

# 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 take the time to read this guide in detail before you start using Pippo in your practice. We also recommend setting up a new test patient in your practice with a test Pippo accounts 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**

**Lanas**

# Configuration

## Terms & Conditions

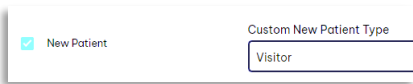
The first time you open the Pippo Portal you need to read the Terms & Conditions and click 'Accept & Continue' to proceed.

## Settings

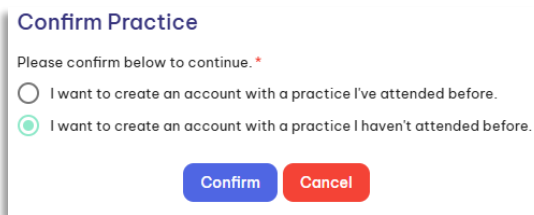
Click **Settings** tab to configure Pippo for your practice. Click **'Save'** after configuring your changes.

### 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. (From the custom New Patient type e.g., Visitor to e.g., Private, GMS etc.)

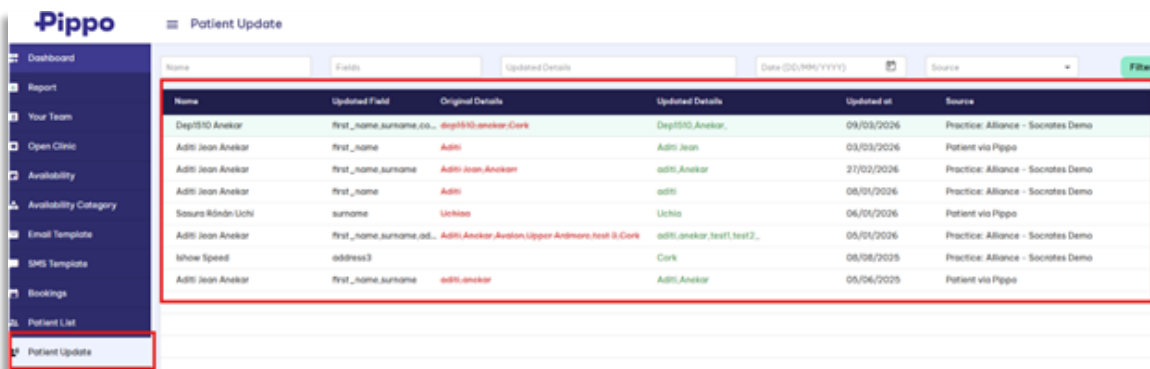
### 2. Sync Options

**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
Dagfisd Anekar	first_name.surname.gi...	dagfisd.anekar-Cork	Dagfisd.Anekar	09/03/2026	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	08/01/2026	Practice: Alliance - Socrates Demo
Sasara Rōndō Uchi	surname	Uchies	Uchies	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
John Speed	address3		Cork	08/08/2025	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.]

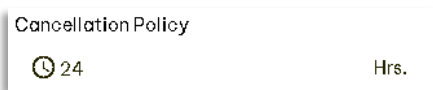


### 3. Appointment

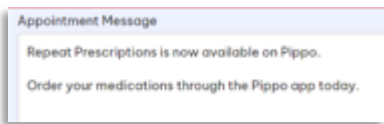


You can enable or disable appointment bookings using the toggle button.

**Cancellation Policy:** The Cancel button will not be displayed for the patient for any Pippo appointment they have that is within the time limit selected.



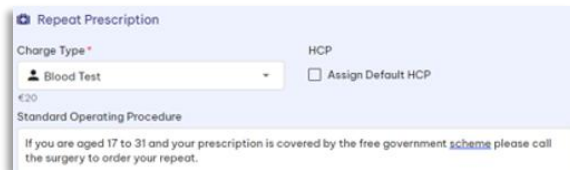
**Appointment Message:** This message is displayed when the patient books an appointment. (E.g., Emergency helpline numbers, general information).



### 4. Repeat Prescriptions (Additional Module)

**Please contact Support to enable Repeat Prescriptions.** Patients can request a refill of their repeat medications. Patients will be able to see printed prescriptions for the last 12 months. A pre-authorized payment will be taken via Billink at time of the request. Once completed from your PMS within 7 days the payment will be taken and added to the patient’s Account in your PMS.

- 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.



## Availability

Patients can book an appointment up to 6 weeks in the future. Same day appointments are not available. A pre-authorized payment will be taken via Billink at time of the booking. Once the booking is confirmed by your PMS the payment will be taken and added to the patient’s Account in your PMS.

Appointment types, durations, and charges from your PMS sync to Pippo on installation and every night.

Click **Availability** to view your PMS appointment types and to configure the appointment types you want available on Pippo.

Code	Description	Duration	Rate	B.Type	Status	New Patient	Enable
9	Bloods	10	€40	Both	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Bloods Availability
10	Bloods & Vit D	10	€60	Private	<input type="checkbox"/>	<input type="checkbox"/>	Bloods & Vit D
7	Flu & Covid Vaccine	10	€0	Both	<input type="checkbox"/>	<input type="checkbox"/>	No Charge Availability
4	Cervical Smear	10			<input type="checkbox"/>	<input type="checkbox"/>	
8	Childhood Vaccine	10			<input type="checkbox"/>	<input type="checkbox"/>	

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

**Edit Availability #Bloods** [Cancel] [Save]

Appointment Type: Availability

Private Charge Type \*  
 Bloods €40

Booking Type  
 Both

Opt out for Dependents

Duration: 10 (mins.)

Status:

New Patient:

1. **Private Charge Type:** Charge the private patient will be asked to pay for the Appointment Type.
2. **Booking Type:** Booking type selected will dictate which patients can book the appointment type.

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

**Edit Availability #Bloods**

Appointment Type: Availability

Private Charge Type \*  
 Bloods €40

GMS Charge Type \*  
 Bloods (GMS) €20

Notes  
 Please fast for 12 hours before your appointment.

**Practice Details**

Practice \*  
 Demo Practice

Appointment for Dependent [Add Dependent](#)



Appointment Type \*  
 Bloods

Charge Amount: €40

Note: Please fast for 12 hours before your appointment.  
 Please acknowledge the above to proceed

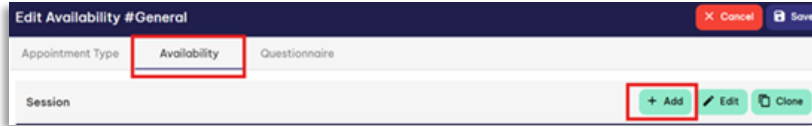
B) **HCP's Availability:** Click the **Advance** dropdown arrow to show all HCP's.



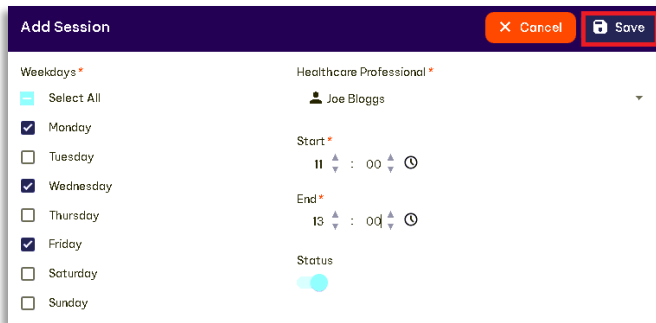
1. Healthcare Professionals: Toggle the status from  to  to enable the HCP.

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.

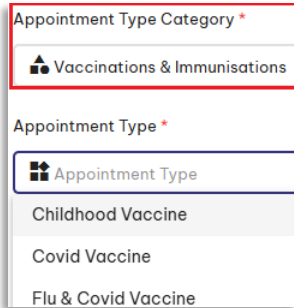
C) Click **Save**. Click Cancel to return to Availability. Repeat for each appointment type.



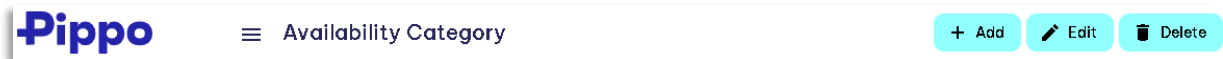
Click **Bookings** tab to view the availability that you have created to confirm it is correct.

## Availability Category (Optional)

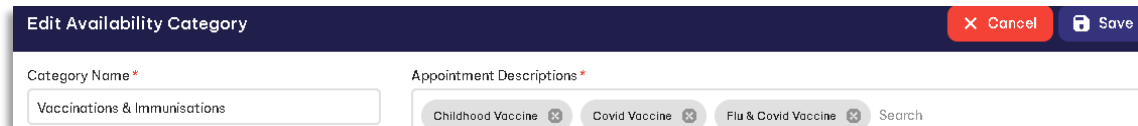
You can create categories to make it easier for patients to find the appointment type on Pippo e.g. Group Vaccinations and Immunisations category.



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



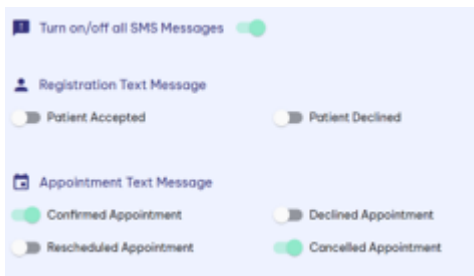
2. Enter the Category Name, select the required active appointment types and click **Save**.



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.

1 Practice Details 2 Date/Time 3 Confirmation

Practice Details

Practice \*

Demo Practice

Appointment for Dependant [Add Dependant](#)

Appointment Type \*

Flu & Covid Vaccine

Charge Amount: €0

Reason for Appointment

Notes - Please do not disclose any private medical details

Next Step

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.

Availability #Flu & Covid Vaccine

Cancel Save

Appointment Type Availability

Private Charge Type \* Booking Type Duration Status New Patient

No Charge Both 10 (mins.)

Opt out for Dependants

Notes

Note

Advance

Email Template Sms Template

Email Template Sms Template

Healthcare Professional	Private Charge Type	Amount	GMS Charge	GMS Amount	Status
Joe Bloggs	No Charge	€0			<input checked="" type="checkbox"/>
Jenny Bloggs	No Charge	€0			<input checked="" type="checkbox"/>

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

Appointment Type		Availability				
Session		<span>+ Add</span> <span>Edit</span> <span>Clone</span>				
Healthcare Professionals	Week Day	Start	End	Added Date	Status	
Jenny Bloggs	Thu, Fri	10:00	14:00	10/03/2026	<input checked="" type="checkbox"/>	
Joe Bloggs	Thu, Fri	10:00	14:00	10/03/2026	<input checked="" type="checkbox"/>	

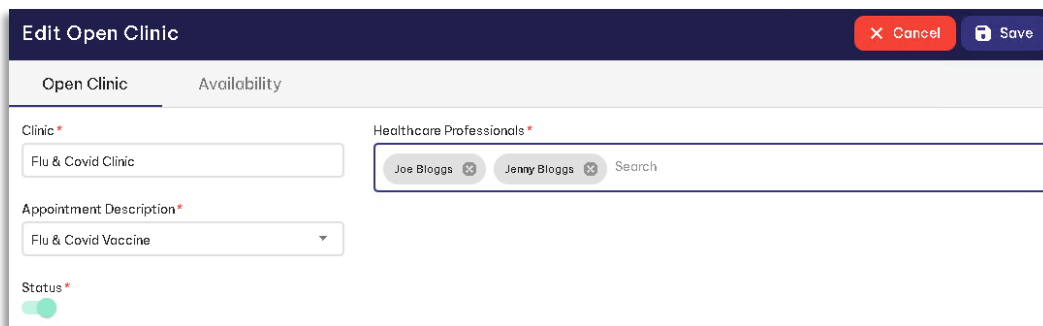
## Step 2: Create Open Clinic

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.

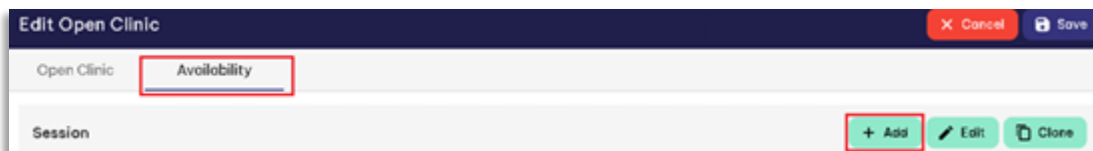


2. Select the Open Clinic and click 'Edit'.



Clinic	App. Description	Consultants	Status	Enable
Flu & Covid Clinic	Flu & Covid Vaccine	Joe Bloggs Jenny Bloggs	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>


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.

Week Day	Start	End	Added Date	Status
Thu, Fri	01/10/2026 10:00	31/10/2026 14:00	10/03/2026	On

- **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**.

**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 Core patients mobile number in the PMS.

The screenshot shows the 'Patient List' interface. At the top, there is a search bar with filters for First name (Adams), DOB (28/08/1974), Mobile no (353879232866), Email (john.doe@example.com), and Status. Below the search bar is a table with 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 G.P
Alex	Adams	28/08/1974	353879232866	wijami3208@artgulin.com	Declined	-	07/03/2024	P G.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'.

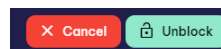


**CONFIRMED:** Double click to view the patients Pippo registration. Click **Block** to block the patient from logging into their Pippo account. **Your PIPPO account has been blocked by your practice. Please contact them for assistance.**

The screenshot shows the 'Patient Details' interface. It displays personal information for a patient named Alex Adams, born 28/08/1974, with a mobile number of 353879232866 and an email of john.doe@example.com. The patient's status is 'Accepted' and their patient type is 'Private (C.P)'. There are 'Cancel' and 'Block' buttons at the top right.

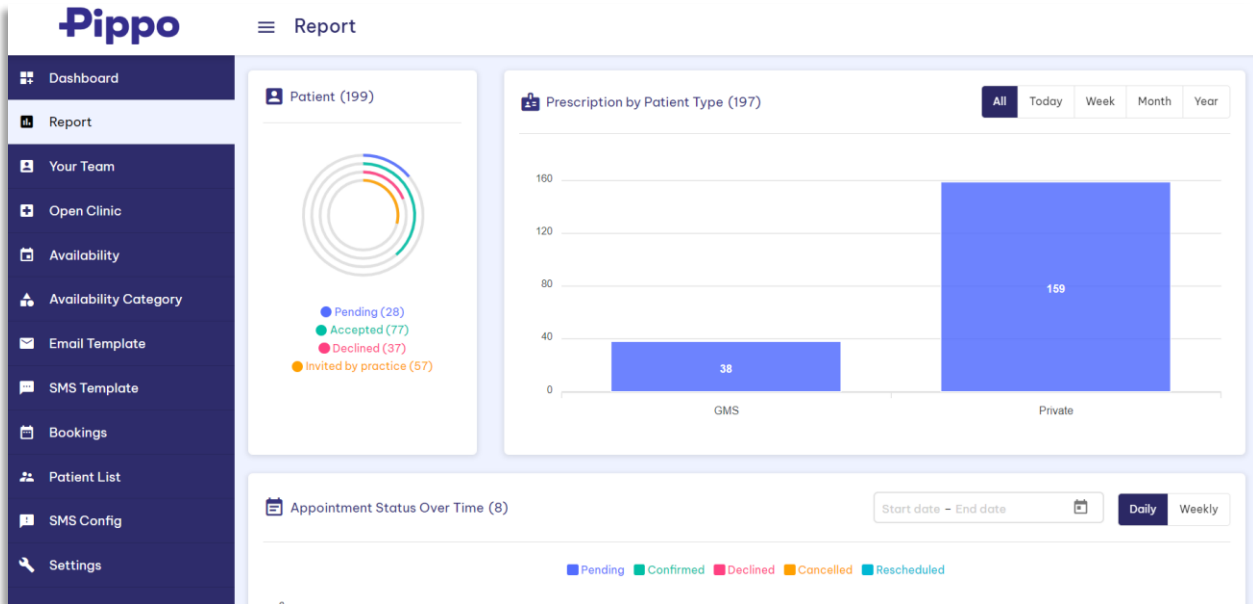
Patient Details			
First Name	Surname	DOB	Status
Alex	Adams	28/08/1974	Accepted
Medical Card No	Patient Type	Blocked On	Created On
-	Private (C.P)	-	07/03/2024

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 'Your Team' page displays a list of healthcare professionals. The table below shows the details for each team member, including their date of addition, name, email ID, and mobile number.

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 'Patient Update' page displays a list of patient demographic updates. The table below shows the details for each update, including the patient's name, the field that was updated, the original details, the updated details, the date of the update, and the source of the update.

Name	Updated Field	Original Details	Updated Details	Updated at	Source
Alex Patientus	surname	Patient	Patientus	09/06/2025	Patient via Pippo
Angel Clip	address,address...	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  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.

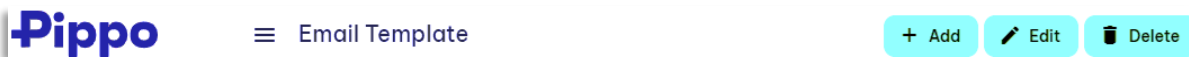
Edit the content as required. Choose the required placeholders from the list one at a time. Use the scroll wheel on your mouse to view all the placeholders.

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



- **Email Template**

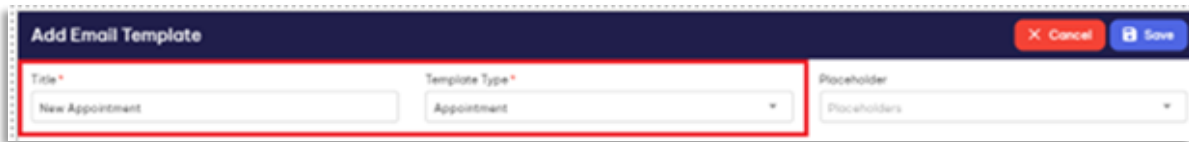
To create a custom email template, click 'Email Template' from the side menu, and then click 'Add'.



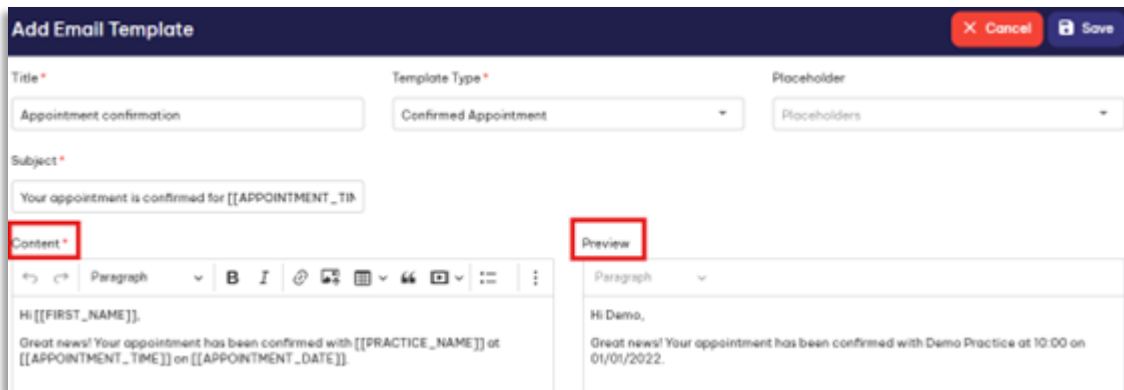
Fill in the below details:

**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.

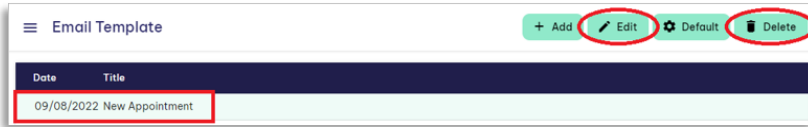


**Subject** – Type a subject or a heading that is relevant to this email template. Use placeholders by selecting them one at a time.



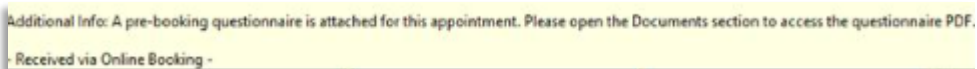
Click **Save**. Your custom Email template is configured.

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



## Questionnaire (Additional Module)

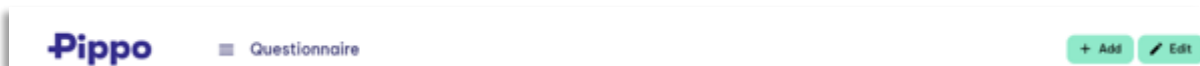
Click **Questionnaire** to add a prebooking questionnaire to an appointment type. The questionnaire is displayed for the patient to complete as part of the booking process and will be displayed in the patient's documents in the PMS.



Please contact Support if you want the Questionnaire module enabled.



1. Click 'Add'.

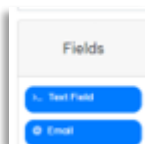


2. Enter a useful 'Name' for the questionnaire.

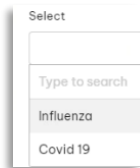
Name \*

Text 2

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

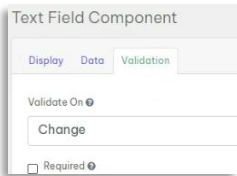


- a. Text field: One line text field.
- b. Text Area: Multi-line text field.
- c. Email: Only an email address with an @ symbol can be added.
- d. Number: Only numeric values can be added.
- e. Phone Number: Only Numeric values up to 10 digits can be added.
- f. Checkbox: e.g.  Are your Vaccines up to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

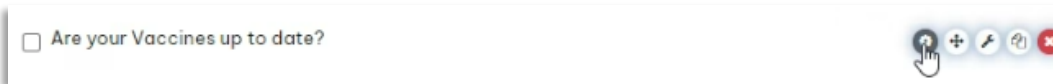





h. Radio: e.g. Yes or No answer.

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

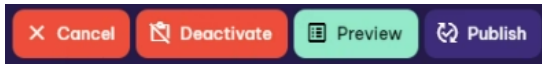


To modify a field after adding it, hover over the field and the menu will be displayed.



- Edit 
- Copy 
- Delete 

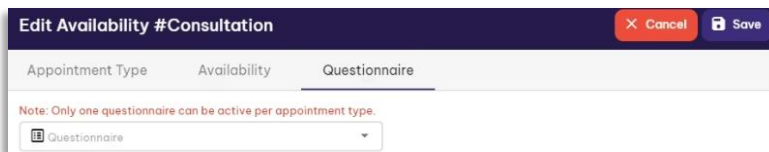
### Buttons:



- 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.