensures that before the new client can be saved, staff have entered a name and one form of contact.

You can also make it compulsory for staff to add the referral method. This can be enabled from **Options | Setup | Client | Options | Use Referral | Referral is Compulsory.**

Referral types can be set up from **Options | Setup | Client | Referrals** and are customisable by the user.

TIP: The minimal client entry form can also be configured to check if the new client may be a duplicate. You can enable this from **Options | Setup | Diary | Diary Options | Check if New Cln already in Database**.

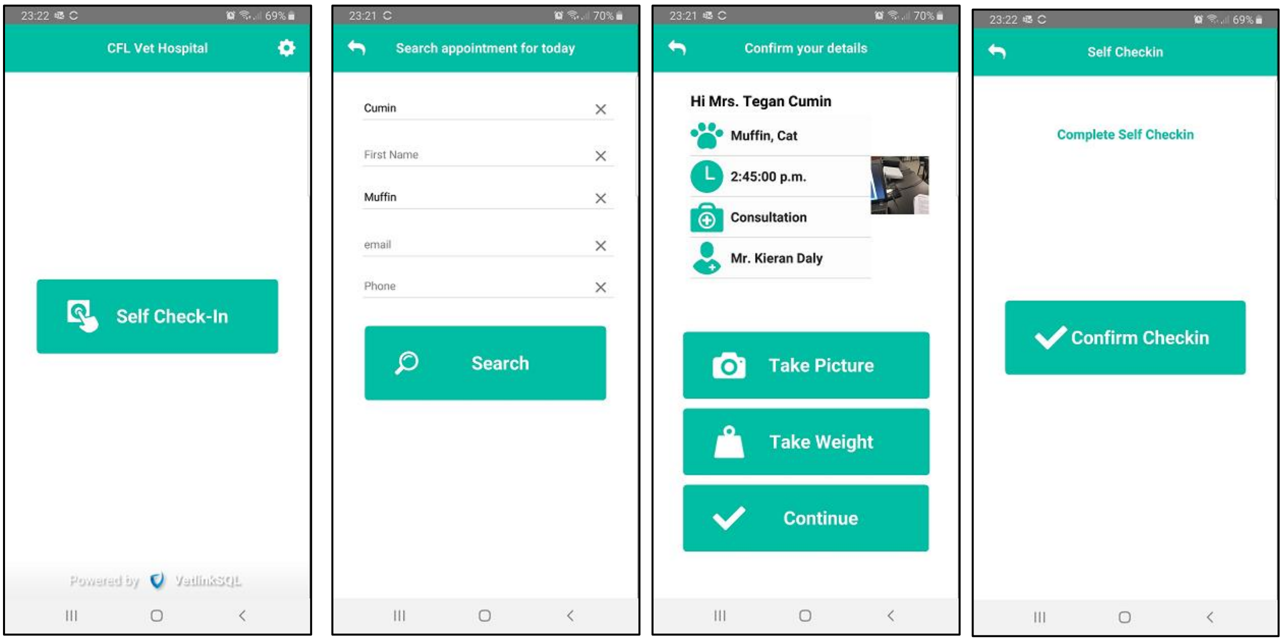


Checklink

Checklink is a mobile app which is available for clients to self-check-in. The app can be downloaded to an Android or Apple tablet. Clients arriving at the clinic can then use the tablet to find themselves and check themselves in. Checking in will arrive the client/patient in the diary in VetlinkPRO.

The app also allows clients to take a picture of their pet or enter the weight. These options are controlled by a setup option in the app to turn on or off.

Checklink is an extra module so please contact sales@vetlinkpro.com to enable and setup.



STANDING APPOINTMENTS

Standing appointments are appointments that are repeated at regular intervals. For example, a vet may make a farm call to a particular stud every Monday at 1pm. Instead of entering every appointment individually or copying appointments and dragging them from the holding tank, VetlinkPRO can automatically enter these for you.

Examples of Using Standing Appointments

Standing appointments can be used for many different types of appointments and has been designed to save time by removing the need to copy an appointment to the holding tank and drag each appointment to a different day in the diary. Some examples of how standing appointments may be used are listed below:

- An Patient may come in regularly every second week for a treatment that will last a prescribed number of visits into the future, e.g. cancer patient.
- A vet may make a farm call to a particular farm on the first Monday of every month. By using standing appointments with an indefinite time span the appointment will be made automatically and reduce the chance of another staff member accidently booking a different appointment into that time slot.
- Standing appointments can also be used for staff scheduling. For example, you may have a staff meeting on the first Monday of every month. Please note; such appointments may skew information in some reports such as Staff Productivity report, No Show report, and other diary reports.

TIP: As standing appointments are automatically scheduled in advance they are best utilised in conjunction with the appointment confirmation feature by SMS, Email or phone. By sending an appointment confirmation message clients will not forget they had appointments booked in advance.

How to Access Standing Appointments

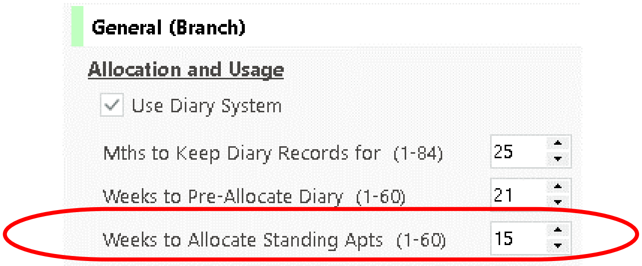
There are several ways of accessing the standing appointments window:

- From Client screen, click the ‘Actions’ button then ‘Standing Appointment’ menu option
- From Patient screen, click the ‘Actions’ button then ‘Standing Appointment’ menu option
- From Diary screen, right click an existing appointment then click the ‘Standing Appointment’ menu option.

Setting up Standing Appointments

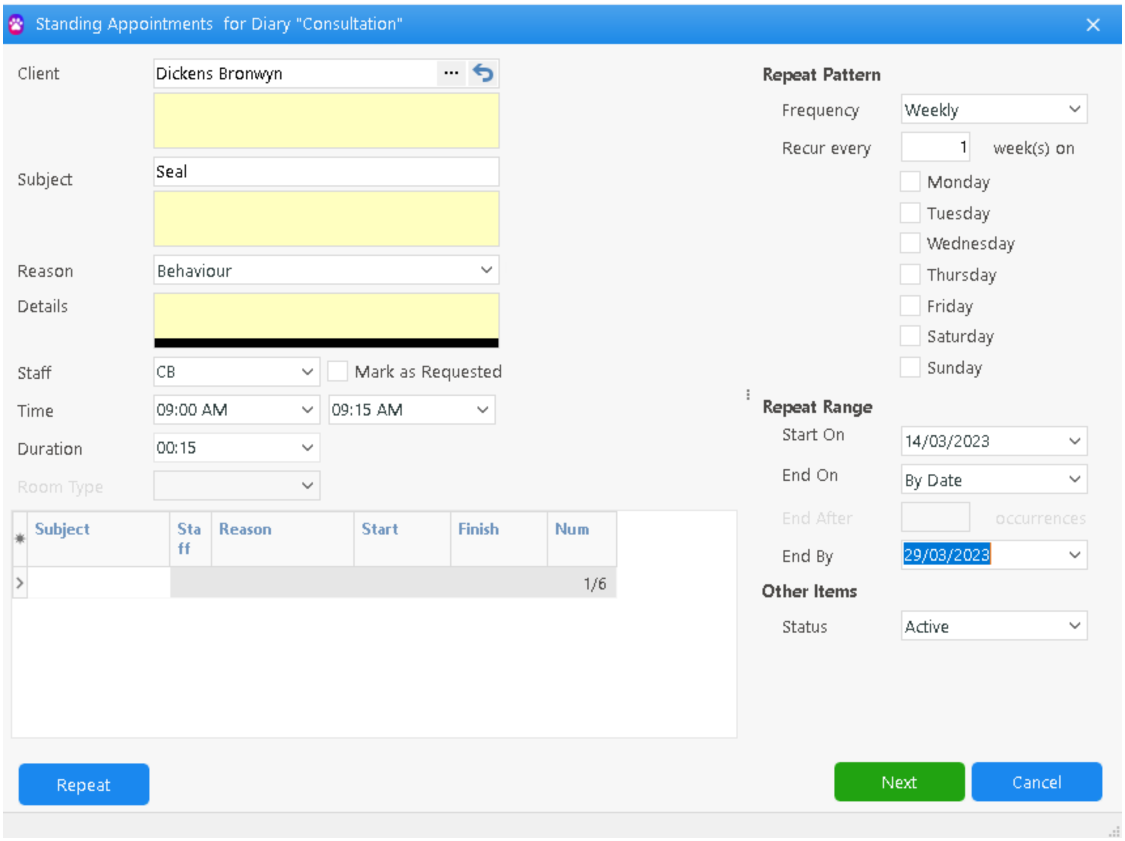
Before using standing appointments, you must set up how far ahead you would like VetlinkPRO to generate the scheduled appointments. To do this, in VetlinkPRO go to **Options | Setup | Log In | Diary |** enter the number of weeks to allocate ahead in ‘**Weeks to Allocate Standing Apts (1-60)’.**

NOTE: The number of weeks to allocate standing appointments should **NOT** exceed the number of weeks to pre-allocate diary.



The Standing Appointment Details Window

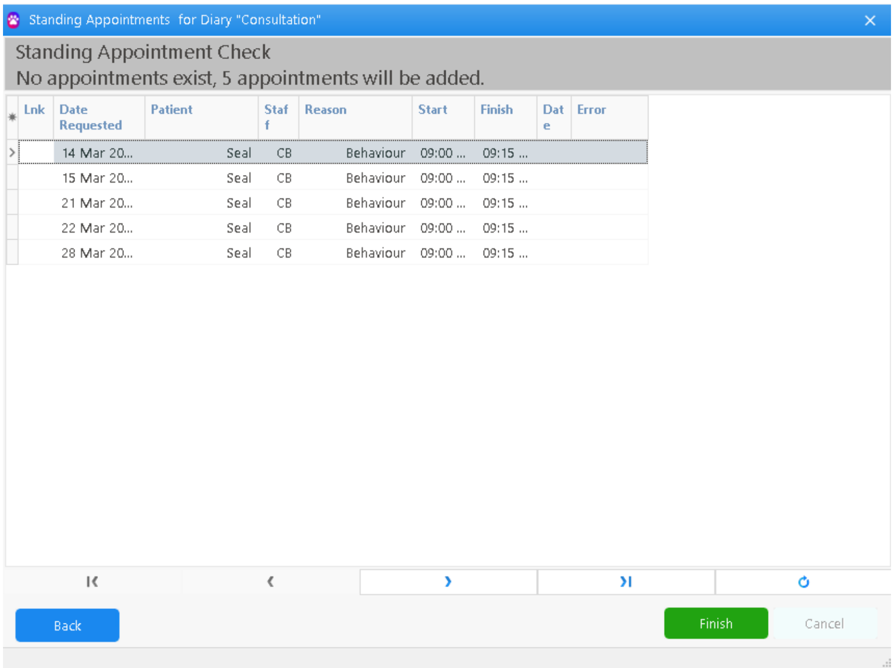
The left hand side of the form is the same as the normal appointment details screen. The right hand side of the screen contains details for the standing appointment.



Repeat Pattern	
Frequency	
Daily:	An appointment will be generated every day.
Weekly:	An appointment will be generated each week.
Day of Month:	An appointment will be generated each month following the start on date.
1st Weekday of Month:	An appointment will be generated on the first week of the month
2nd Weekday of Month:	An appointment will be generated on the second week of the month.
3rd Weekday of Month:	An appointment will be generated on the third week of the month.
4th Weekday of Month:	An appointment will be generated on the fourth week of the month
Yearly:	An appointment will be generated each year following the start on date.
Recur Every:	Based on the frequency, appointments will be generated at the interval set in the **'Recur Every'** field. For example, if **'Frequency'** was set to **'Week'** and **'Recur Every'** was set to "2", appointments would only be generated every second week.
Repeat Range	
Start On	The date on which appointments will start being allocated.
End On	The date on which appointments will no longer be allocated. You are able to choose from three selections:
Never Ends:	Appointments will continually be generated.
After Count:	Appointments will be entered until the number entered in the **'End After'** field is reached.
By Date:	Appointments will be generated until the **'End By'** date is reached.
Other Items	
Status	While the standing appointment still needs to be allocated this needs to be set to **'Active'** otherwise to stop allocation set to **'Inactive'**.

Creating a New Standing Appointment

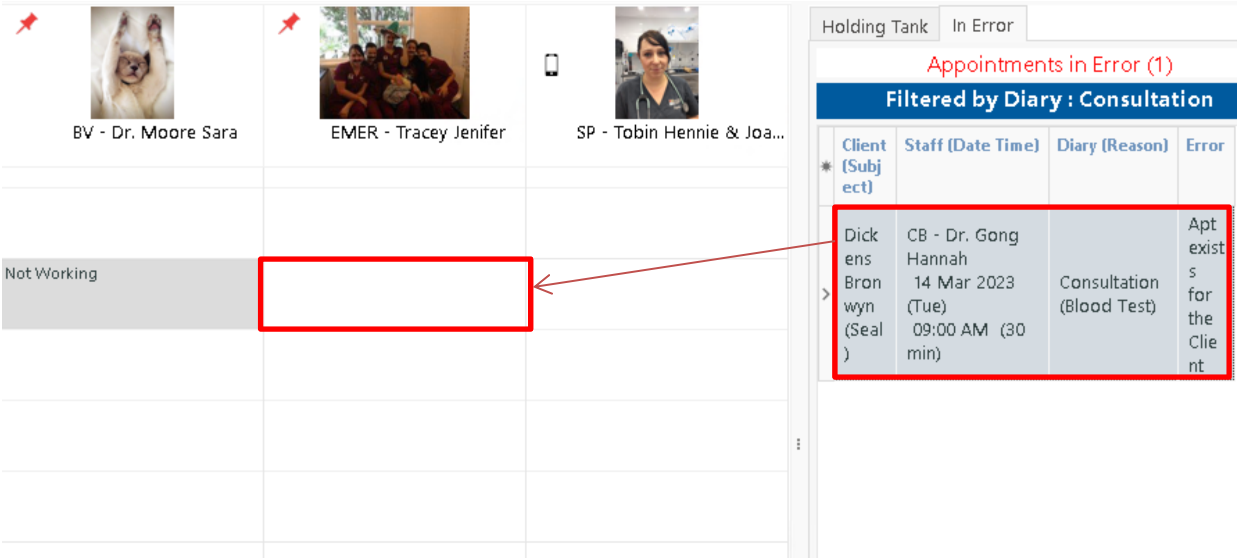
1. Search for and open a client or Patient record.
2. Click on the **'Actions'** button and select **'Diary'** then **'Standing Appointments'**.
3. The Standing Appointments window will open. This window will list all the current standing appointments. If there are no current standing appointments it will be blank.
4. Click on the blue **'+'** button at the bottom of the window and the appointment details window will open.
5. Enter the details for the appointment. The left hand side of the form is the same as the normal appointment details screen. The right hand side of the screen contains details for the standing appointment.
6. Click on the **'Next'** button and the appointments will be generated. The system will check for existing future appointments as well.
7. VetlinkPRO will now produce a list of all the future appointments. Check the appointment details and then click on the **'Finish'** button.



8. A warning prompt will appear. Read it and click **'Yes'** to continue.
9. If the allocation was not successful you will be asked if you would like to correct the errors now.
10. Click **'Yes'** to correct the errors.
11. A list of all the appointments in error will be displayed. To correct an appointment double click on the appointment in error. This will change the diary to the appointment date.

12. At this stage you may need to move appointments or alter the roster. To cancel an appointment move it to the **'Deleted'** diary.

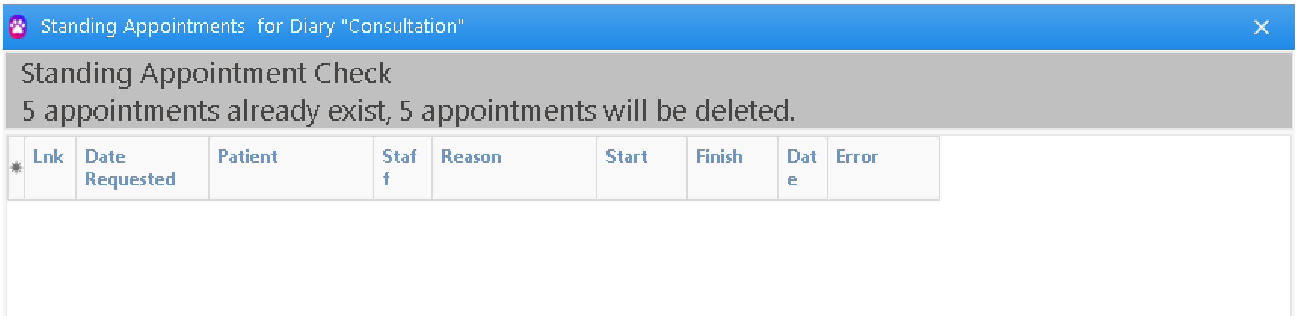
13. Next drag the appointment onto the diary to the position you want it.



14. Once all the appointments in error have been cleared close the error window.

Deleting Standing Appointments

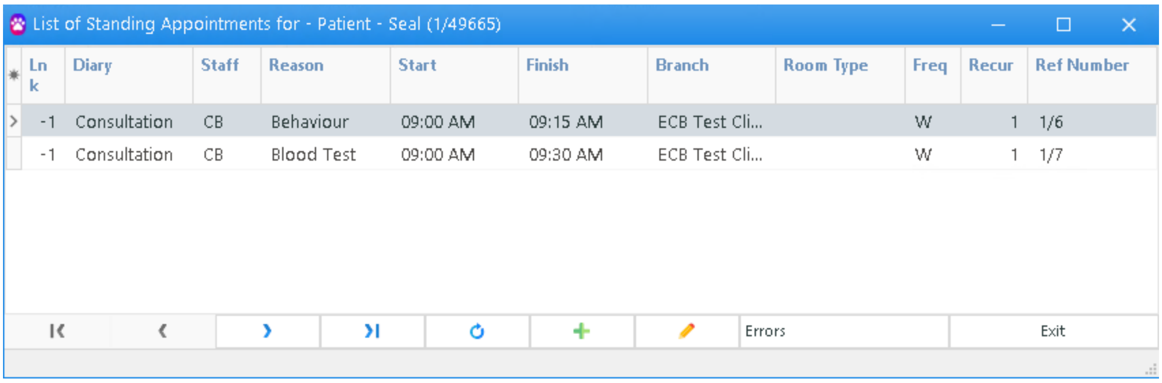
1. Search for and open a client or Patient record.
2. Click on the **'Actions'** button and select **'Standing Appointments'**.
3. The Standing Appointments window will open. This window will list all the current standing appointments.
4. Double click the standing appointment you wish to move.
5. Set the **End On** field to **By Date**.
6. Set the End By field to today's date.
7. Click on the **'Next'** button and a list of appointments to be removed will be generated.
8. Click Finish and Appointments will be removed.


Standing Appointments for Diary "Consultation"
Standing Appointment Check
5 appointments already exist, 5 appointments will be deleted.
Lnk
Date Requested
Patient
Staff
Reason
Start
Finish
Date
Error

Editing & Checking Existing Standing Appointments

Once the standing appointments have been created and added to the diary they function in the same manner as any other appointment. You can double click on it to change the appointment details or use the mouse to stretch or drag it.

To edit all the remaining standing appointments open the Patient record and select standing appointments from the actions tab. Double click on the standing appointments schedule you wish to edit and the appointment details screen will open. Make any changes as necessary.



Any changes made to the schedule will affect appointments already made, this may result in the deletion of existing appointments and creation of new ones.

Examples:

- To Stop a Standing Appointment Schedule – Changing the ‘End By Date’, any appointments after the new date will be removed.

- To Change the Day of Week – In the Standing Appointment details screen change the day of the week, the appointments will be moved to the newly selected day. Similarly changing the Start Time will move the appointments to the new start time.

Error Handling

Errors may occur when generating appointments, these are presented in a separate page, **'Appointments in Error'**. Errors may be accessed from the Dairy screen by expanding the **'Holding Tank'**, right click on the holding tank > left click on **'Expand Form'** > when the Holding Tank is displayed, left click on the **'In Error'** tab.
The table below describes errors that may be presented after creating or amending standing appointment schedules.

Error Details	Explanation
Not Open on Day	Business closed
Outside Work Hours	Business hours do not extend as far as the requested appointment time
Time Slot Not Available	Appointment slot is already booked
Room Not Available	Selected room already booked - when using the rooms/resources type diary
Conflict with Lock	The appointment slot has been locked (manual lock)
Conflict with Appointment	Another appointment already exists in the requested time slot
Number of Slots Exceeded	No available appointment slots – when using multi booking
Holiday	Day marked as a holiday – business closed
Staff Not Working	Staff not available in diary
Apt exists for the client	An appointment is already made on that day

In case of errors, you may do one of the following:

- Cancel the appointment by moving to the 'Deleted' diary page
- Move the appointment to an available appointment slot
- In cases where the staff is not on the appointment diary you may add the staff column manually using the 'Staff' button in the Diary screen
- In case where the appointment falls outside the normal staff hours, you may choose to make a one off change to the staff roster. First change the roster to a manual roster by right clicking on one of the 'Not Working' blocks in the staff column, click on **'Change To Manual'**, now stretch the not working blocks to accommodate for the appointment. Move the appointment to the appropriate slot.

ARRIVALS

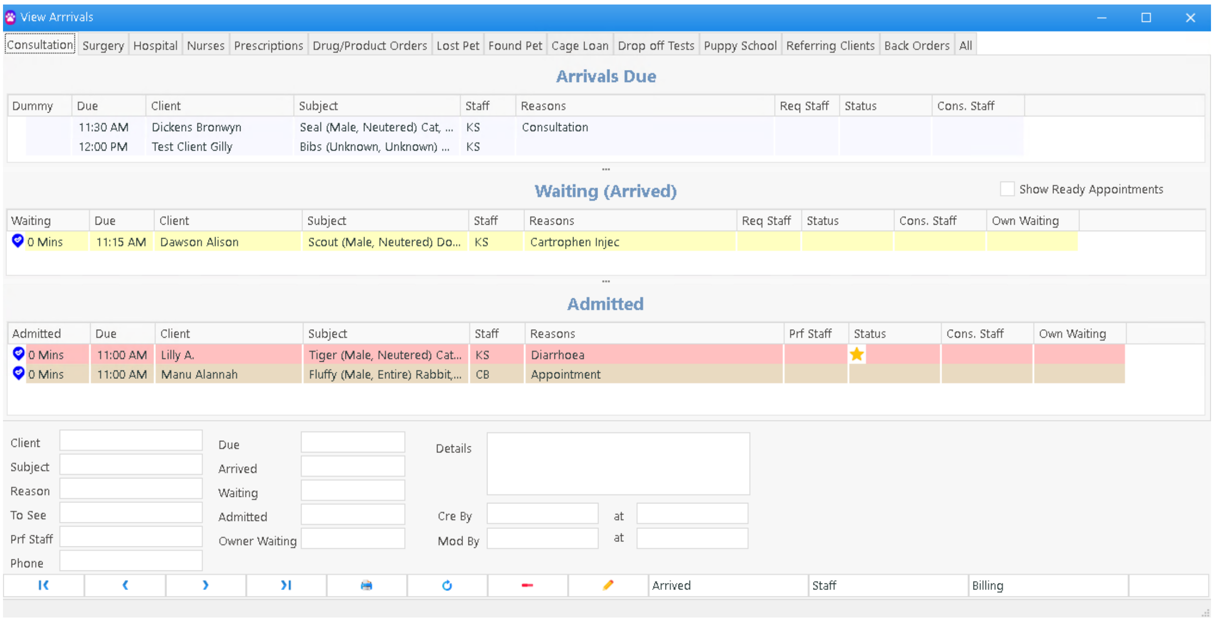
Managing Arrivals

The arrivals diary is generally used in the consulting room to show vets what appointments they are booked into see. When you select an appointment all the appointment details are shown in the bottom section of the window.

The **'Arrivals Due'** section shows what appointments have not arrived yet.

The **'Waiting (Arrived)'** section shows what patients have arrived and are waiting in the clinic. A timer would also start at this stage to tell the vet how long the client has been waiting.

The '**Admitted'** list shows patients that have been admitted or where the consult is currently in progress.



The **'Arrivals'** diary can be used for each diary that you have set up. Change the diary by clicking on the tab at the top of the screen. If you wish to view all diaries click on the **'All'** tab.

By default, the **'Arrivals'** diary will not show **'Ready'** appointments. Tick the **'Show Ready Appointments'** check box if you would like these to display in the **'Arrivals'** diary as well.

A right click option from the appointment in both the arrivals and diary screens will let staff set when the owner arrives to pick up a Patient and then show how long the owner is waiting to pick up their Patient. A **Waiting** column in the arrivals screen will show how long the owner has been waiting for.