Practice User Manual

We have designed this User Guide to help you understand how to use the Pippo Practice Portal. We recommend you read this guide in detail before using Pippo in your practice. We also recommend creating a new test patient in your practice and then register the patient on Pippo to ensure you are familiar with how it works from the patient perspective. If you have any queries regarding Pippo, please contact your PMS customer support.

Regards

Pippo Team

Lanasas

Last edited: 28082026

Configuration

Terms & Conditions

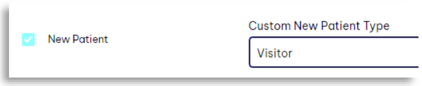
The first time you open the Pippo Portal you need to read the Terms & Conditions and click ‘Accept & Continue’ to proceed.

Settings

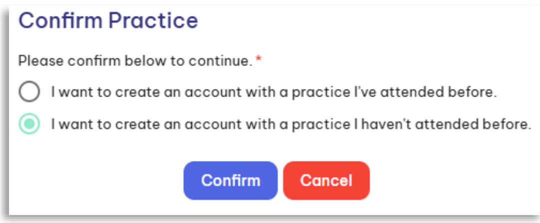
Click **Settings** tab to configure Pippo for your practice. Click **‘Save’** after configuring your changes.

1. Patient Type

New Patient – This feature allows patients register even if they are not a patient in your PMS. Click New Patient and add *Custom New Patient Type* to flag these patients in the PMS.



Once enabled patients can sign up and book any appointment type flagged as ‘New Patient’ (NP).



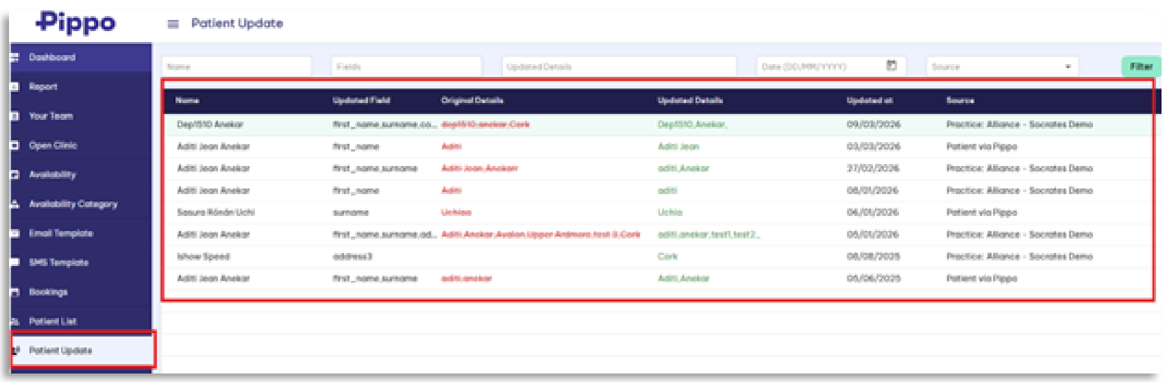
Note: You can change the patient to a Core Patient by changing their patient type in the PMS to e.g. Private, GMS etc.

2. Sync Options

Allow Patient Demographic Updates: When this feature is enabled:

- Patients can update their demographics on Pippo, and these changes will sync to your PMS.
- Changes made to patient’s demographics in the PMS will be updated on Pippo.

All changes are displayed in the ‘Patient Update’ tab on your Portal.



Allow Payments and Appointment Sync: This feature will sync each patient's last 2 years of payments & appointments, and future appointments from the PMS to Pippo. [Note: Appointments made from the PMS cannot be modified from Pippo.]

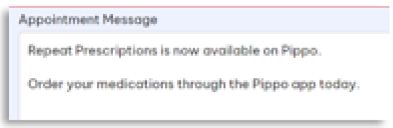
3. Appointment

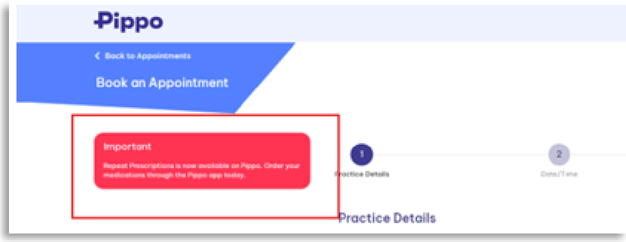
Enable or disable appointment bookings using the toggle button.

Cancellation & Reschedule Policy: Enable or disable the patient's ability to cancel and reschedule their appointment from the portal using the toggle button.

If enabled, you must specify the number of hours (1 to 720 hours) from the patient's appointment date/time where the appointment cannot be cancelled / rescheduled from the portal. Default is 24 hrs.

Appointment Message: Enter the message to be displayed when the patient books an appointment.

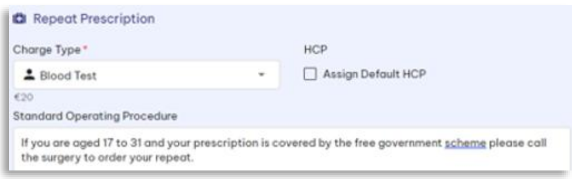




4. Repeat Prescriptions (Additional Module)

Please contact Support to enable Repeat Prescriptions. When enabled Patients can request a refill of their repeat medications and they can see printed prescriptions for the last 12 months. A pre-authorised payment will be taken via Billink at time of the request. Once completed within 7 days from your PMS, the payment will be taken and added to the patient's Account in your PMS. If declined the pre-auth is cancelled.

- Select the **Charge Type** to use for the Private Patients refill requests.
- Check 'Assign Default HCP' if you want the refill requests assigned to the patient's default HCP in the PMS, otherwise they will be unassigned in the Refill Requests section.

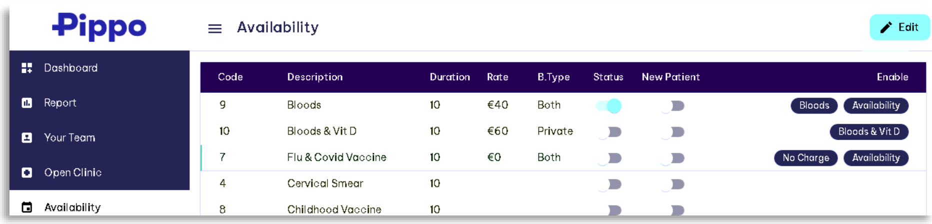


- **Refill policy:** Enter the number of days before a Prescription is due that a patient can request their refill.

Availability

Patients can book an appointment up to 6 weeks in the future. (from tomorrow). A pre-authorised payment will be taken via Billink at time of booking. Once the booking is confirmed the payment will be taken and added to the PMS. If declined the pre-auth is cancelled. Appointment types, durations, and charges from your PMS sync to Pippo on installation and every night.

Click **Availability** to configure the appointment types you want available on Pippo.

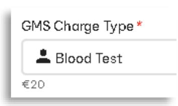


A) **Appointment Type:** Double-click on the appointment type to configure each field.

1. **Private Charge Type**: Charge the private patient will be asked to pay for the Appointment Type.
2. **Booking Type**: This dictates which patients can book the appointment type and who is charged.

Booking Type	Who can book this appointment?	Who will be asked for a payment?
Both	Private & GMS/DVC Patients	Private Patient Only
Both (GMS Charge)	Private & GMS/DVC Patients	Private & GMS/DVC Patient
GMS	GMS/DVC Patients	N/A
Private	Private Patients	Private Patient

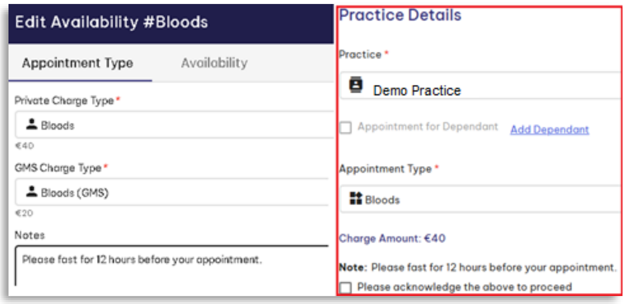
If you select **Both (GMS Charge)** you must select the GMS Charge Type from the dropdown list.



When a GMS patient is booking an appointment their GMS/DVC number will be validated. Patient will be advised to update their card details if it has expired or to book a private patient appointment.

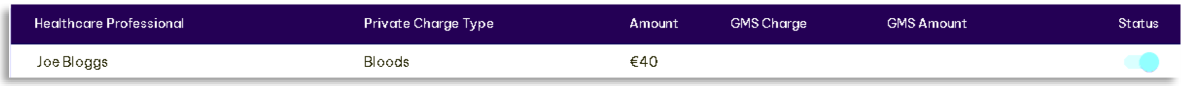
3. **'Opt out for Dependents'**: Appointment type will not be available for dependents.
4. **Status:** Toggle the status from  to to enable this appointment type on Pippo.
5. **Reason field:** If disabled there will be no 'Reason' field for patient to enter free text.

6. **New Patient (Setting):** Appointment type will be available for ‘New Patients’.
7. **Note:** If you add a note the patient must check a box to confirm they have read this note to proceed with the booking.

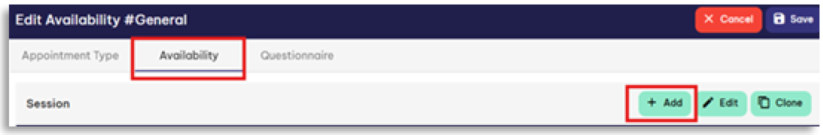


B) **HCP’s Availability:** Click the **Advance** dropdown arrow to show all HCP’s.

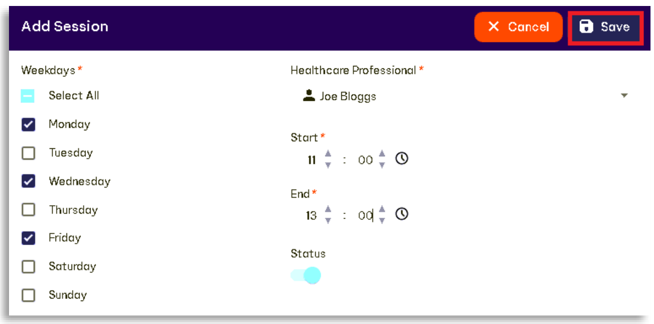
1. Healthcare Professionals: Toggle the status from to to enable the HCP**.**



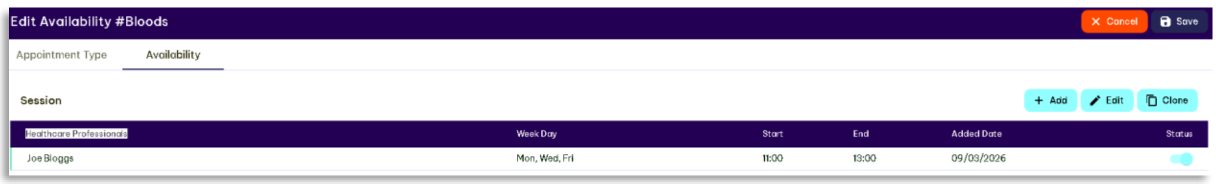
2. To restrict the availability of the HCP to certain days / times click **Availability** and click ‘Add’.



3. Select the HCP from the dropdown list, choose days of the week and the time range. Click **Save**.



The HCP’s availability is saved for this appointment type. Repeat for each HCP.



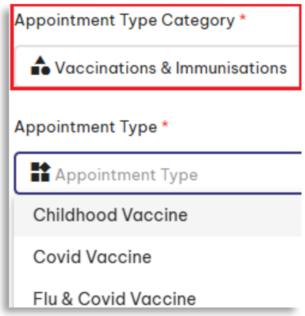
Click **‘Edit’** to modify the availability. Click **‘Clone’** to duplicate it for another HCP.

C) Click **Save**. Click Cancel to return to Availability. Repeat for each appointment type.

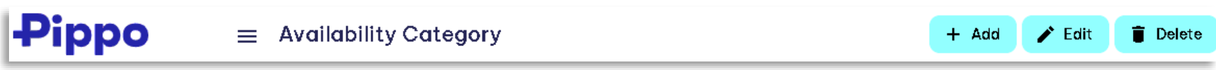
Click Bookings tab to view the availability that you have created to confirm it is correct.

Availability Category (Optional)

You can create categories to group appointment types under to make it easier for patients to find appointment types e.g. Vaccinations.



1. Click  and click **'Add'** to create a category.

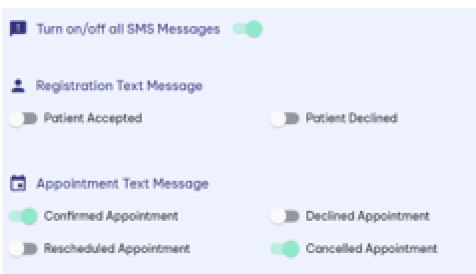


2. Enter the Category Name, select the required active appointment types, and click **Save**.

The Appointment Category is created. To modify a category select it, then click **Edit** or **Delete**.

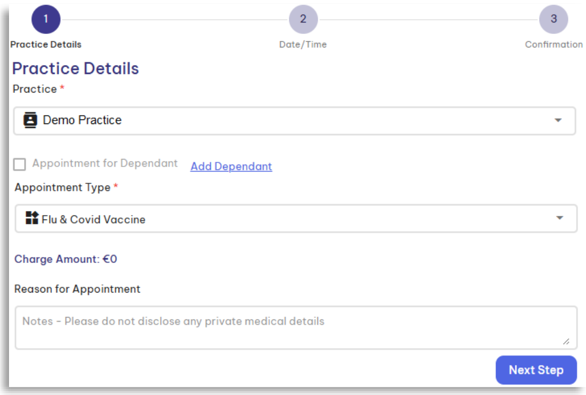
SMS Config

Click SMS Config to turn on / off all SMS messages or individual sms messages as required.



Open Clinic (Optional)

This feature allows the patient to book an appointment without selecting a HCP. You set up the clinic once and modify the availability to reuse it for different dates and HCP's e.g. Flu Campaign.

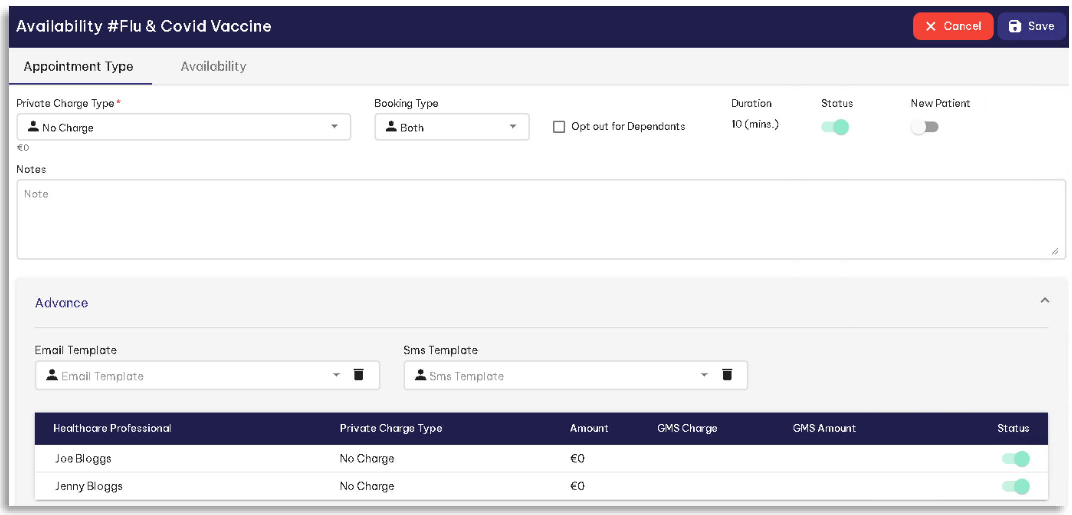


The Open Clinic shows the <u>combined availability</u> based on the Availability set for the Appointment Type for each HCP added to the Open Clinic.

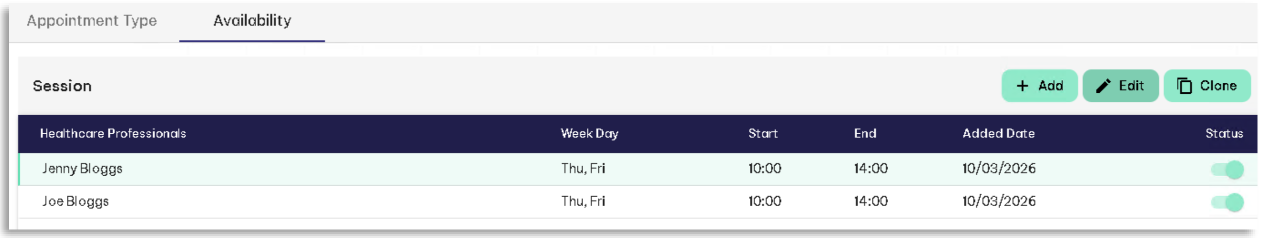
- HCP must be available in the PMS on those days / times (Online Diary Availability - Socrates)
- Appointment Type must have availability for those HCP's and those days / times.
- Patients book the Open Clinic appointment type and are automatically assigned to an available HCP at the time of booking based on the HCPs available in the Open Clinic at that time.
- Practice cannot move open clinic Pippo appointments on the diary to an HCP not in the Open Clinic to free up time slots.

<u>Step 1: Create Appointment Type for the Open Clinic</u>

Create a separate Appointment type for the Open Clinic in your PMS. There is a nightly sync from the PMS to update appointment types and charged on Pippo. Contact Support if you need a manual sync performed.

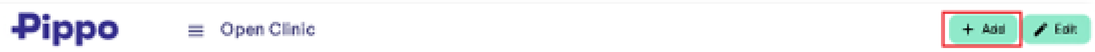


Set Availability for the same days / times as the Open Clinic.



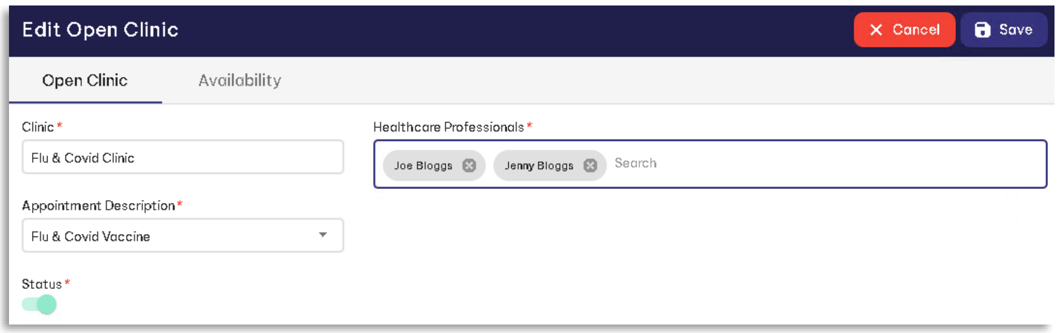
Step 2: Create Open Clinic

1. Click Open Clinic and click **'Add'**.

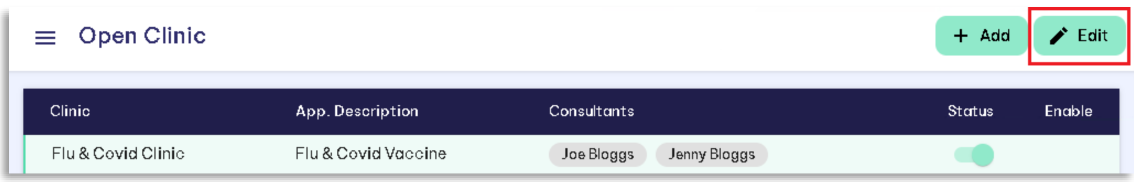


Enter all details and click **Save**.

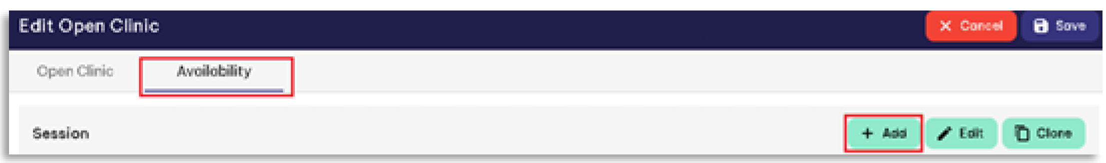
a. **Clinic** & **Appointment Description:** Choose the appointment type, e.g. Flu & Covid vaccine.
b. **Healthcare Professionals:** Select each HCP available for the clinic.



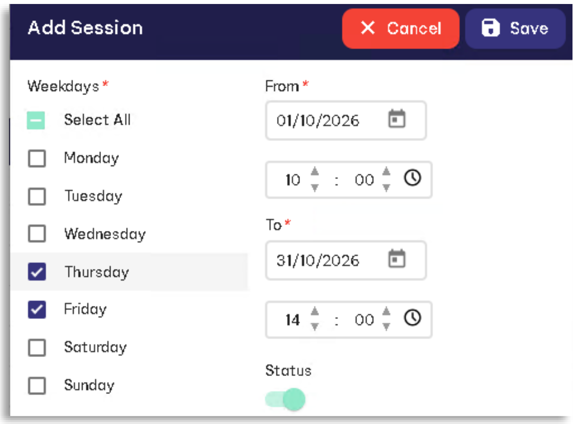
2. Select the Open Clinic and click **'Edit'**.



3. Click Availability tab and click **'Add'**.



4. Select the days of the week, dates and time range for this clinic and click **Save**. E.g. Flu & Covid vaccine clinic every Thursday and Friday in October from 10am until 2pm.



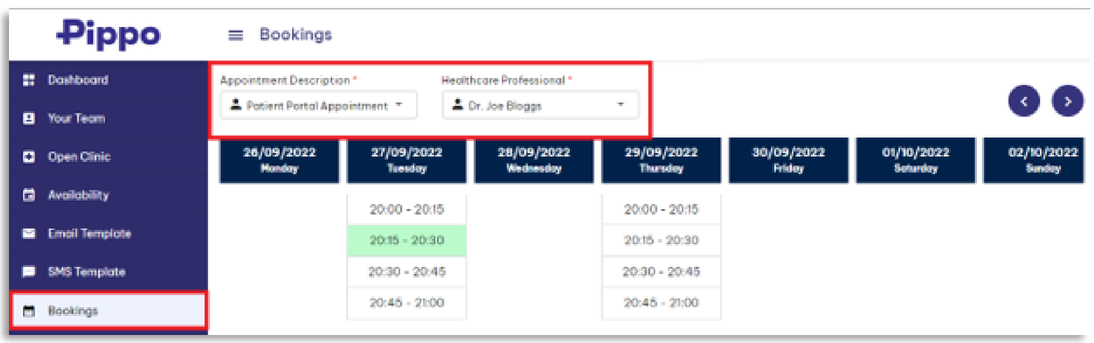
The Open Clinic availability is displayed. Click **Save**. When the patient selects this appointment type on Pippo the available slots will be displayed.

- **Edit**: Modify the dates / times / days of the week.
- **Clone**: Duplicates the availability so you can create another clinic.
- **Deactivate**: Toggle the status to disable the Open Clinic Availability

Lists

Bookings

This section shows Time slots allocated by type – Available, Unavailable and Booked. Use the arrows at the top of the screen to change the week you are viewing.



TIME SLOT COLOUR	DESCRIPTION
White	Available for patient to book
Grey	Not available for patient to book
Green	Booked by a patient

Patient List

Manage your registered and unregistered Pippo patients from this section.

Patient Type	Description	Registration Options
CP	Core Patient (>16)	PMS* or Pippo website/app
CD	Core Dependent (<16)	Must be registered from Parent / Guardian's Pippo account
NP	New Patient	Pippo website/app

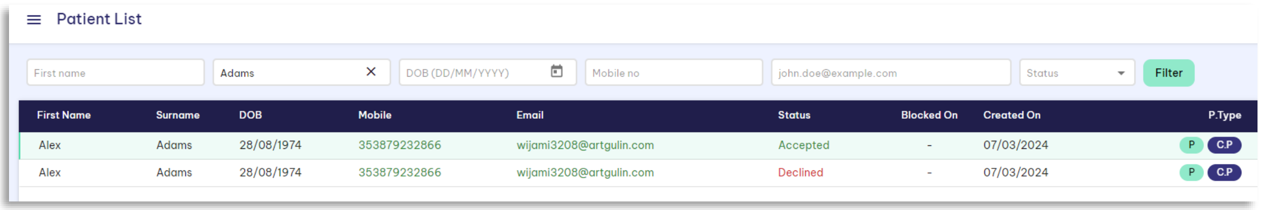
*Dependents account expires on reaching age 16. Patient must register new account on Pippo website/app.

- **Search:** To search for a particular record, enter any of the patient's demographics and click Filter.
- Double-click a record to view the details entered by the patient's registration details.
- To go back to the main portal, click **Cancel**.

<u>INVITE PENDING:</u> Patient has been invited from PMS but has not clicked the link in the email. Patient must confirm their mobile number, accept the Terms & Conditions to complete the registration.

<u>PENDING:</u> Patient registered on Pippo but has not clicked the link in the email.

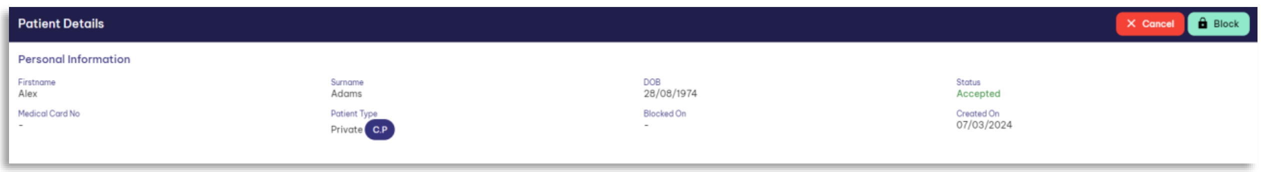
<u>DECLINED:</u> Patient's demographics are different in the PMS. [First name, Surname, DOB, Address line 1, Mobile number]. Double-click to view the details and compare them with the details in the PMS. You may need to contact the patient to correct the PMS. Dependents must have the same mobile number in the PMS as the parent / guardian's pippo account.



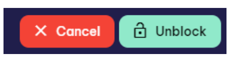
Otherwise, you can invite the patient (Over 16's) directly from your PMS. The patient will be sent an email with a link to register.

If the patient has been sent a new link or has registered correctly you can remove the declined patient record by double-clicking on the record and clicking 'Remove from List'.

<u>CONFIRMED</u>: Double click to view the patients Pippo registration. Click **Block** to block the patient from logging into their Pippo account.

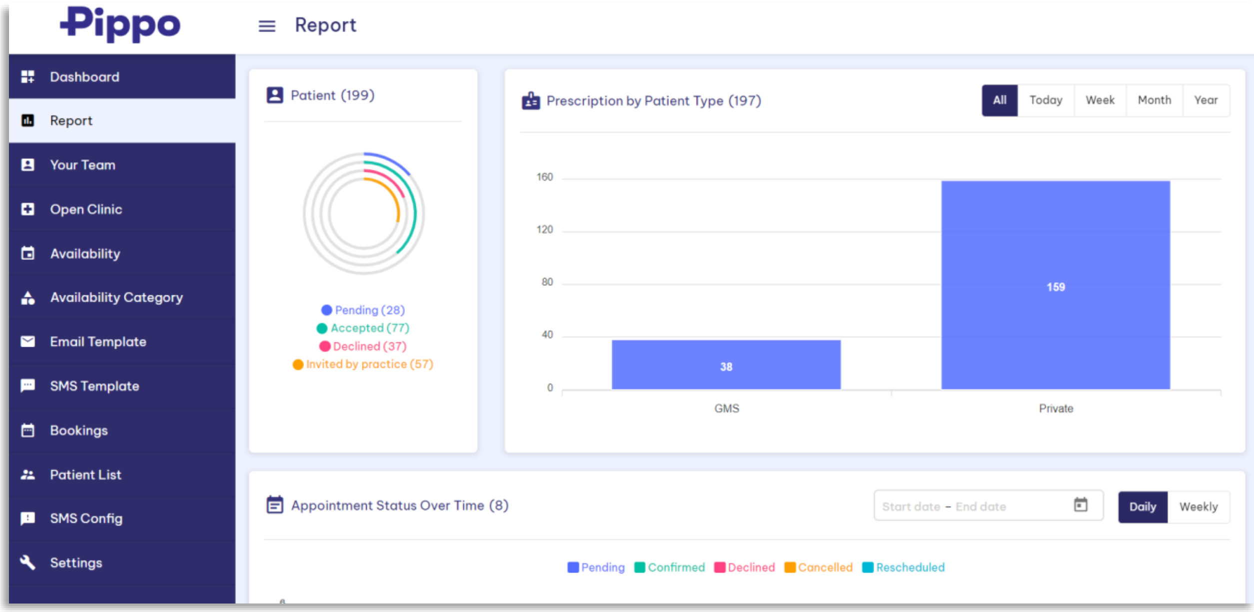


To unblock the patient, double-click on their record and click unblock.



Report

Click Report to see an overview of Pippo in your practice.

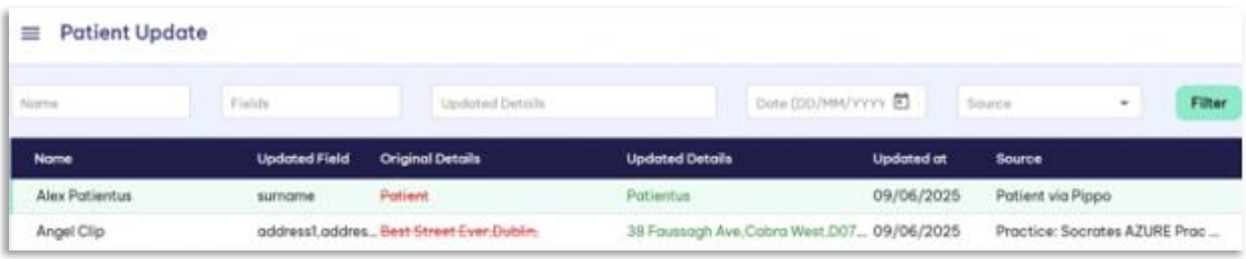


Your Team

This section allows you to view the GPs, nurses and healthcare professionals who work in the practice. These details are added from the practice management system and cannot be modified from the portal. To add or modify healthcare professionals, please update the practice management systems.

Patient Update (Setting)

If 'Allow Patient Demographic Updates' is enabled in Settings, you will see all demographics updates in the Patient Update tab.  You can view the changes made and the source of this update.



Additional Configurations

Custom Templates (Optional)

A default template is used for all email and SMS messages however you can customise them if you wish.

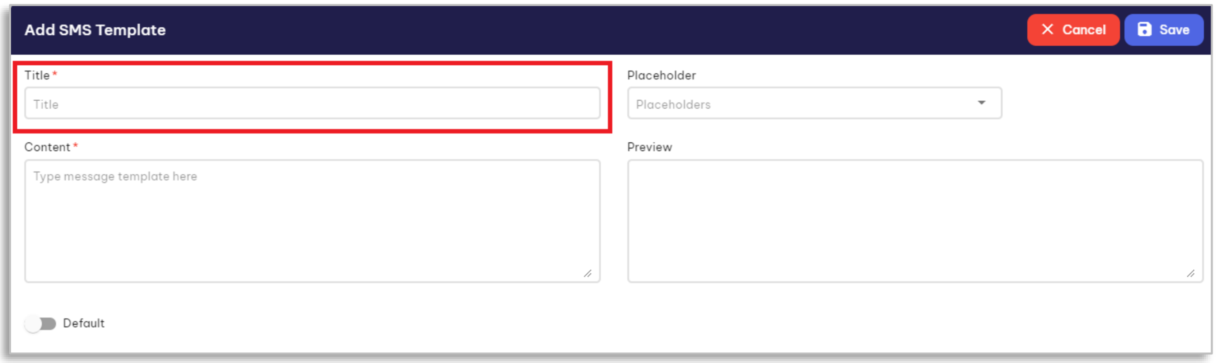
- **SMS Template**

To create a template for SMS, click 

from the side menu, and click 'Add'.

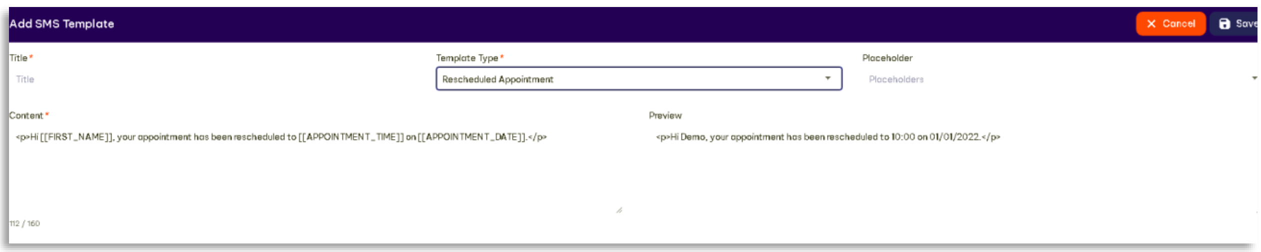
Fill in the below details:

Title: Type the name of the SMS Template (E.g., New Appointment, Review Appointment etc.).

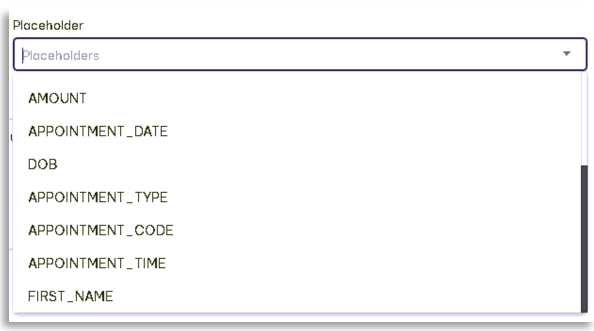


Template Type: Select the template type from the dropdown list e.g., Confirmed Appointment.

Content: The default template is auto populated once you select a Template Type.



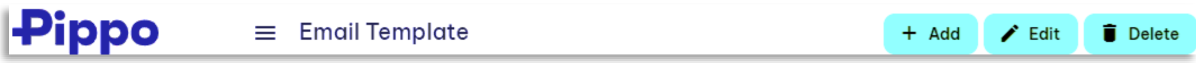
Edit the content as required. Choose the required placeholders from the list one at a time. Use the scroll wheel on your mouse to view all the placeholders.



Click **Save**. Your custom SMS template is configured. To modify a custom template select it, then click Edit or Delete.

- **Email Template**

To create a custom email template, click ‘Email Template’ from the side menu, and then click ‘Add’.

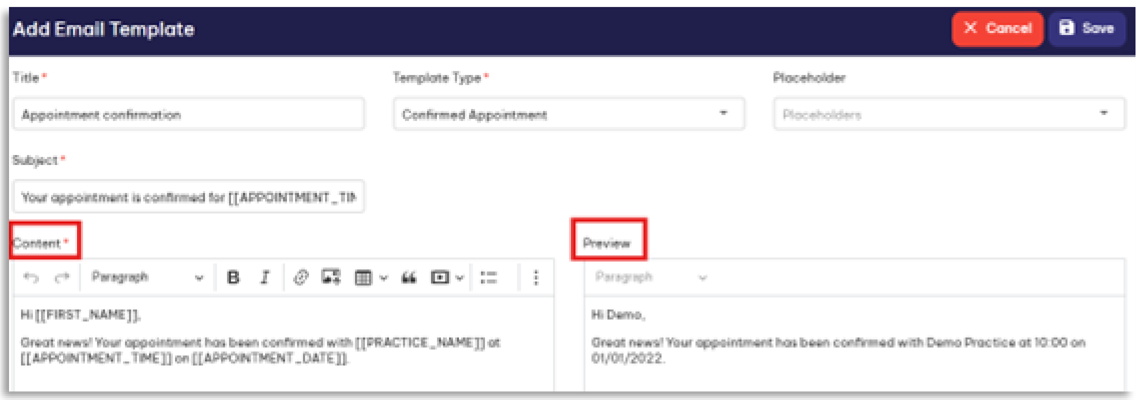


<u>Fill in the below details:</u>

Title: Type the name of the email template (E.g., New Appointment).

Template Type – Choose the template type by clicking on the dropdown (E.g., Appointment)

Content: The default template is auto populated once you select a Template Type. Edit the content as required. Choose the required placeholders from the list one at a time. Use the scroll wheel on your mouse to view all the placeholders.



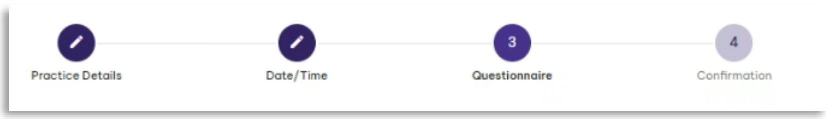
Subject – Type a subject or a heading that is relevant to this email template. Use placeholders by selecting them one at a time.

Click **Save**. Your custom Email template is configured.

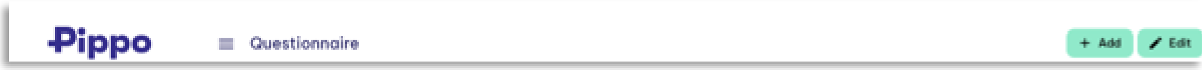
To modify a custom template select it, then click Edit or Delete.

Questionnaire (Additional Module)

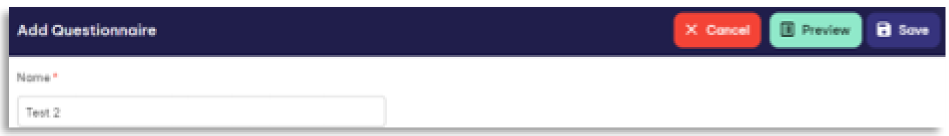
Please contact Support if you want the Questionnaire module enabled. Click **Questionnaire** to add a prebooking questionnaire to an appointment type. The questionnaire is displayed for the patient to complete as part of the booking process and will be displayed in the patient's documents in the PMS.



1. Click 'Add'.



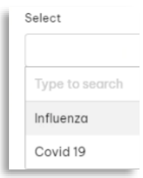
2. Enter a useful 'Name' for the questionnaire.



3. Drag fields onto the form. [Max 20]

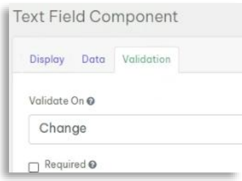
   a. Text field: One line text field.
   b. Text Area: Multi-line text field.
   c. Email: Only an email address with an @ symbol can be added.
   d. Number: Only numeric values can be added.
   e. Phone Number: Only Numeric values up to 10 digits can be added.
   f. Checkbox: e.g. 

   g. Select: Patient can select one answer from a list.

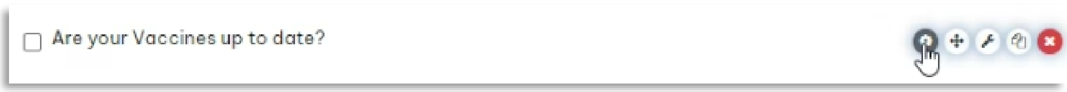


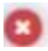
h. Radio: e.g. Yes or No answer.

To mark questions as Mandatory on the form select **Validation** and check Required.

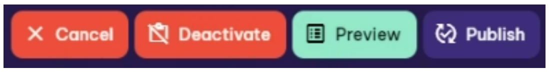


To modify a field after adding it, hover over the field and the menu will be displayed.

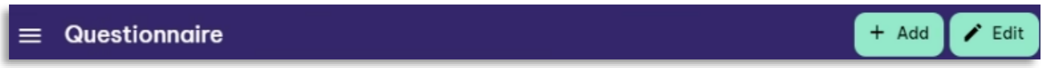


- Edit 
- Copy 
- Delete 

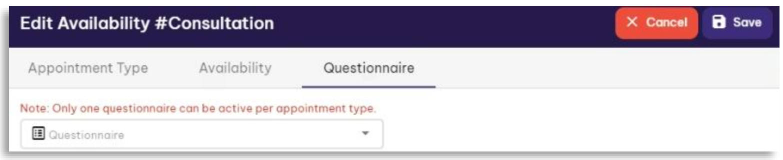
Buttons:



- Click **Preview** to view the questionnaire is correct.
- Click **Publish** to save the questionnaire.
- To remove a questionnaire click **Deactivate** then click **Cancel**.
- To edit a questionnaire, select it from the list and click **Edit**.



To assign a questionnaire to an appointment type click **Availability** and edit the appointment type. Click the **Questionnaire** tab and select the questionnaire from the list and click **Save**.



If the questionnaire is deactivated it will be automatically removed from any appointment type it has been added to.