

Patient appointment checklist

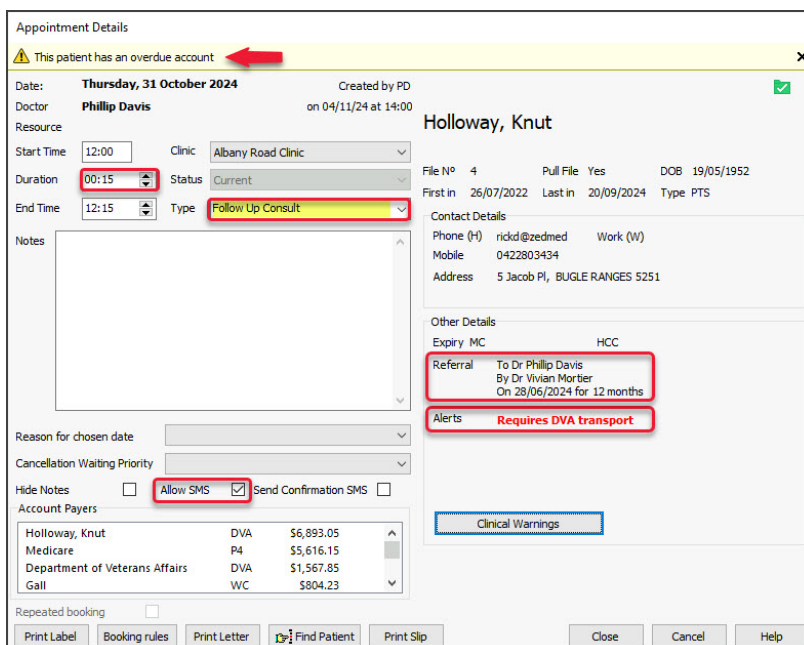
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What to check in the appointment and patient record when making a booking or attending a patient.

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.



Appointment Details

⚠ This patient has an overdue account

Date: **Thursday, 31 October 2024** Created by PD
 Doctor: **Phillip Davis** on 04/11/24 at 14:00
 Resource: **Holloway, Knut**

Start Time: 12:00 Clinic: Albany Road Clinic
 Duration: **00:15** Status: Current
 End Time: 12:15 Type: **Follow Up Consult**

File No 4 Pull File Yes DOB 19/05/1952
 First in 26/07/2022 Last in 20/09/2024 Type PTS

Contact Details
 Phone (H) rickd@zedmed Work (W)
 Mobile 0422803434
 Address 5 Jacob Pl, BUGLE RANGES 5251

Other Details
 Expiry MC HCC
Referral To Dr: Phillip Davis
 By Dr Vivian Mortier
 On 28/06/2024 for 12 months
Alerts **Requires DVA transport**

Reason for chosen date
 Cancellation Waiting Priority
 Hide Notes **Allow SMS** Send Confirmation SMS

Account Payers

Holloway, Knut	DVA	\$6,893.05
Medicare	P4	\$5,616.15
Department of Veterans Affairs	DVA	\$1,567.85
Gall	WC	\$804.23

Repeated booking

Print Label Booking rules Print Letter Find Patient Print Slip Close Cancel Help

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 their Medicare / Health Fund status.
- Select the **eHealth** status tab and retrieve the IHI if required.
- Check the patient has a **Payer** and **usual Dr fee schedule** selected.
- Check the **Alerts** for relevant information.
- Check there is a **Referral** and that the referral details are included.

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#: 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