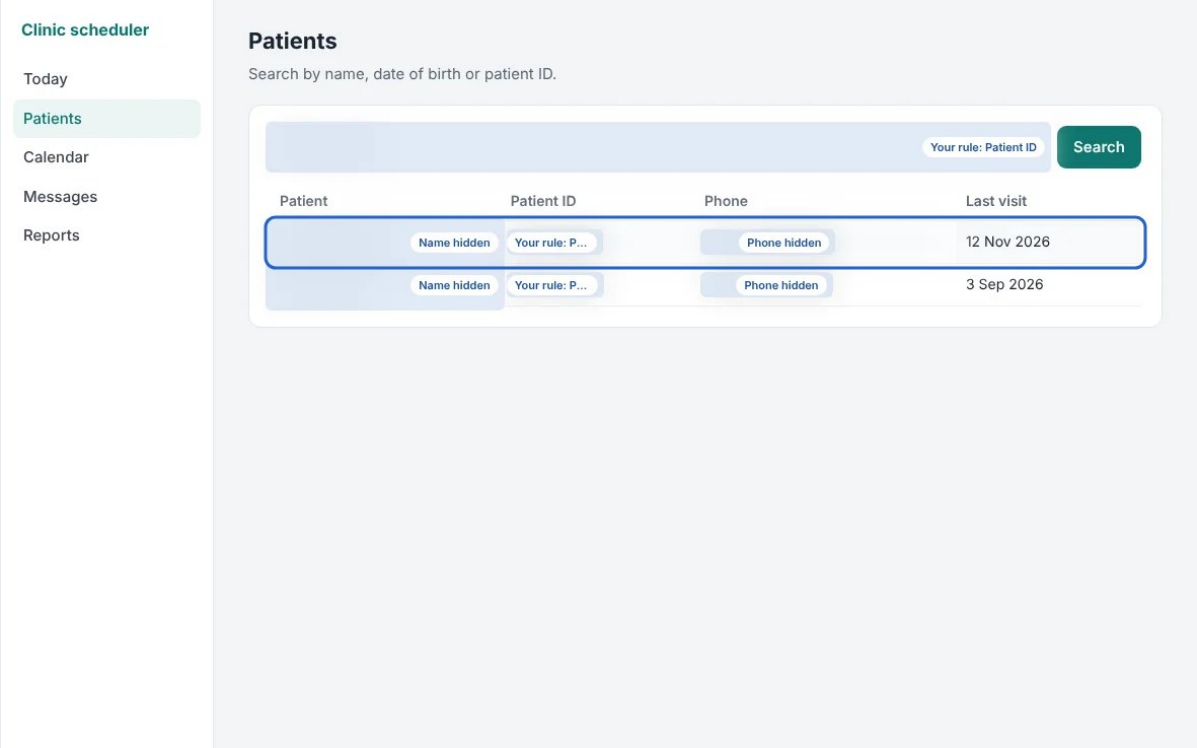
Book a follow-up appointment

7 steps · Updated November 25, 2026

For front-desk staff. Books a follow-up from the patient record and sends a text reminder. Takes about a minute.

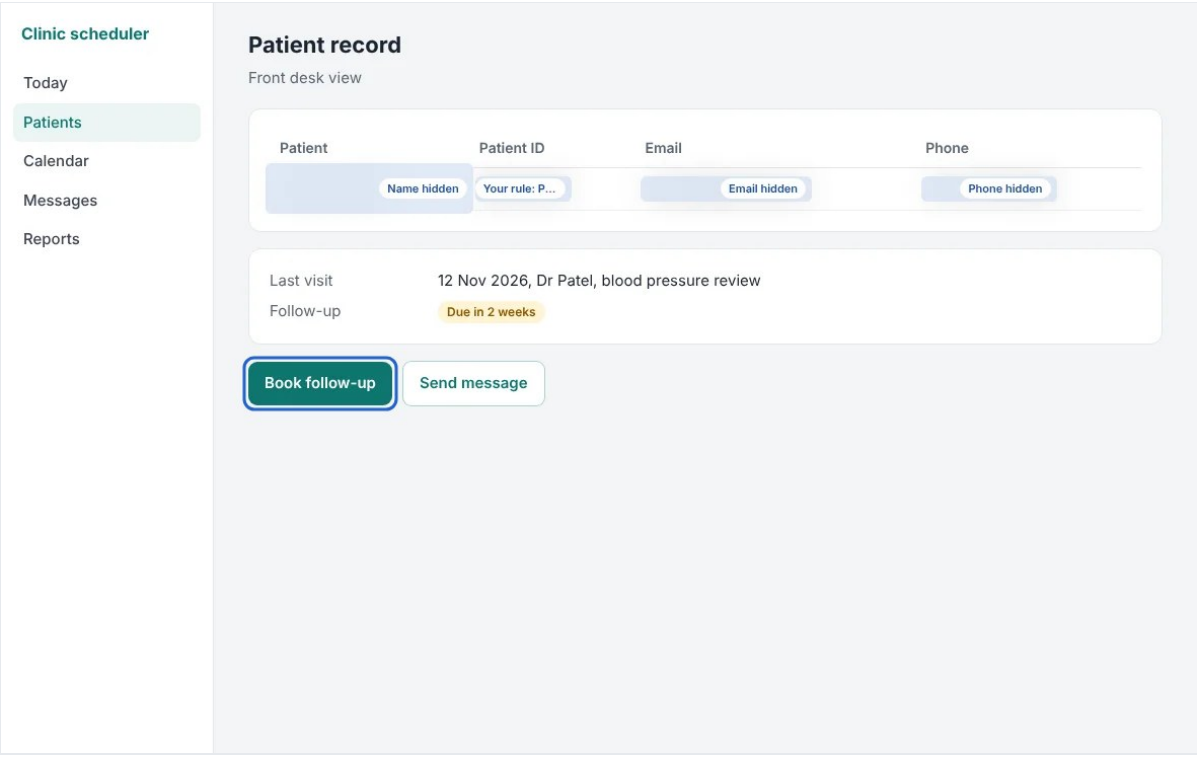
1 Open the patient’s record

Search by patient ID rather than name, so the right person comes up first.

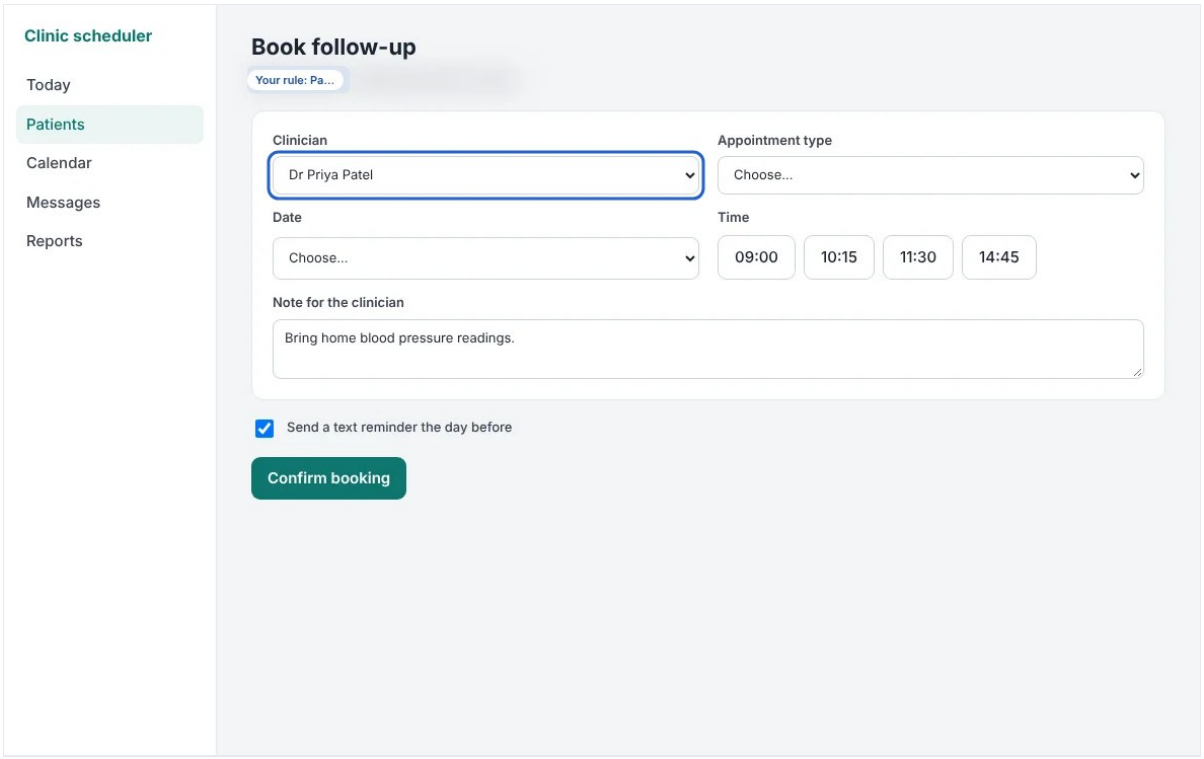


2 Click Book follow-up

Check the **Follow-up** line first: it says when the clinician wants to see the patient again.

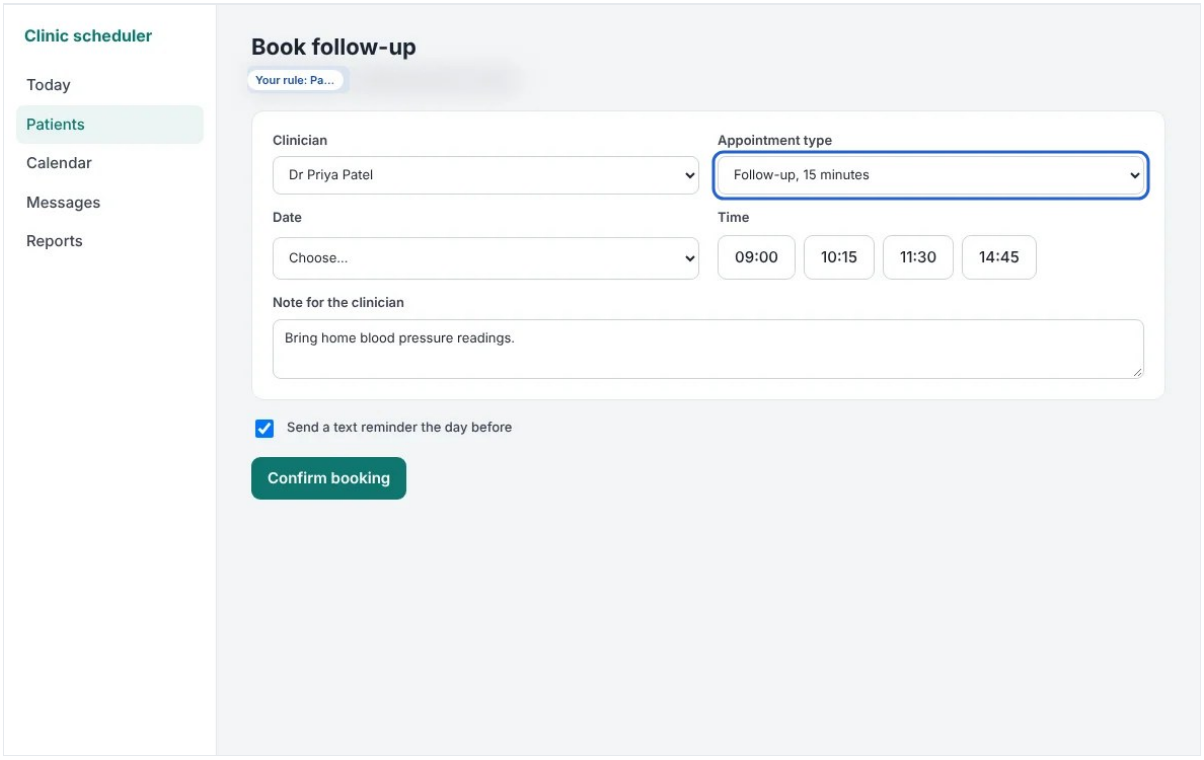


3 Choose Dr Priya Patel in Clinician

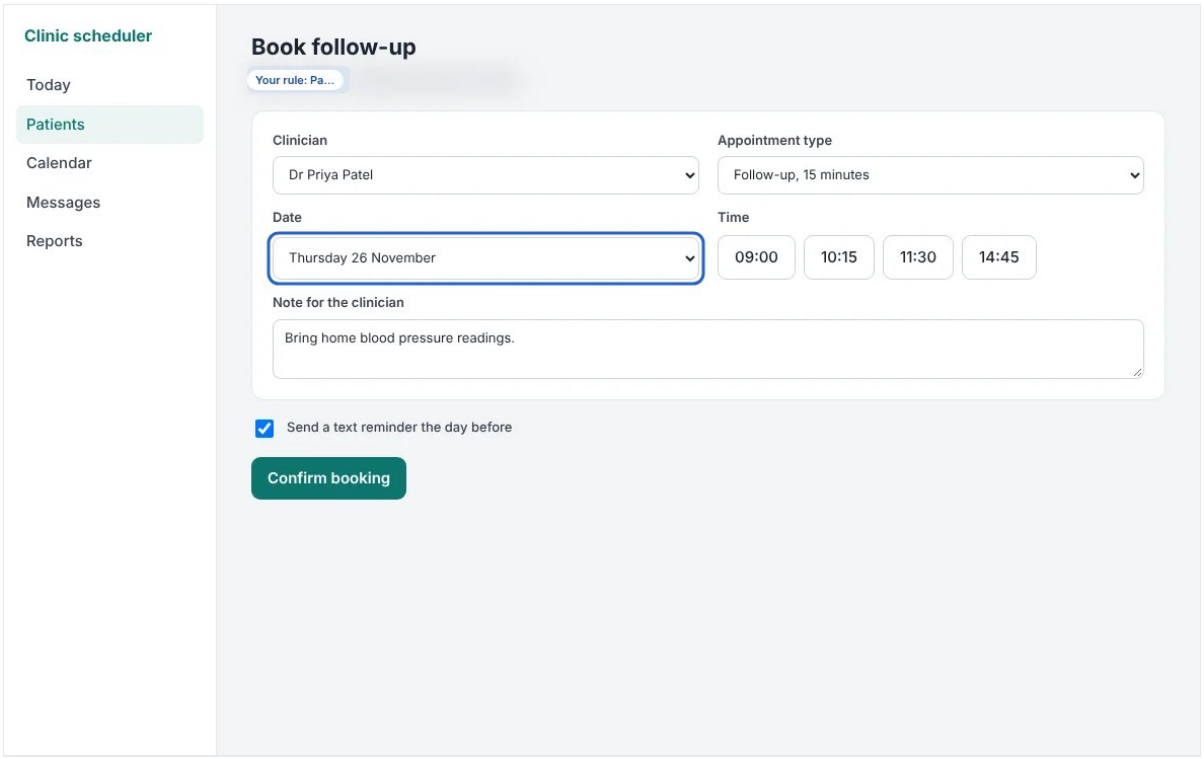


4 Choose Follow-up, 15 minutes in Appointment type

Choose 30 minutes only if the clinician asked for a longer review.

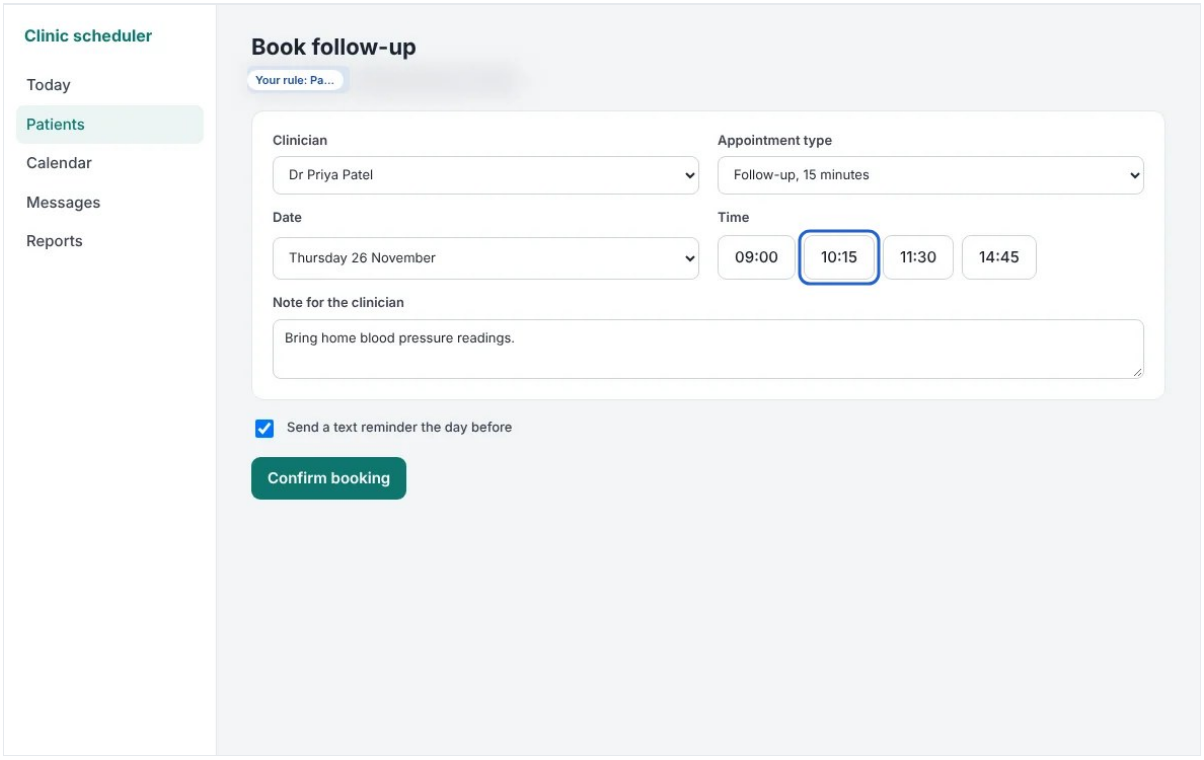


5 Choose Thursday 26 November in Date



6 Click 10:15

Pick a time the patient said suits them. Grey times are already taken.



7 Click Confirm booking

Leave **Send a text reminder the day before** ticked unless the patient has opted out of texts.

