

Practice User Manual

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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

Configuration

Terms & Conditions

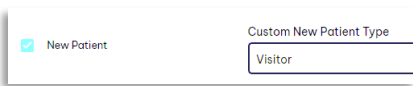
The first time you open the Pippo Portal you need to read the Terms & Conditions and click 'Accept & Continue' to proceed.

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).

Confirm Practice

Please confirm below to continue. *

- ☐ I want to create an account with a practice I've attended before.
- ☒ I want to create an account with a practice I haven't attended before.

Confirm

Cancel

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

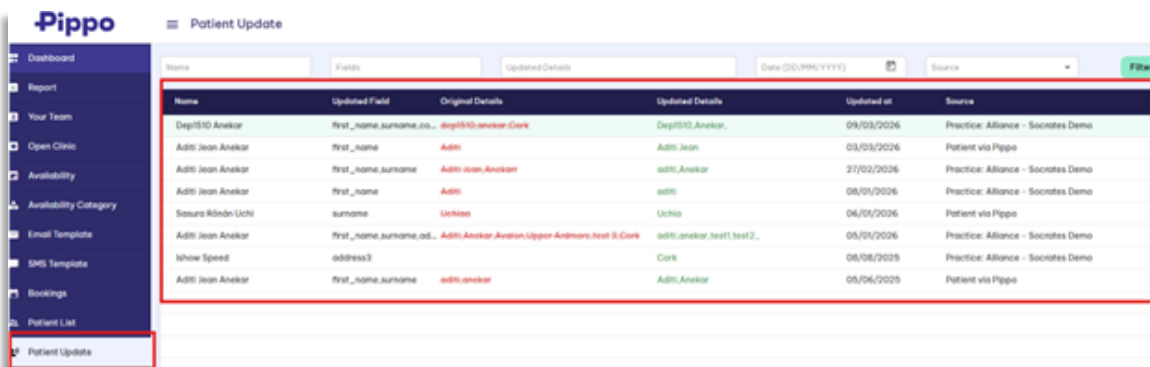
2. Sync Options

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.



Name	Updated Field	Original Details	Updated Details	Updated at	Source
DagDISD Anekar	first_name.surname.ad...	dagDISD Anekar-Cork	DagDISD Anekar	09/09/2026	Practice: Alliance - Socrates Demo
Aditi Jean Anekar	first_name	Aditi	Aditi Jean	03/03/2026	Patient via Pippo
Aditi Jean Anekar	first_name.surname	Aditi Jean Anekar	aditi Anekar	27/02/2026	Practice: Alliance - Socrates Demo
Aditi Jean Anekar	first_name	Aditi	aditi	06/01/2026	Practice: Alliance - Socrates Demo
Sasara Rōndō Uchi	surname	Uchiwa	Uchiwa	04/01/2026	Patient via Pippo
Aditi Jean Anekar	first_name.surname.ad...	Aditi Anekar Avelon Upper Andrews test 9 Cork	aditi anekar test1 test2...	05/01/2026	Practice: Alliance - Socrates Demo
Ishw Speed	address3		Cork	06/08/2025	Practice: Alliance - Socrates Demo
Aditi Jean Anekar	first_name.surname	aditi anekar	Aditi Anekar	05/04/2025	Patient via Pippo

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



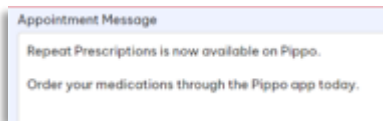
Enable or disable appointment bookings using the toggle button.

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.

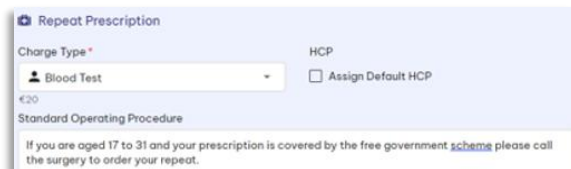
Appointment Message: Enter the message to be displayed when the patient books an appointment.



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.

Repeat Prescription

Charge Type
OnlineRefill
€20

Refill Policy Days before due
 ⌚ e.g. 14

Leave blank to allow requests at any time

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.

Pippo Availability Edit									
Code	Description	Duration	Rate	B.Type	Status	New Patient	Enable		
9	Bloods	10	€40	Both	☒	☐	☐ Bloods ☐ Availability		
10	Bloods & Vit D	10	€60	Private	☐	☐	☐ Bloods & Vit D		
7	Flu & Covid Vaccine	10	€0	Both	☐	☐	☐ No Charge ☐ Availability		
4	Cervical Smear	10			☐	☐			
8	Childhood Vaccine	10			☐	☐			

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

Edit Availability #Bloods X Cancel

Appointment Type Availability

Private Charge Type* Booking Type

⬆ Bloods
 ⬆ Both

⬆ Both
 ⬆ Opt out for Dependents

Duration
 10 (mins.)

Status
☒

Reason Field
☒

New Patient
☐

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.

GMS Charge Type*

⬆
⬆ Blood Test

 €20

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.

Healthcare Professional	Private Charge Type	Amount	GMS Charge	GMS Amount	Status
Joe Bloggs	Bloods	€40			

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.

Healthcare Professional	Week Day	Start	End	Added Date	Status
Joe Bloggs	Mon, Wed, Fri	11:00	13:00	09/03/2026	

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

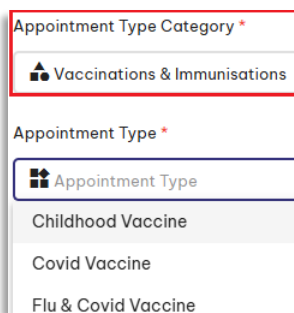
C) Click **Save**. Click Cancel to return to Availability. Repeat for each appointment type.



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

Availability Category (Optional)

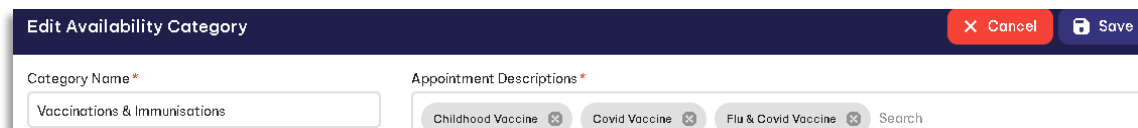
You can create categories to group appointment types under to make it easier for patients to find appointment types e.g. Vaccinations.



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



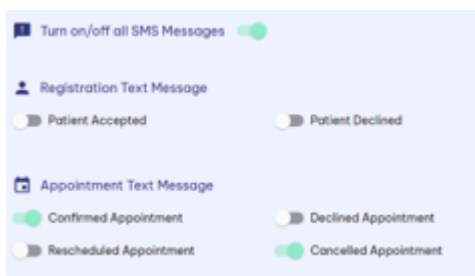
2. Enter the Category Name, select the required active appointment types, and click **Save**.



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 screenshot shows the 'Practice Details' step (Step 1) of a three-step process. The steps are labeled 1, 2, and 3 at the top. The 'Practice Details' section includes a dropdown menu for 'Practice' with 'Demo Practice' selected. Below this is a checkbox for 'Appointment for Dependant' with a link 'Add Dependant'. The 'Appointment Type' dropdown is set to 'Flu & Covid Vaccine'. The 'Charge Amount' is '€0'. There is a text area for 'Reason for Appointment' with a placeholder 'Notes - Please do not disclose any private medical details'. A 'Next Step' button is at the bottom right.

The Open Clinic shows the combined availability 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.

Step 1: Create Appointment Type for the Open Clinic

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.

The screenshot shows the 'Availability #Flu & Covid Vaccine' setup screen. It has a dark blue header with 'Cancel' and 'Save' buttons. The screen is divided into two tabs: 'Appointment Type' and 'Availability'. The 'Appointment Type' tab is active. It includes a 'Private Charge Type' dropdown set to 'No Charge', a 'Booking Type' dropdown set to 'Both', and a checkbox for 'Opt out for Dependants'. The 'Duration' is '10 (mins.)', 'Status' is a green toggle, and 'New Patient' is a grey toggle. There is a 'Notes' text area. Below this is an 'Advance' section with 'Email Template' and 'Sms Template' dropdowns. At the bottom is a table with columns: Healthcare Professional, Private Charge Type, Amount, GMS Charge, GMS Amount, and Status.

Healthcare Professional	Private Charge Type	Amount	GMS Charge	GMS Amount	Status
Joe Bloggs	No Charge	€0			
Jenny Bloggs	No Charge	€0			

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

Appointment Type

Availability

Session

+ Add

Edit

Clone

Healthcare Professionals	Week Day	Start	End	Added Date	Status
Jenny Bloggs	Thu, Fri	10:00	14:00	10/03/2026	
Joe Bloggs	Thu, Fri	10:00	14:00	10/03/2026	

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.

Edit Open Clinic

Cancel

Save

Open Clinic

Availability

Clinic *

Flu & Covid Clinic

Healthcare Professionals *

Joe Bloggs

Jenny Bloggs

Search

Appointment Description *

Flu & Covid Vaccine

Status *

☒

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

Open Clinic					+ Add Edit	
Clinic	App. Description	Consultants		Status	Enable	
Flu & Covid Clinic	Flu & Covid Vaccine	Joe Bloggs	Jenny Bloggs	☒		

3. Click Availability tab and click 'Add'.

Edit Open Clinic

Cancel

Save

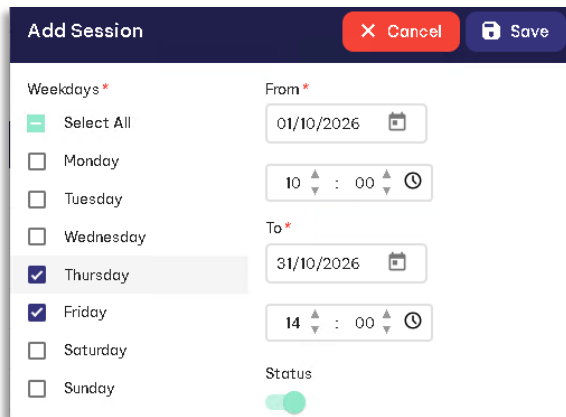
Open Clinic

Availability

Session

[+ Add](#)
[Edit](#)
[Clone](#)

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.



Add Session [Cancel] [Save]

Weekdays *

- ☐ Select All
- ☐ Monday
- ☐ Tuesday
- ☐ Wednesday
- ☒ Thursday
- ☒ Friday
- ☐ Saturday
- ☐ Sunday

From *

01/10/2026 [Calendar Icon]

10 : 00 [Clock Icon]

To *

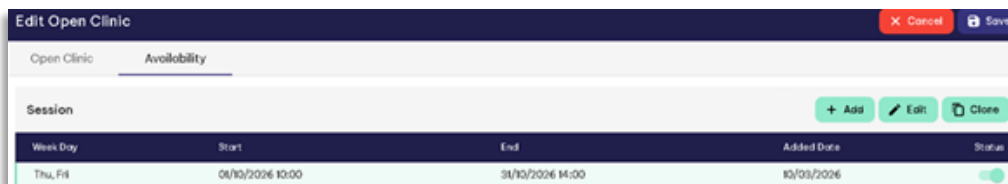
31/10/2026 [Calendar Icon]

14 : 00 [Clock Icon]

Status

☒

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



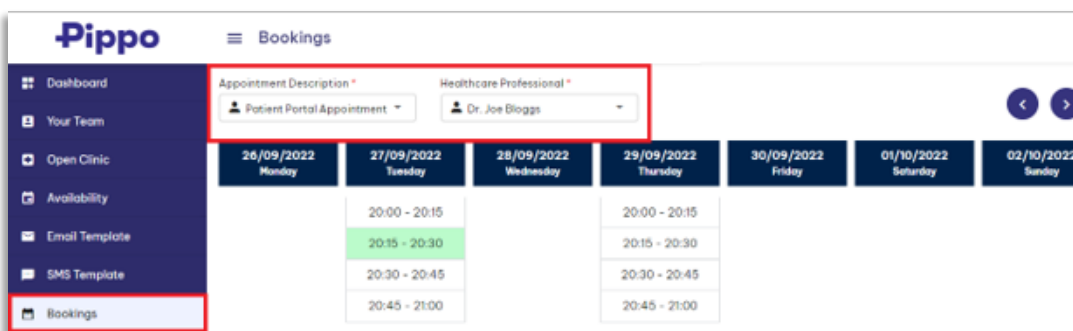
Edit Open Clinic				
Open Clinic Availability				
Session				
Week Day	Start	End	Added Date	Status
Thu, Fri	01/10/2026 10:00	31/10/2026 14:00	10/03/2026	☒

- **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. 



Pippo Bookings

Appointment Description * Healthcare Professional *

Patient Portal Appointment Dr. Joe Bloggs

26/09/2022 Monday	27/09/2022 Tuesday	28/09/2022 Wednesday	29/09/2022 Thursday	30/09/2022 Friday	01/10/2022 Saturday	02/10/2022 Sunday
	20:00 - 20:15		20:00 - 20:15			
	20:15 - 20:30		20:15 - 20:30			
	20:30 - 20:45		20:30 - 20:45			
	20:45 - 21:00		20:45 - 21:00			

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

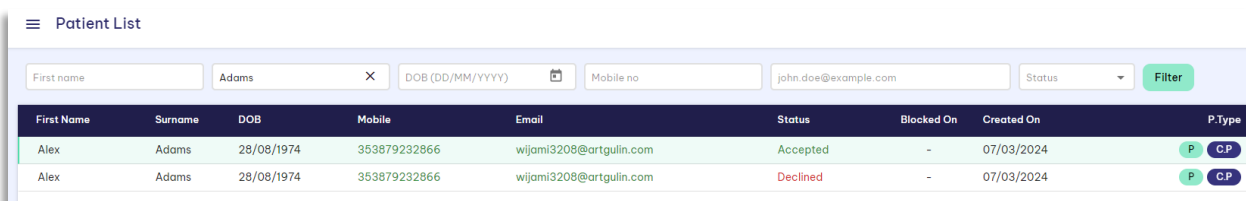
*Dependents account expires on reaching age 16. Patient must register new account on Pippo website/app.

- **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**.

INVITE PENDING: 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.

PENDING: Patient registered on Pippo but has not clicked the link in the email.

DECLINED: 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.



The screenshot shows the 'Patient List' interface. At the top, there is a search bar with fields for 'First name', 'Surname', 'DOB (DD/MM/YYYY)', 'Mobile no', 'Email', and 'Status'. A 'Filter' button is on the right. Below the search bar is a table with the following columns: First Name, Surname, DOB, Mobile, Email, Status, Blocked On, Created On, and P.Type. Two records are shown: one with status 'Accepted' and one with status 'Declined'.

First Name	Surname	DOB	Mobile	Email	Status	Blocked On	Created On	P.Type
Alex	Adams	28/08/1974	353879232866	wijami3208@artgulin.com	Accepted	-	07/03/2024	P C.P
Alex	Adams	28/08/1974	353879232866	wijami3208@artgulin.com	Declined	-	07/03/2024	P C.P

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'.



CONFIRMED: Double click to view the patients Pippo registration. Click **Block** to block the patient from

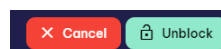
logging into their Pippo account. **Your PIPPO account has been blocked by your practice. Please contact them for assistance.**



The screenshot shows the 'Patient Details' interface. At the top, there is a header with 'Patient Details' and buttons for 'Cancel' and 'Block'. Below the header is a table with the following columns: First Name, Surname, DOB, Status, Medical Card No, Patient Type, Blocked On, and Created On. The patient's details are: Alex Adams, DOB 28/08/1974, Status Accepted, Medical Card No -, Patient Type Private C.P, Blocked On -, Created On 07/03/2024.

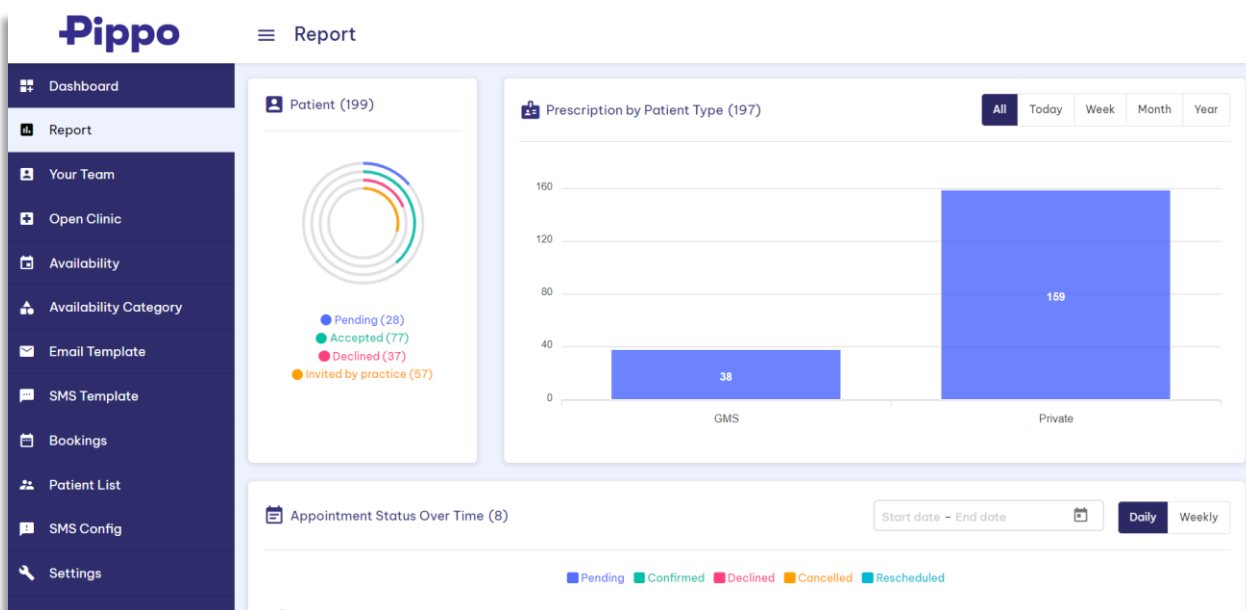
First Name	Surname	DOB	Status	Medical Card No	Patient Type	Blocked On	Created On
Alex	Adams	28/08/1974	Accepted	-	Private C.P	-	07/03/2024

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.

The screenshot shows the Pippo 'Your Team' page. It features a sidebar with navigation options: Dashboard, Report, Your Team, and Open Clinic. The main content area displays a table of healthcare professionals:

Date	Name	Email ID	Mobile No
13/03/2023	Mary Bloggs		
08/12/2022	Dr. Joe Bloggs		
08/12/2022	Dr. Andrew Smith		
08/12/2022	Jim Robinson		

Patient Update (Setting)

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

The screenshot shows the Pippo 'Patient Update' page. It includes a sidebar with the 'Patient Update' option selected. The main content area has a search bar with fields for Name, Fields, Updated Details, Date (DD/MM/YYYY), and Source, along with a Filter button. Below the search bar is a table of patient updates:

Name	Updated Field	Original Details	Updated Details	Updated at	Source
Alex Patientus	surname	Patient	Patientus	09/06/2025	Patient via Pippo
Angel Clip	address1, address2	Best Street Ever, Dublin	38 Faussagh Ave, Cobna West, D07...	09/06/2025	Practice: Socrates AZURE Prac...

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  **SMS Template** from the side menu, and click 'Add'.

Pippo

≡ SMS Template

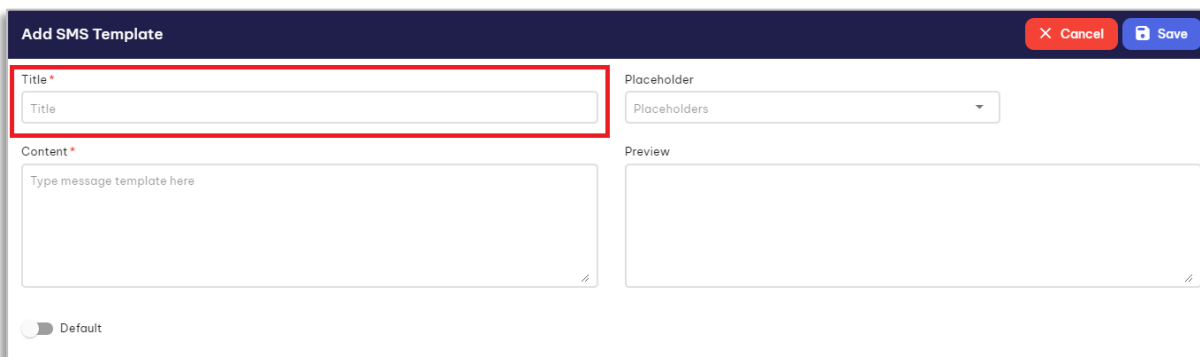
+ Add

✎ Edit

🗑 Delete

Fill in the below details:

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



Add SMS Template [Cancel] [Save]

Title *
Title

Placeholder
Placeholders

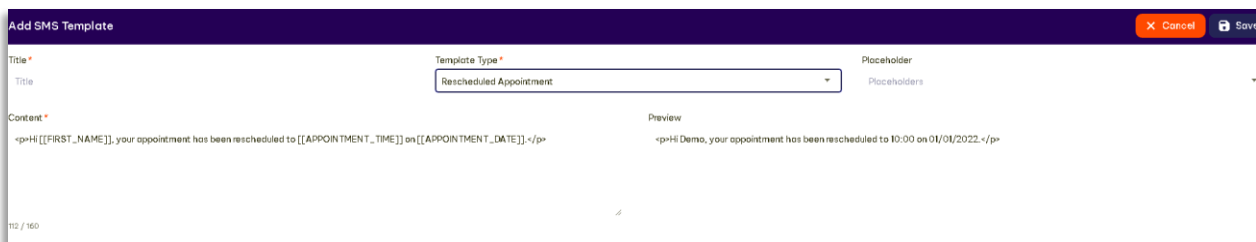
Content *
Type message template here

Preview

☐ Default

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.



Add SMS Template [Cancel] [Save]

Title *
Title

Template Type *
Rescheduled Appointment

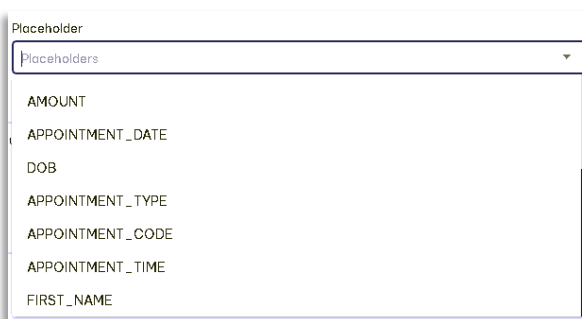
Placeholder
Placeholders

Content *
<p>Hi [[FIRST_NAME]], your appointment has been rescheduled to [[APPOINTMENT_TIME]] on [[APPOINTMENT_DATE]].</p>

Preview
<p>Hi Demo, your appointment has been rescheduled to 10:00 on 01/01/2022.</p>

112 / 160

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.



Placeholder
Placeholders

- AMOUNT
- APPOINTMENT_DATE
- DOB
- APPOINTMENT_TYPE
- APPOINTMENT_CODE
- APPOINTMENT_TIME
- FIRST_NAME

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



▪ Email Template

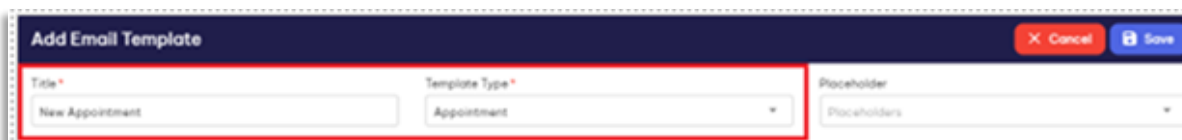
To create a custom email template, click 'Email Template' from the side menu, and then click 'Add'.



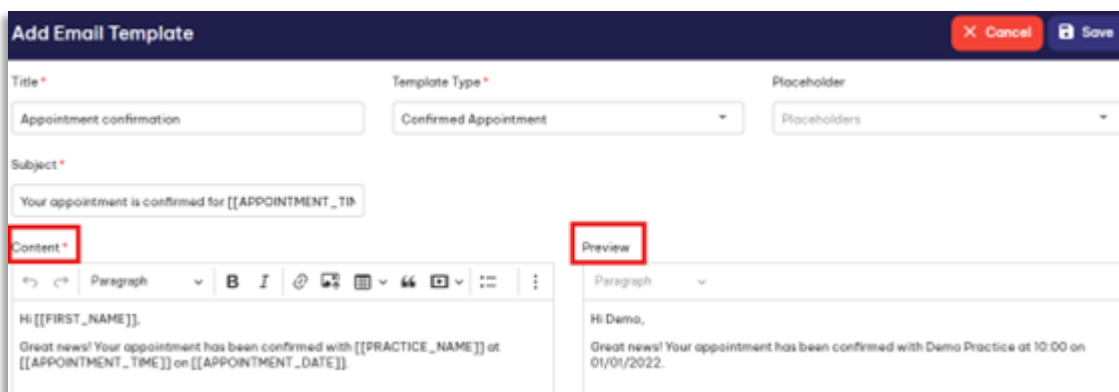
Fill in the below details:

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.

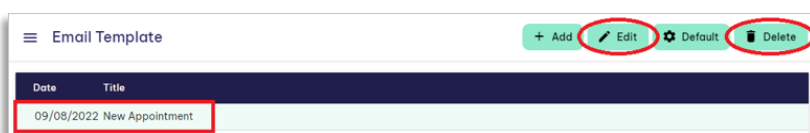


Subject – Type a subject or a heading that is relevant to this email template. Use placeholders by selecting them one at a time.



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

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



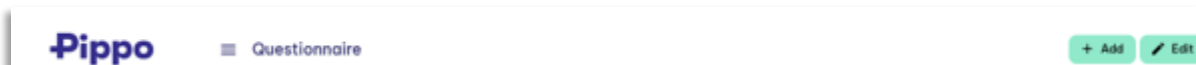
Questionnaire (Additional Module)

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.

Additional Info: A pre-booking questionnaire is attached for this appointment. Please open the Documents section to access the questionnaire PDF.
- Received via Online Booking -

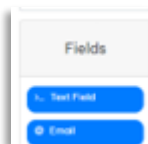


1. Click 'Add'.

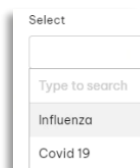


2. Enter a useful 'Name' for the questionnaire.

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

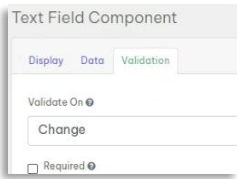


- a. Text field: One line text field.
- b. Text Area: Multi-line text field.
- c. Email: Only an email address with an @ symbol can be added.
- d. Number: Only numeric values can be added.
- e. Phone Number: Only Numeric values up to 10 digits can be added.
- f. Checkbox: e.g. ☐ Are your Vaccines up to date?
- g. Select: Patient can select one answer from a list.

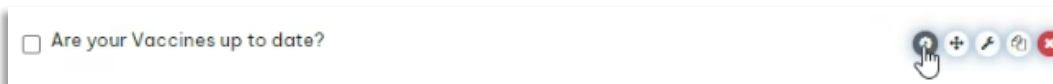


h. Radio: e.g. Yes or No answer.

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

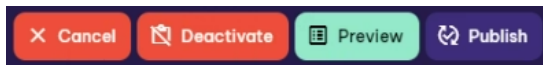
A screenshot of the 'Text Field Component' configuration window, specifically the 'Validation' tab. It shows a 'Validate On' dropdown menu with 'Change' selected, and a 'Required' checkbox which is currently unchecked.

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

A screenshot of a form field containing the text 'Are your Vaccines up to date?'. A hover menu is visible on the right side of the field, containing icons for Edit, Copy, and Delete.

- Edit 
- Copy 
- Delete 

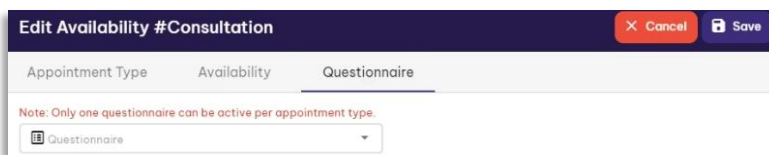
Buttons:

A row of four buttons: 'Cancel' (red with a close icon), 'Deactivate' (red with a deactivate icon), 'Preview' (teal with a list icon), and 'Publish' (purple with a publish icon).

- 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**.

A header bar for a questionnaire list. It features a hamburger menu icon, the text 'Questionnaire', and two buttons: '+ Add' and 'Edit' (with a pencil icon).

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**.

A screenshot of the 'Edit Availability #Consultation' form. It has tabs for 'Appointment Type', 'Availability', and 'Questionnaire'. The 'Questionnaire' tab is active. A note states: 'Note: Only one questionnaire can be active per appointment type.' Below the note is a dropdown menu labeled 'Questionnaire'.

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