Patient appointment checklist

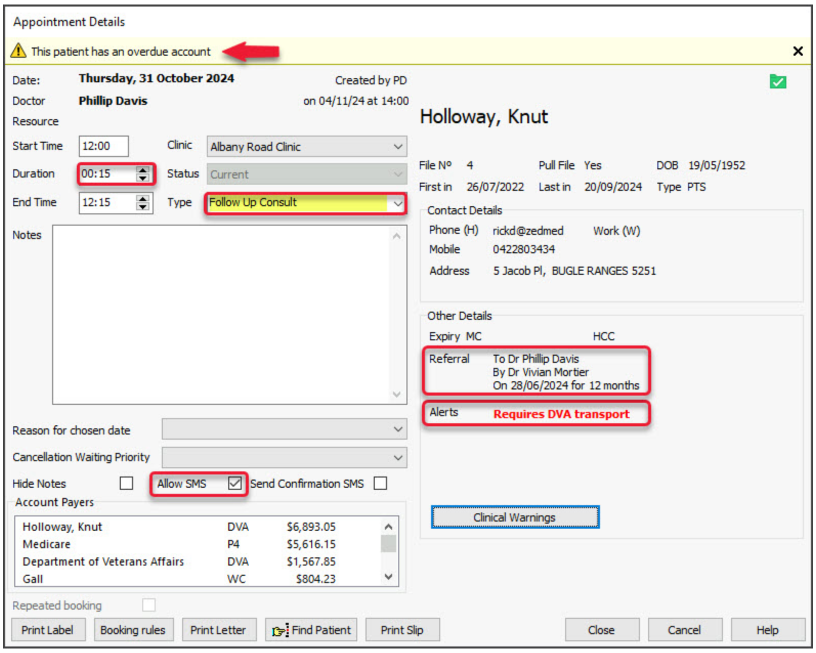
Last Modified on 21/11/2024 9:26 am AEDT

What to check in the appointment and patient record when making a booking.

What to check in Appointment Details

Double-click the patient's booking to open the **Appointment Details** screen and check.

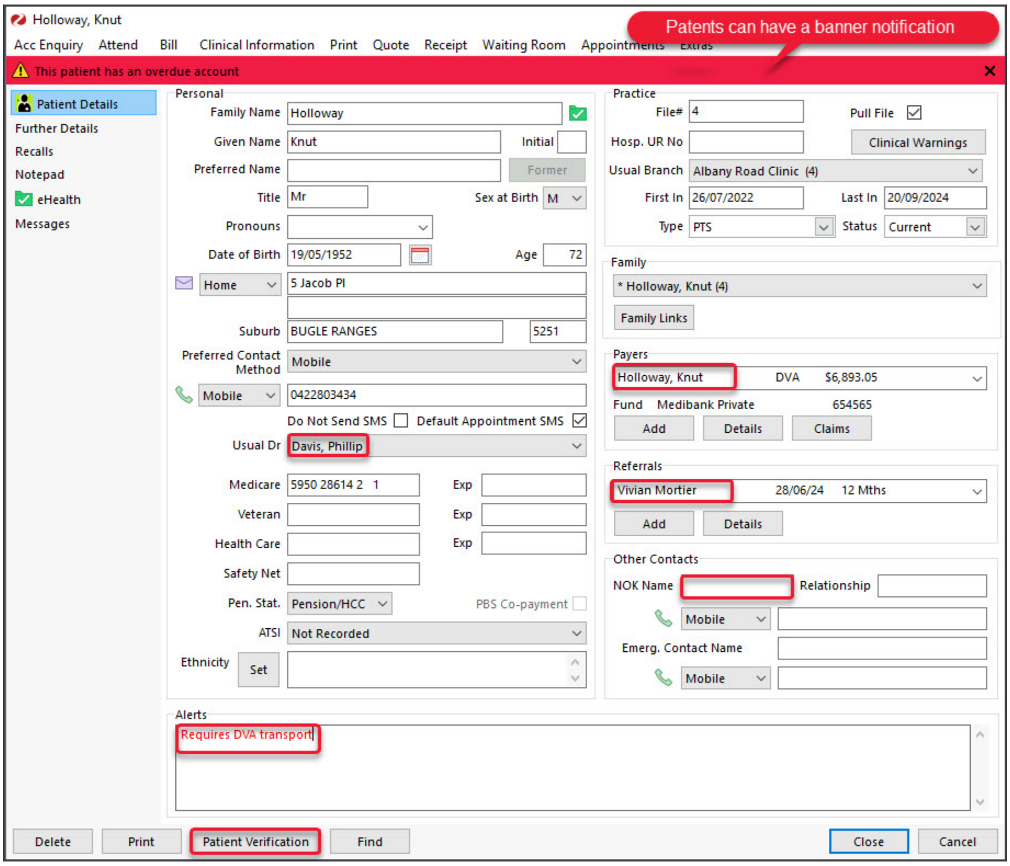
- The appointment **Duration** is correct for the appointment **Type**.
- Check that **Allow SMS** is ticked.
- Some patients may have a **Referral** or **Alerts** noted.
- There may also be a notification banner.



Patient Details

From the Appointment book, right-click the patient and select **Patient Details**, and check that:

- Check there is a **Usual Dr** selected.
- Select the **Patient Verification** button to verify the status of their claim.
- Check the patient is a **Payer** is the payer.**
- Check the **Alerts** field for next of kin information and add it to the **NOK Name** field with their phone number.
- Check there is a **Referral** and the most recent is attached. Update it if required.



Holloway, Knut
Acc Enquiry
Attend
Bill
Clinical Information
Print
Quote
Receipt
Waiting Room
Appointments
Extras
Patents can have a banner notification
This patient has an overdue account
Patient Details
Further Details
Recalls
Notepad
eHealth
Messages
Personal
Family Name
Holloway
Given Name
Knut
Initial
Preferred Name
Former
Title
Mr
Sex at Birth
M
Pronouns
Date of Birth
19/05/1952
Age
72
Home
5 Jacob Pl
Suburb
BUGLE RANGES
5251
Preferred Contact Method
Mobile
Mobile
0422803434
Do Not Send SMS
Default Appointment SMS
Usual Dr
Davis, Phillip
Medicare
5950 28614 2 1
Exp
Veteran
Exp
Health Care
Exp
Safety Net
Pen. Stat.
Pension/HCC
PBS Co-payment
ATSI
Not Recorded
Ethnicity
Set
Practice
File#
4
Pull File
Hosp. UR No
Clinical Warnings
Usual Branch
Albany Road Clinic (4)
First In
26/07/2022
Last In
20/09/2024
Type
PTS
Status
Current
Family
* Holloway, Knut (4)
Family Links
Payers
Holloway, Knut
DVA
$6,893.05
Fund
Medibank Private
654565
Add
Details
Claims
Referrals
Vivian Mortier
28/06/24
12 Mths
Add
Details
Other Contacts
NOK Name
Relationship
Mobile
Emerg. Contact Name
Mobile
Alerts
Requires DVA transport
Delete
Print
Patient Verification
Find
Close
Cancel