

Move or Rebook an appointment

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Move or Rebook an appointment

There are two ways to move an appointment:

1. Drag and Drop; and,
2. Right Click > Rebook

Rebooking allows the appointment to be moved from one time slot to another without leaving a copy of the appointment in the previous time slot.

Note:

For non-theatre booking, all details are copied from the source to the target appointment, except

- Start Date and Time
- Appointment Status

1. Moving an Appointment: Drag and Drop

Use this option to move an appointment to another session/time slot in the current calendar view/day/week.

E.g. You are in the working week view and you want to move the appointment to tomorrow.

1. Hover over the centre of the appointment.
2. Click and drag (by holding the left mouse key down) to another free appointment slot.
3. A screen should pop up, click **Rebook** to move the appointment.

2. Rebook an appointment

Use this option to move an appointment to a session/time slot that is not on the current calendar view or is weeks ahead (e.g., you are in the working week view and you want to move the appointment to date 2 weeks in the future).

This is the process of moving an appointment to another time slot.

1. Right-click on the appointment that you want to move to.
2. Click **Rebook**.
 1. Note: This copies the appointment to the Appointments Clipboard.
3. A warning message will appear at the top of the calendar

Appointment was successfully tagged as pending rebook. Select a time slot and paste to rebook.

- At the top left corner of the screen, click the **find** icon and select the date you wish to move the appointment to, or use the arrows to skip to the next day or week (depending on the current view you are in).
- Click into the session time that you want the appointment to move to, a dialogue box will appear.

The screenshot shows a software interface with a date/time grid on the right and a modal dialog box on the left. The dialog box is titled "Thu, 08/04/2021 12:30 pm - 01:00 pm" and contains the following fields:

- Provider: Tim Test
- Location: Clintel Clinic
- Session Name: Tim Thursday
- Session Type: Consultation
- Category: [empty]
- Session Notes: [empty text area]

Below the fields, there is a question: "Do you want to create a new appointment here, or move the existing appointment for 'FLOWERS, betty' ?". At the bottom of the dialog box are three buttons: "Create", "Move", and "Cancel Move". The background grid shows a calendar view with a highlighted slot for Thursday, 08/04/2021, from 12:30 pm to 01:00 pm.

- Click **Move** to move this appointment to this slot (clicking **Create** will create a new appointment and prompt you to find a patient).
- Click the **X** (top right-hand corner) to cancel the move.
- The appointment will now be moved to this time slot/date.