

Appointment Type Configuration

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Appointment Type Configuration

Notice

After you have created the **Message Type, Template and Appointment Trigger**, it is time to link these to an Appointment Type.

An Appointment Type can have many combinations of Triggers and Message Types. This means you can have multiple SMS messages sent at different times for an Appointment Type. Messages, triggers and appointment types are not location specific so all locations use the same configuration.

Follow these steps to set up triggers for an appointment type:

1. Click **Administration**.
2. Click **Appointments**
3. Click **Appointment Types**.
4. Click **Message Types** for the Appointment Type.
5. Click **New**.
6. Complete fields using the table below as a reference.
7. Click **Create Appointment Trigger Config**

Field	Description
Appointment Trigger	The name of the Appointment Trigger that determines the conditions under which this notification is activated.
Message Type	The appointment SMS Message Type is using for the notification
Template Override	Template overrides allow you to customise the message sent to Patient for each appointment type even through the user is sending the one Message type
With Share Assessment	Tick the checkbox to add the assessment for the appointment type.
Associated Assessment Name	Add the assessment you wish to share for appointment type from drop down. <i>(Additional note: Assessment must be a shareable assessment)</i>
Checklist	An optional checklist to associate with the appointment, to track pre- or post-appointment activities.

An example Appointment Type, Trigger and Message configuration might be:

Appointment Type: Initial Consultation (60mins)

Trigger 1:

Trigger Name: Appointment Creation (after 30 minutes, when appointment is Unconfirmed only)

SMS Message Type: New Patient SMS

Template Override: [blank]

Trigger 2:

Trigger Name: 2 Day Notification (at 7pm, 2 days prior to appointment, when appointment is Unconfirmed only)

SMS Message Type: Appointment Reminder

Template Override: [blank]

Upon booking an *Initial Consultation (60mins)* appointment:

- Trigger 1 would activate 30 minutes after the booking was made. It would check that the appointment is unconfirmed and send a "New patient SMS" SMS message.
 - Trigger 2 would activate daily at 7pm. It would look for *all unconfirmed* appointments on the date 2 days from today and send the "Appointment Reminder" SMS message for each.
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