

Set Up Appointment Statuses

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This article is part of the systems administration guide. You will require administration access to view the pages mentioned in this article.

-Linked with the user manual, please don't delete -

Appointment Statuses are used to indicate the current state of an appointment. CareRight is pre-loaded with a list of Appointment Statuses. Any additional statuses not in the system as standard will need to be added. An example list of configured appointment statuses might be:

Code	Appointment Status	Appointment Condition	Pre-loaded in CareRight?
B	Booked	Unconfirmed	Yes
S	Confirmed - SMS	Confirmed	No
P	Confirmed - Phone	Confirmed	No
O	Confirmed - Other	Confirmed	No
A	Arrived	Confirmed	No
X	Cancelled - SMS	Cancelled	No
Y	Cancelled - By Patient	Cancelled	No
Z	Cancelled - By Clinic	Cancelled	No
U	Completed - Unbilled	Confirmed	No
\$	Completed - Billed	Completed	No
C	Completed - No Billing Required	Completed	No

Conditions

Appointment Statuses also have a condition associated with them which is used by the SMS and Email system. Each appointment status, needs to be associated with one of the following conditions:

- Completed
- Cancelled
- Confirmed
- Unconfirmed

Creating Additional Appointment Statuses

1. Go to **Administration**.
2. Select **Appointments** from menu.
3. Select **Appointment Status** sub-menu.
4. Click **New**.
5. Fill in the fields using the table below as a reference.
6. Click **Create Appointment Status**.

Field	Description	Examples
Code	1 digit code for Appointment Status. This is displayed against the appointment in the calendar.	B (for booked) X (for Cancelled) W (for Waiting)
Description	Short description of the appointment status. This appears in the dropdown of appointment statuses when creating or editing the appointment.	Booked Cancelled Waiting
Condition	See description above	see description above.
Disabled	<p>By default, this is unchecked.</p> <p>If checked, then the status will be unavailable to new appointments. If an appointment uses a status that is currently in operation, then it is not affected and updates should be allowed to the appointment. The disabled status does not affect triggers scripts from using the appointment type.</p> <p>An appointment status cannot be disabled if it is used as one of the global calendar options default appointment statuses.</p>	

Updating Appointment Status Conditions

All appointment statuses should have a condition associated with them. You can change the condition by following these steps:

1. Go to **Administration**.

2. Select **Appointment** from menu.
3. Select **Appointment Status**.
4. For each Appointment Status existing appointment status, click **Edit**.
5. Select the **Condition** from the list.
6. Click **Update Appointment Status**.

Editing Appointment Status

You may need to edit an appointment status to disable it or alter its description

Go to **Administration**.

1. Select **Appointment** from menu.
2. Select **Appointment Status**.
3. Click **Edit** for the relevant Appointment Status.
4. Make the required changes
5. Click **Update Appointment Status**.

Removing Appointment Status

If an appointment status has never been used (and it not going to be needed) it is possible to remove it

Go to **Administration**.

1. Select **Appointment** from menu.
 2. Select **Appointment Status**.
 3. If a given Appointment Status has never been used, then a **Remove** button will appear next to the **Edit** button
 4. Click **Remove** for the relevant Appointment Status.
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