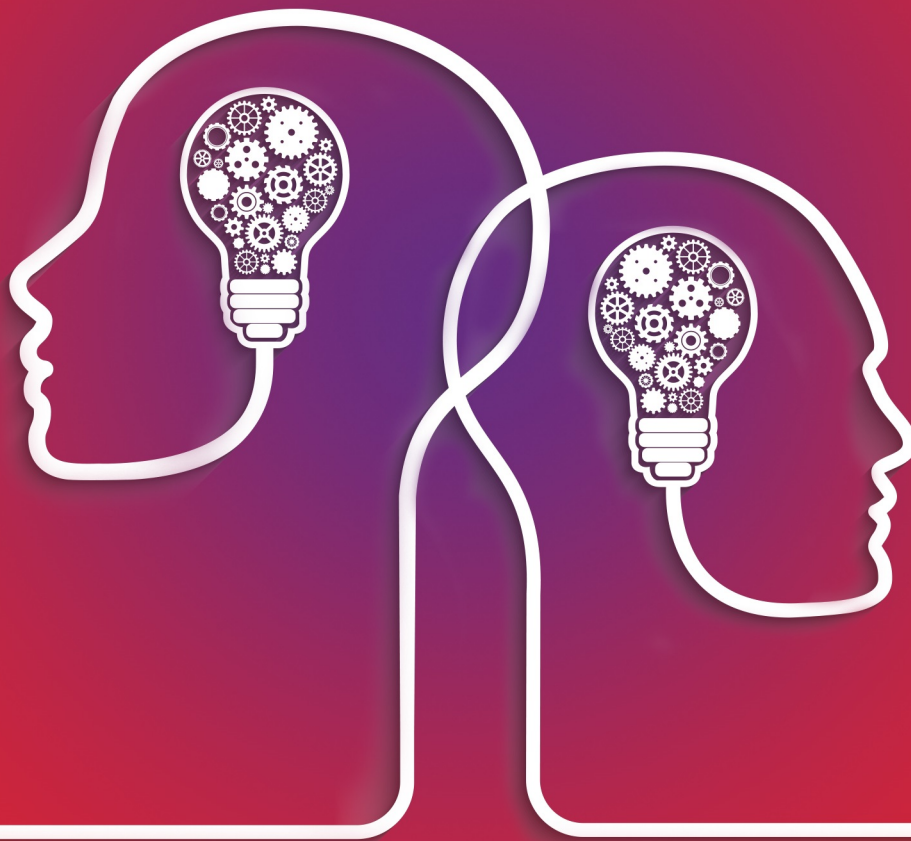
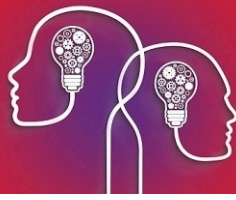


Bp VIP.net

Appointment Book Guide



VIP.net knowledge base 



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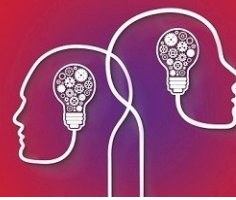
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Last updated: June 2021



Getting started with the Appointment Book

The appointment book workflow for Bp VIP.net covers all of the events from adding a new patient and booking an appointment through to processing payment by the patient.

Front desk staff within the practice usually perform the majority of appointment-related duties using the **Appointment book**, which provides an overview of all appointments for the practice.

From the appointment book, you can open the **Waiting room**, which shows the patients who have been arrived by the front desk and are waiting or have already had their consultation.

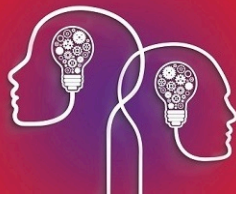
Before you can use the appointment book at your practice, you need to configure Bp VIP.net to suit your practice. Appointment book setup may have already been completed as part of your Bp VIP.net deployment. If so, you can start with [Working in the Appointment Book](#).

Setting up the appointment book requires:

1. Set the appointment book defaults for your practice.
2. Set up the appointment book, page-owners, and provider rosters.
3. Set up staging for the Waiting Room.

When booking appointments, you can:

1. Work from the appointment book to add new patients, book, search for, move, and cancel appointments.
2. Print surgery and general appointment day sheets for providers.
3. Stage patients from arrival to billing. The **Waiting Room** shows the stage of each patient who has been arrived.
4. Work from the **Waiting List**: move patients waiting for surgery to a free appointment slot.



Set up the appointment book

Setting up the appointment book for use requires setting up appointment book pages, rosters, booking types, and workflow defaults.

To successfully use the appointment book of Bp VIP.net, you need to set up several components:

- Create appointment book pages
- Set up provider locations, if your facility has multiple practices or rooms from which a provider consults. See [Set a provider's appointment book location on page 11](#) for more information.
- Add booking types for your practice
- Set waiting room staging defaults for your practice.
- Create rosters (only if your practice uses a rostering system for shifts)
- Create page-owner groups (optional).

You can also set up staging, which allows you to monitor patient movement through the process of arrival, consultation, and billing.

What is an appointment book page?

The appointment book is made up of pages of bookable appointment slots. Each page is 'owned' by a provider, a Bp VIP.net operator, or is a custom page:

- Provider pages show only the appointments booked for the **page-owner**.
- Operator pages are for Bp VIP.net users at your practice who do not have a provider record e.g., a nurse.
- A custom page is independent of both providers and operators. For example, your practice might have a general examination room which is used by all providers and is bookable by all operators.

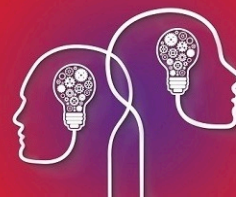
How does the appointment book default which provider should be charged?

When making notes or charging from the appointment book, Bp VIP.net will default to a provider based on configuration settings:

1. If you are charging from a provider page, Bp VIP.net will always default to the page-owner.
2. If you are charging from a custom page, Bp VIP.net will default to the **Link to Provider** field set for the [appointment type](#).
3. If there is no linked provider for the appointment type, Bp VIP.net will default to the **Provider** specified for the logged-in user in the **Setup Users** screen.
4. If you are charging from anywhere in Bp VIP.net other than the appointment book (for example, pressing F5 to open the **Consultation** screen), Bp VIP.net will default to the patient's Primary Provider in the **Patient Details** screen.

Create an appointment book page

1. Select **Setup > Appointment Book > Page-Owners**. The **Maintain Page-Owners** screen will appear.



2. Click **New**. Bp VIP.net will prompt for the type of page-owner. Select **Provider, Operator, or Custom** and click **Ok**. The **Details** tab will appear with the Provider or Operator's **Name** filled in, or the name of the page.

Page Owner - Cardiologist, Jen

Browse Details Rosters

Name Background Colour Text Colour

Hot Key

Inserted Slots

Max. inserted slots per regular timeslot Inactive Show Location

While adding Autotext is optional, it allows notes to be automatically added depending on pre-set conditions. When down-loaded from our Library, all Autotext used in the Appointment Book starts with an "A". When adding your own, following this format will make finding appropriate entries much easier. Autotext placed here populates the Notes column. Hint. Might have referral or contact details.

Use Refresh >>

Show Additional Column 2 Link To Booking Timeslot

Column Name

Column 2. Hint. If used, could be named Billing and in here a conditional Autotext might display an outstanding balance if greater than a set figure. If attached to a Booking, note any entry stays with the Patient when moved or cancelled.

Use Refresh >>

Show Additional Column 2 Link To Booking Timeslot

Column Name

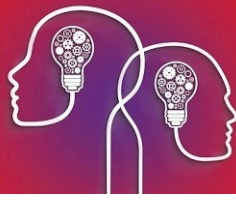
Column 3. Hint. Could be for the Page Owner's Messages. If attached to a Time Slot any note from Autotext, or typed in, stays with the Time and does not move if the patient cancels or is moved to another slot. Possibly used for personal messages.

Use Refresh >>

3. Select a **Hot Key** to quickly switch to this page from the appointment book .
4. Select a **Background Colour** and **Text Colour** to identify the page in the appointment book.
5. The **Max. inserted slots...** field indicates the maximum number of new slots that can be inserted after an existing slot.
6. Tick **Show Location** to display the page-owner's main Location along with their name in the list of tabs along the bottom of the appointment book.

Add columns to the page

Page-owners can add up to three additional columns populated by autotext values. For example, you could add a column that shows the referring doctor for booked patients.



7. The first column is always called 'Notes'. Click **Add** in the first column panel to open the **Choose Autotext** popup. Select an autotext value to populate the Notes column and click **OK**.
8. Tick **Use Refresh** to automatically update autotext values in this column while this page is being viewed.

Note: Depending on the complexity of the autotext, automatic refresh may impose a slight performance impact when viewing the appointment book.

9. Tick **Show Additional Column 2** to add a second column to the page. Enter a **Column Name**.
10. Select whether the column is linked to a **Booking** or the **Timeslot**.
11. Repeat to show a third column in this page.
12. Click **OK** to save the page for display in the appointment book.

Disable a page

Tick **Inactive** to remove a page from the appointment book but keep the record.

Create a roster for a page-owner

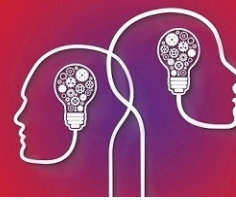
1. Select **Setup > Appointment Book > Page-Owners**.
2. Select the page-owner to create a roster for. Select the **Rosters** tab and click **New**. The **Roster Settings** popup will appear.

The screenshot shows a dialog box titled "Roster Settings for Cardiologist, Dr Jen @CLINIC". It contains the following fields and options:

- "How many weeks are there in this Roster Rotation?" with a text input field containing "2".
- "On what date should this roster come into effect?" with a date picker showing "11/12/2016" and a dropdown arrow.
- "On what Sunday should Week 1 of the Rotation be calculated from?" with a date picker showing "11/12/2016" and a dropdown arrow.
- "What is the usual daily opening time? (24hr format eg. 0800)" with a text input field containing "09:00".
- "What is the usual daily closing time? (24hr format eg. 1700)" with a text input field containing "18:00".
- "What is the usual Appointment Length?" with a dropdown menu showing "20".

On the right side of the dialog, there are two buttons: "OK" and "Cancel".

3. Complete the roster details for the page-owner and click **OK**. The **Roster** screen will appear, similar to how the roster will look from the appointment book.



Roster of Cardiologist, Dr Jen @CLINIC

Time		T	U	S	M	T	W	T	F	S
09:00	Available At: CLINIC									
09:20	Available At: CLINIC									
09:40	Available At: CLINIC									
10:00	Available At: CLINIC									
10:20	Available At: CLINIC									
10:40	Available At: CLINIC									
11:00	Available At: CLINIC									
11:20	Available At: CLINIC									
11:40	Available At: CLINIC									
12:00	Break At: CLINIC									
12:20	Break At: CLINIC									
12:40	Break At: CLINIC									
13:00	Break At: CLINIC									
13:20	Available At: BPTHEAT									
13:40	Available At: BPTHEAT									
14:00	Available At: BPTHEAT									
14:20	Available At: BPTHEAT									
14:40	Available At: BPTHEAT									
15:00	Available At: BPTHEAT									
15:20	Available At: BPTHEAT									
15:40	Available At: BPTHEAT									
16:00	Available At: BPTHEAT									
16:20	Available At: BPTHEAT									
16:40	Available At: BPTHEAT									

Selection Tools: Unavailable, Available, Break, Custom, Reset

Day Tools: Reset Day, Cut Day, Copy Day, Paste Day

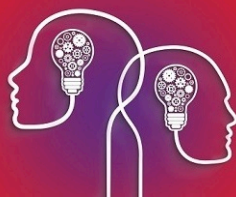
Week Tools: Reset Week, Cut Week, Copy Week, Paste Week

Location

Current Week: Week 1

Day Tabs: Sun, **Mon**, Tue, Wed, Thu, Fri, Sat

4. Select the **Current Week** at top right to set roster times for, if the roster cycle has more than one week.
5. Select the **Day** from the tabs along the bottom that you want to set roster times for.
6. Use Ctrl+click or Shift+click to select blocks of appointment slots. Select the appointment type to apply to the block of slots from the **Selection Tools** panel. To apply a user-defined appointment type, click **Custom** to open the **Modify Shift** popup.
7. Select the **Appointment Type** and **Located at** for this block of slots from the **Modify Shift** screen and click **OK**.



If you do not select a Location here, Bp VIP.net will default to the provider's **Unit** in Provider Details.

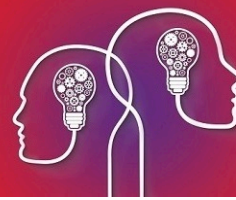
In the example screen shot in step 3, there is a break from 12:00 to 13:00, and Jen Cardiologist relocates to the Best Practice Theatre (BPTHEAT) from 13:00 to 17:00.

8. If the page-owner has a regular daily schedule, use the **Copy Day** and **Paste Day** buttons in the **Day Tools** panel to copy rostered days.
9. Use the **Copy Week** and **Paste Week** buttons in the **Week Tools** panel to copy whole rostered weeks, if the roster cycle has more than one week.
10. Click **Ok** to save the roster for the page-owner.

Create a page-owner group

You can group page-owners and filter the appointment book to show only members of a specific page-owner group. For example, you could group all cardiologist page-owners into a single 'Cardiology appointments' group.

1. Select **Setup > Appointment Book > Page-Owner Group**.
2. Click **New**. The **Details** tab will appear.
3. Enter a **Name** for the group and select a **Hot Key** for the appointment book to switch between groups.
4. Click **Add** and **Remove** to add and remove page-owners from the group.
5. Click **OK** to save the group.



Deactivate a group at any time by ticking **Inactive**. Disabling a page-owner group will not affect individual page-owners.

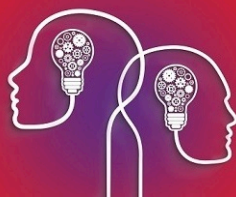
Add a booking type

Bp VIP.net is installed with several system booking types, but you may want to add additional types to reflect the different kinds of consultations available at your practice. You can only modify the background and text colour for the system types installed with Bp VIP.net.

1. Select **Setup > Appointment Book > Booking types** from the menu. The **Appointment Types** screen appears.
2. Click **New**, or select an existing type and click **Modify**. The **Details** tab will appear.

3. Complete the fields in the tab:

Field	Description
Name	Full descriptive name of the appointment type.
Inactive	Tick this checkbox to disable the appointment type, removing it for selection from menus.

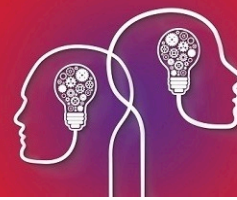


Field	Description
Abbreviation	Abbreviation shown in screens and the appointment book.
Background Colour / Text Colour	<p>Determines how slots of this type will appear in the appointment book.</p> <p>Use background colours to differentiate visually between different appointment types. For example, a background colour should make it quickly obvious to an operator if a slot is an operation type, a regular consult type, or a provider is on a break.</p> <p>The Background Colour and Text Colour should have high contrast to ensure the appointment book is readable by operators. Use light colour text against dark colour backgrounds or the reverse.</p>
Category	<p>Select:</p> <ul style="list-style-type: none"> ■ 'Available' for normal consultation types ■ 'Unavailable' for breaks, leave, and absences ■ 'Operations' for all booked operations.
Link to Provider	Default to this provider when making notes or charging from this appointment type in the appointment book.
Classification	<p>User-defined category for the type.</p> <p>You can use the classification to create rules for bookings. In the example screen above, the type 'New Patient' has a rule that appointment types of the Classification 'New' cannot be used more than twice in 24 hours. Bp VIP.net will alert a user that two New Patient appointments have already been booked for a day if a third booking is attempted.</p>
Duration	<p>Default booking duration for the type. This value overrides the Usual appointment length field set in the Facility Preferences screen.</p> <hr/> <p><i>Note: Best Practice Software recommend that appointment type durations should be a multiple of the usual appointment length value. For example, if the default practice length is ten minutes, default durations for any appointment type should be 10, 20, 30, 40, 50, or 60 minutes. This avoids overlapping appointments of different types in the appointment book.</i></p>

4. Click **Add** to add a booking rule for this appointment from the list of default rules. For example, you could limit the number of appointments of a type or classification booked in one day, or prevent the appointment type from being changed in the appointment book.
5. Click **Ok** to save the appointment type.

Set appointment book defaults

The **Facility Preferences** screen contains two tabs for setting appointment book workflow defaults. A Bp VIP.net administrator can adjust the settings to suit your practice. The settings in this screen are system-wide and apply to all users.



1. Select **Setup > Facility Preferences > General Preferences**. The **Facility Preferences** screen will appear.
2. Select the **Appointment Book 1** tab and change any fields. See [Set practice preferences](#) for more information.
3. Select the **Appointment Book 2** tab. Complete the following fields:
 - Usual opening time
 - Usual closing time
 - Usual appointment length.
4. See [Staging and the Waiting Room on page 21](#) for more information on the **Staging** and **Warnings** fields.
5. Click **OK** to save settings.

Set a provider's appointment book location

If a Bp VIP.net internal provider consults at different facilities, or different locations within a facility, you must create a provider record for each facility or location (called a 'unit' in Bp VIP.net) attended. This allows a page-owner to maintain a single page in the appointment book and ensures providers are billed correctly.

For example, say a provider provides services at one practice unit in the morning ('Clinic'), and in another such as an operating theatre in the afternoon ('Theatre'). From the **Providers** screen, you could use the **Copy Provider** function to copy the existing record for this provider, and change the **Name** of the **Unit** in the new record to 'Theatre'.

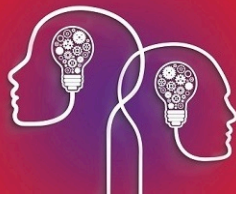
Check a provider's Page ownership and units

To check if a provider is a page-owner, inspect the **Page Owner** column in the **Providers** screen:

Name	At	Type	Provider No	Mobile	Address	Postcode	Page Owner
Cardio, Hamish	@Housto125	Cardiologist	2542165A	841 2569	Houston Medical Centre		Yes
Cardio, Stephen	@Housto125	Cardiologist			Houston Medical Centre		Yes
Cartel, Harvey	@Housto125	Orthopaedic Surgeon			Houston Medical Centre		no
Conger, George	@MUR OP	Ophthalmologist			Murdoch		Yes

Providers listed in bold have the **Primary** option ticked on the **Details** tab of the **Providers** screen. You must tick this setting if you want to create an appointment book page for a provider@unit combination.

If a provider has a + next to their record in the **Providers** screen, click the + icon to view all of the provider@unit records for that provider. In the example below, the provider 'Dunkin Ophthalmology' attends three units (indicated by the short code in the **At** column): CLINIC, BPTHEAT, and SYD HOSP.



Name	At	Type	Provider No	Mobile	Address	Postcode	Page Owner
+ Cardiologist, Jen	@CLINIC	Cardiologist	2150751A		Best Practice Clinic 125 Doncaster Avenue Kensington	2033	Yes
+ Dermatology, Harry	@CLINIC	Dermatologist	2405181H		Best Practice Clinic 125 Doncaster Avenue Kensington	2033	Yes
Nurse, Jack	@CLINIC	Nurse			Best Practice Clinic 125 Doncaster Avenue Kensington	2033	no
Nurse, Sally	@CLINIC	Nurse			Best Practice Clinic 125 Doncaster Avenue Kensington	2033	no
- Ophthalmology, Dunkin	@CLINIC	Ophthalmic Surgeon	2405171J		Best Practice Clinic 125 Doncaster Avenue Kensington	2033	Yes
	@BPTHEAT	Ophthalmic Surgeon	2405171J		Best Practice Clinic 125 Doncaster Avenue Kensington	2033	no
	@SYD HOSP	Ophthalmic Surgeon	2405171J		Sydney Hospital 125 Doncaster Avenue Kensington	2033	no
+ Sports Medicine, Tracy	@CLINIC	Specialist	2400731K		Best Practice Clinic 125 Doncaster Avenue Kensington	2033	Yes
Technician, Mark	@CLINIC	Orthoptist			Best Practice Clinic 125 Doncaster Avenue Kensington	2033	no

Each provider@unit record holds the same provider details, except the value of the **Unit**. When this provider's page is viewed in the appointment book, the page may show appointments from any of the three units shown here, and the provider can bill from any of these units.

*Note: If you are using Bp VIP.net AU, each provider@unit record must also have a unique **Provider Number**. Medicare associates a provider number with a provider and a location. If a provider in Australia begins consulting at an additional location, the provider must request a new provider number from Medicare.*

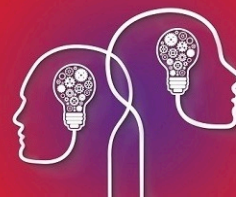
Show a provider's main location in the appointment book

You can set a provider's main location to show next to their name from the appointment book. The main location is the **Unit** selected in the Provider **Details** tab.

1. Select **Setup > Providers > This Clinic** and go to the provider's **Details** tab. Tick the **Primary** checkbox and click **OK**.

The screenshot shows the 'Providers (Id : 730)' details form. The 'Details' tab is active. The 'Primary' checkbox is checked and highlighted with a red box. Other fields include Surname (Cardiology), Title (Dr), First Names (Harry), Date of Birth (22/05/1950), Sex (M), Provider Type (Specialist), and Revenue (ANZ). The 'Communications' section has 'Letter' selected. The 'Provider Contact Details' section shows Building/Box, No/Street (2/130 Grantham Street), and Suburb/City (Hamilton).

2. Select **Setup > Appointment Book > Page-Owners**.
3. Select the page-owner you want to update and select the **Details** tab.

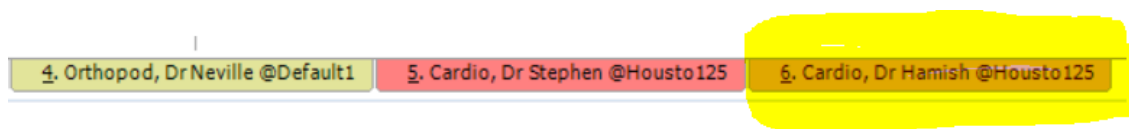


4. Tick the **Show Location** check box on the right hand side.

The screenshot shows a window titled "Page Owner - Cardio, Hamish @Housto125". It has three tabs: "Browse", "Details", and "Rosters". The "Details" tab is active. The form contains the following fields and options:

- Name: Cardio, Hamish @Housto125
- Background Colour: (empty)
- Text Colour: (empty)
- Hot Key: 6 (with a dropdown arrow and a green plus icon)
- Inserted Slots: Max. inserted slots per regular timeslot: 3
- Inactive:
- Show Location: (highlighted in yellow)

The provider's main location will be shown in the page-owner's tab along the bottom of the appointment book.



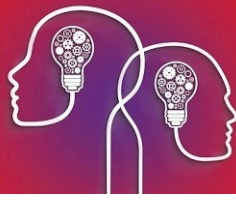
Change a provider's unit

If you have upgraded your installation to Bp VIP.net version 514 or higher, changing a page-owner's unit will affect the page-owner's roster, appointment book display, and future-booked appointments.

You may need to [create a new unit](#) in Bp VIP.net to assign to providers.

Note: Only internal providers who are page-owners will have their rosters updated when their unit is changed. If you update an internal provider who is not a page owner, you must manually update the provider's roster with the change of unit.

1. Select **Setup > Providers > This Clinic**. Select the provider you want to update and click **Modify**. The **Details** tab will be displayed.
2. Clear the value in the **Name** field of the **Unit** section.



Details More Internal HIC Online

Surname Title

First Names Internal

Known Name

Date of Birth Sex Inactive

Provider Type Primary

Credentials

Revenue

Facility Details

Name

Building/Box

No/Street

Suburb/City

Postcode State

Country

Phone

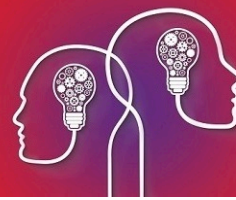
Fax

Unit

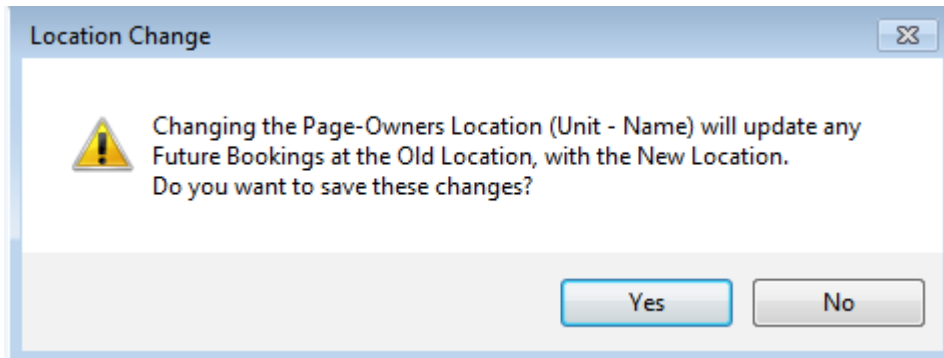
Name

If this provider is working in different Units in the same practice and would like to have multiple provider numbers or appointment book pages then enter a Unit here.

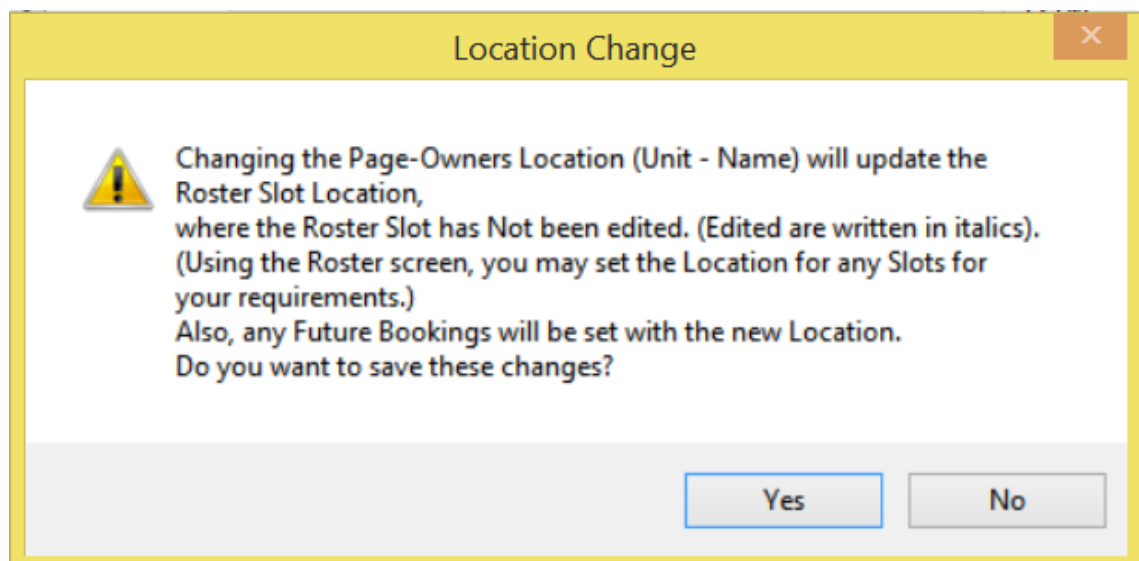
3. Begin typing the name of the new unit. A **Search** screen will appear.



4. Select the new unit and click **OK**. Bp VIP.net will respond depending on whether the provider is a page-owner:
 - If the provider is not the Primary page-owner, Bp VIP.net will alert that all future patient bookings for this provider at the 'old' unit in the appointment book will be updated with the unit selected in step 3. Only future patient **bookings** are affected; non-booked slots must be updated manually by [changing the provider's roster](#).

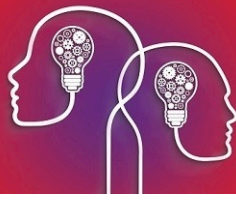


- If the provider is the Primary page-owner, Bp VIP.net will alert that: manual changes to a provider's roster will not be automatically updated with the location change; unchanged slots and blank slots in a provider's roster will be updated with the location change; and future patient **bookings** will be updated to the new location; non-booked slots must be updated manually by [changing the provider's roster](#).



5. Click **Yes** to continue. The **Name** field will show the new unit. Close the **Providers** screen.

From Bp VIP.net version 514 and later, all slots in the **Unit** column of an appointment book page must have an entry. If you have upgraded to version 514, slots that were blank will be assigned to the unit 'Default1' until the provider and roster details are updated.



Create a new unit

In Bp VIP.net, a unit is an organisation with a **Role** of 'Unit'. One or more units will be associated with a facility, which is usually considered the parent practice or company.

For example, a practice facility may consist of units comprising two specialist clinics, a theatre, and a stockroom. Units are associated with a facility from the **Organisation Details** screen.

You must create a new unit from the **Organisation Details** screen of the parent facility.

1. Press F2 to open the **Search** screen.
2. Select **Organisation Role**, enter 'facility' in the **Search** field and click **Search**.
3. Select **Internal** at the bottom of the screen to filter the **Search Results** screen. Select the parent facility from the **Search Results** screen and click **Ok**.
4. Press F3 to open the **Organisation Details** screen. Click **Add Unit** from the right hand side under the list of Associations. The fields in the **Organisation Details** screen will be cleared and the **Role** set to 'Unit'.
5. Complete the fields in the **Details** tab and click **Ok** to save the unit record and add the unit to the Associated Organisations list.

Do not select **Allow debts to be redirected** for units. Select **Bookable** if this unit can be booked from the appointment book. If the unit is a store for materials, select **Stock Room**.

Create an away-from-practice unit

Your practice may need a location to indicate occasions when a provider is not working at any unit. For example, a provider may be on leave, attending training, or attending a meeting or conference. You can create a unit following the instructions above and set the unit's **Name** to a descriptor like 'Away from practice' or 'No Location'.

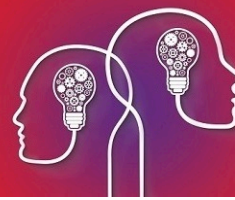
Update a provider's roster with a unit change

From Bp VIP.net version 514 onwards, manual changes to a provider's roster are shown in italics. Settings in plain text are derived from the provider's defaults. This distinction allows you to quickly see which roster components have been changed by a user and which components will automatically be adjusted if defaults change.

Any roster components in italics will **not** be updated when you change a provider's unit. You must manually update these components to the new unit.

1. Select **Setup > Appointment Book > Page-Owners**.
2. Select the provider whose roster you are updating and select the **Rosters** tab. Select the roster you want to update and click **Modify**. The provider's roster will be displayed.

The following screen capture shows an example roster. The top half of the roster is in italics, indicating that these times have been manually set and must be manually changed from this screen if you want to change the location. The bottom half of the roster in plain text indicates that these slots will be updated automatically if the provider's **Unit** is changed in **Provider Details**.



Roster of Cardio, Dr Stephen @Housto125			T	U	S	M	T	W	T	F	S
06:00	Cataract	At: MUR OP Anses: Plan, Peter									
06:30	Cataract	At: MUR OP Anses: Plan, Peter Surgeon: Ophthalm, Malcolm									
07:00	Cataract	At: MUR OP Anses: Plan, Peter Surgeon: Ophthalm, Malcolm									
07:30	Cataract	At: MUR OP Anses: Plan, Peter Surgeon: Ophthalm, Malcolm									
08:00	Cataract	At: MUR OP Anses: Plan, Peter Surgeon: Ophthalm, Malcolm									
08:15	Cataract	At: MUR OP Anses: Plan, Peter Surgeon: Ophthalm, Malcolm									
08:20	Cataract	At: MUR OP Anses: Plan, Peter Surgeon: Ophthalm, Malcolm									
08:30	Cataract	At: MUR OP Anses: Plan, Peter Surgeon: Ophthalm, Malcolm									
09:00	Cataract	At: MUR OP Anses: Plan, Peter Surgeon: Ophthalm, Malcolm									
09:30	Cataract	At: MUR OP Anses: Plan, Peter Surgeon: Ophthalm, Malcolm									
10:00	Cataract	At: MUR OP Anses: Plan, Peter Surgeon: Ophthalm, Malcolm									
10:30	Cataract	At: MUR OP Anses: Plan, Peter Surgeon: Ophthalm, Malcolm									
11:00	Available	At: Housto125									
11:30	Available	At: Housto125									
12:00	Available	At: Housto125									
12:30	Available	At: Housto125									
13:00	Available	At: Housto125									
13:30	Available	At: Housto125									
14:00	Available	At: Housto125									
14:30	Available	At: Housto125									
15:00	Available	At: Housto125									

3. Select the slot or slots you want to update the location for. Click **Location** on the right hand side, update the **Located At** field in the **Modify Shift** screen, and click **OK**.
4. If the roster has a cycle of more than one week, select a new week from the **Current Week** drop-down and repeat step 3 for each week in the roster.
5. Click **Ok**. The provider's page in the appointment book will be updated with the new locations.

Merge page-owners and providers

Depending on your version of VIP, you may have set up multiple providers to display along the bottom of your appointment book, to show provider bookings for different locations. For example:

0. Simpson, Dr Bradley @CONSULT

1. Simpson, Dr Bradley @T1

2. Simpson, Dr Bradley @T2

Why would I need to merge records?

If you upgraded to Bp VIP.net version 511 or later, the location that a provider is attending is shown in the **Unit** column of the appointment book, removing the need to maintain multiple page-owner records for visibility into provider location.

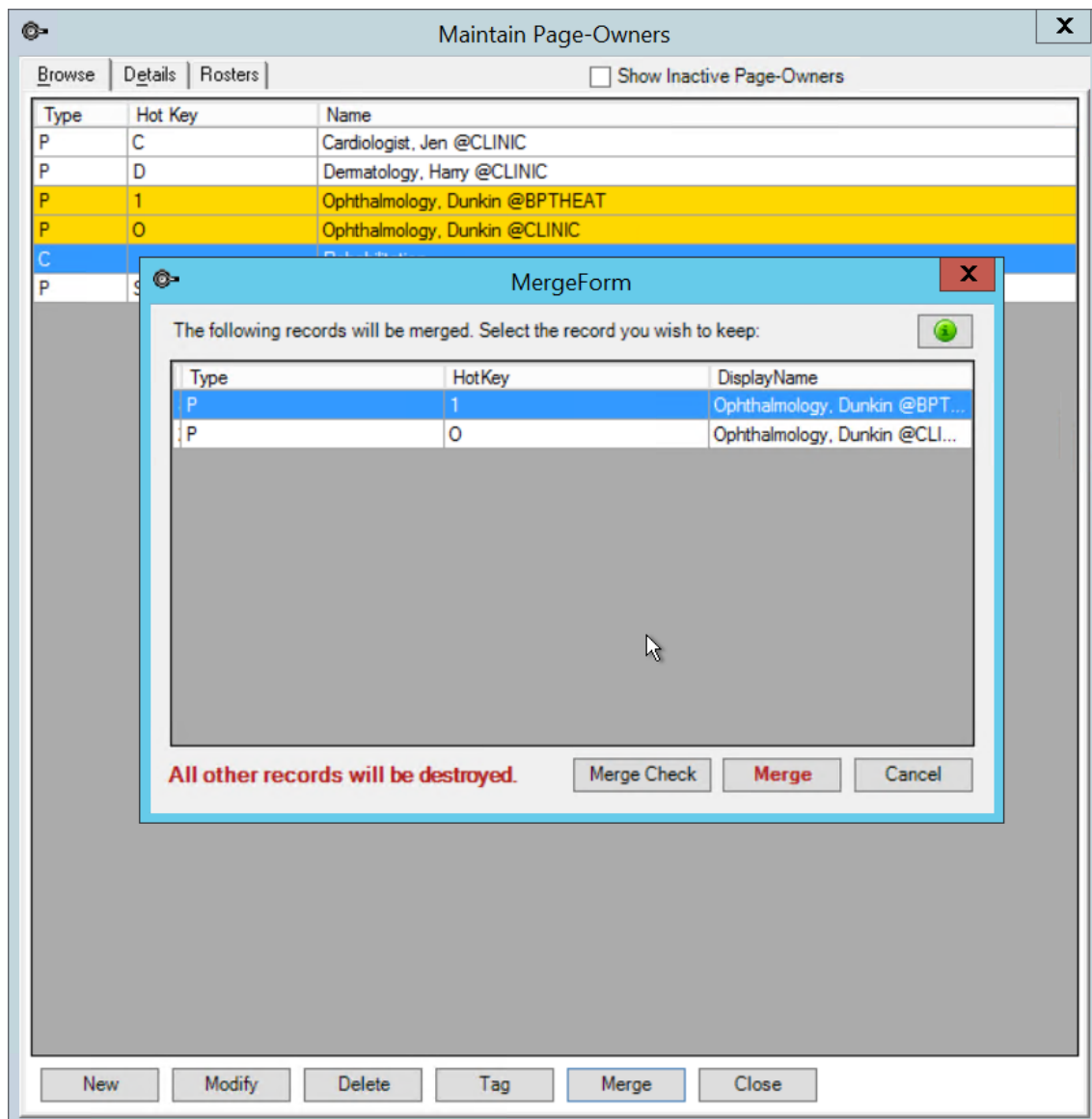
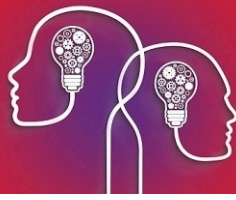
Bp VIP.net offers a merge facility for both providers and page-owners:

- Merge provider records to combine duplicate provider records that have referrals attached.
- Merge page-owner records to remove unnecessary tabs from the appointment book.

When you merge page-owners, Bp VIP.net will analyse the selected records for rostering and prompt the user for details to create a new roster for the merged provider.

Merge page-owners

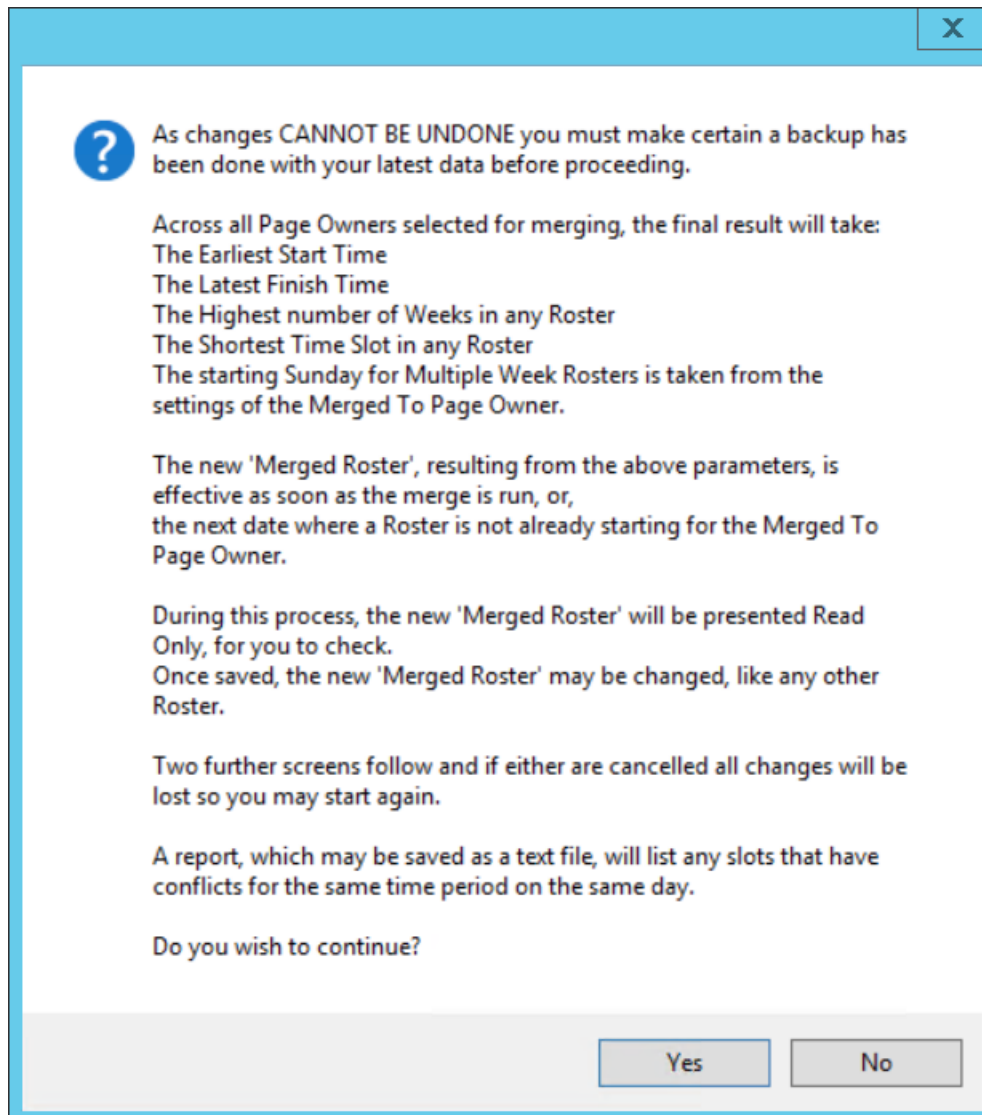
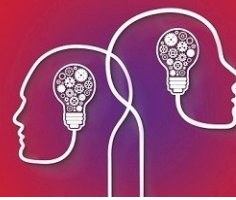
1. Select **Setup > Appointment Book > Page-Owners**. The **Maintain Page-Owners** screen will appear.
2. Click the first record you want to merge and click **Tag**. Repeat to tag all of the providers you want to merge.
3. Click **Merge**. The **MergeForm** screen will appear.



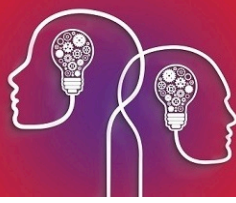
4. Click **Merge Check**. Bp VIP.net will not allow you to click **Merge** without clicking **Merge Check** first. Bp VIP.net will check the merging records for rostering conflicts.
5. The **Save As** screen will appear. Enter a filename and location to save the conflicts report text file.

The conflict file reports where, for the same day and time period, two or more slots have types other than 'Unavailable'. The file can be opened for reference in any text editor, such as Notepad, if you need to adjust the roster created for the merged user.

6. If you are satisfied there are no resolvable conflicts, click **Merge**. Bp VIP.net will display a screen summarising the merge process.



7. Click **Yes**. The **Roster Settings** screen will be displayed.



Roster Settings for Ophthalmology, Dr Dunkin @BPTHEAT

How many weeks are there in this Roster Rotation?	<input type="text" value="1"/>	<input type="button" value="OK"/>
On what date should this roster come into effect?	<input type="text" value="08/12/2016"/> ▼	<input type="button" value="Cancel"/>
On what Sunday should Week 1 of the Rotation be calculated from?	<input type="text" value="04/12/2016"/> ▼	
What is the usual daily opening time? (24hr format eg. 0800)	<input type="text" value="07:00"/>	
What is the usual daily closing time? (24hr format eg. 1700)	<input type="text" value="18:00"/>	
What is the usual Appointment Length?	<input type="text" value="10"/> ▼	

- The values in the screen are derived from analysing the shifts of the merged page-owners. Modify any values and click **OK** to complete the merge.

How Bp VIP.net merges the rosters

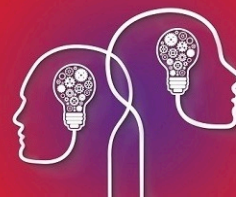
Bp VIP.net creates a new shift for the 'merged to' page-owner based on, from all tagged page-owners, the earliest start time, the latest end time, the greatest number of weeks in a shift, and the shortest slot size. The Sunday date for week 1 is the latest shift for the merge to page-owner. If the merge to page-owner does not have a shift, the previous Sunday is used.

Final derivation involves:

- The latest shift from each page-owner is used to create the new shift.
- For the merge to page-owner, every slot in the shift except 'Unavailable' is overwritten with the new shift.
- For the 'merge from page-owners, except for 'Operation' types, every slot from their shifts except 'Unavailable' will overwrite the new shift.
- If a multiple week shift is merged into a 1-week shift, additional shifts will be automatically created to satisfy the largest number, and all additional shifts will default to 'Unavailable' unless overwritten as above.
- If the merge from page-owners do not have shifts, the new shift is a copy of the merge to page-owner's shift.
- The merge from page-owners are selected in no particular order.

Merge providers

Important: Do not merge providers (Setup > Providers > This Clinic > Merge) if your intention is to [merge page-owners](#). Merging providers is not reversible; always back up the database before merging records.



1. Select **Setup > Providers > This Clinic**. The **Providers** screen will appear.
2. Click the + sign to expand a provider's provider@unit list, if necessary.
3. Click the first record you want to merge and click **Tag**. Repeat to tag all of the providers you want to merge.
4. Click **Merge**. The **MergeForm** screen will appear.
5. Select the record you want to keep as the final record. Click **Merge**.

The details in the selected record will be kept. Any other merged providers will be deleted.

Staging and the Waiting Room

Staging is the process of moving a patient through arrival, consultation, and billing, as well as any other stages that your practice requires. Staging allows you to monitor who has arrived and is waiting, and which appointments are ready to be ended.

The Waiting Room component of the appointment book shows all patients who have been arrived by staff and who have not had their appointment ended.

Set up staging for your practice

1. Select **Setup > Facility Preferences > General Preferences**. Select the **Appointment Book 2** tab.

Facility Preferences

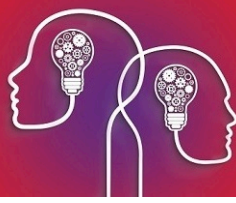
Facility | Snapshot | Provider Options | Appointment Book 1 | **Appointment Book 2** | Patients | Medical Desktop | My Comms | Communications

Note: These settings are system preferences only and can be overridden for each user as required under Setup-Personal Preferences

Staging	Stage	Stage Name	
<input checked="" type="checkbox"/>	Stage 1	Arrived	Settings...
<input type="checkbox"/>	Stage 2	Technician	Settings...
<input checked="" type="checkbox"/>	Stage 3	Provider	Settings...
<input checked="" type="checkbox"/>	Stage 4	Billing	Settings...
<input type="checkbox"/>	Stage 5		Settings...
<input checked="" type="checkbox"/>	Stage 6	Ended	Settings...
<input checked="" type="checkbox"/>	Stage Operation appointments also		

Warnings	
Initial Booking	ABMAK Message to be shown
Initial Stage 1 (Arrived)	
Stage 2 (Started)	ABSEE Message to be shown
Stage 3 (Ended Orthoptist)	
Stage 4	
Stage 5	
Stage 6 (Ended)	

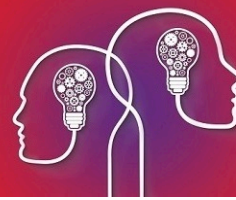
2. Tick the stages you want included in the Waiting Room. The first and last stage must always be present, although you can supply a **Stage Name** other than 'Arrived' and 'Ended'.
3. Tick **Stage Operation appointments also** if you want patients who arrive for operations to also appear in the Waiting Room.
4. Click **Settings** next to the first stage you are using. The **Edit Note** screen appears.



5. Select the **Image / Text to show in Column**. The icon or letter you select will appear in the **S** column of the appointment book, showing which stage the patient is at.
6. Tick **Use same colours as for waiting room** to show the staging icon in the same colours you select in step 8.
7. Select the action to take when a patient is moved into this stage: **No action**, **Enter** the patient into the Waiting Room, or **Leave** the patient from the Waiting Room. The final stage should be set to 'Leave'.
8. Do not select any **Auto-text for Warning** here. You will nominate a warning autotext for stages in step 12.
9. Tick **Allow immediate end of Appointment from this stage?** to allow operators to end appointments other than at the final stage.

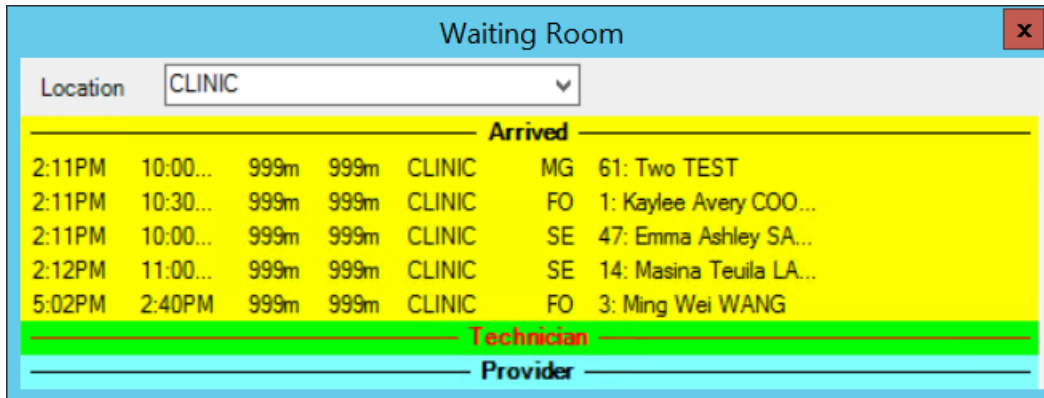
Tip: Best Practice Software recommend ticking this option for all stages. This helps prevent unended appointments from remaining in the appointment book.

10. Click **OK** to save the settings for this stage.
11. Repeat steps 4 to 10 for each stage that your practice will use.
12. In the **Warnings** section of the **Appointment Book 2** tab, specify a warning for each stage populated by an autotext. . For example, you could display an autotext that shows the referring doctor when making a booking, or if the patient has an outstanding balance owed when arrived.
13. Click **OK** to save staging settings. The Waiting Room will be updated.



Move patients through the Waiting Room

Press Ctrl+W from the appointment book to open the Waiting Room, which will appear by default in the top right corner.



Select a **Location** to see only the patients who have been arrived at that location. By default, the Waiting Room will show all patients at all locations.

The following keyboard shortcuts will move a patient through the Waiting Room when their appointment is selected:

Shortcut	Action
Ctrl+A	Arrives a patient, or unarrives an arrived patient.
Ctrl+S	Moves a patient to the next stage.
Ctrl+Backspace	Moves a patient to the previous stage.
Ctrl+E	Ends the appointment.

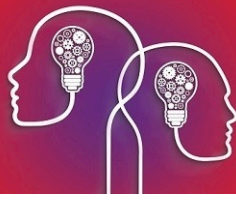
You can also select a patient in the Waiting Room and click and drag to move a patient between stages.

Add a new patient

Patients are normally added from the appointment book or **Search** screen, but Bp VIP.net also provides a Kiosk feature to enable patients to complete their own details while waiting.

Medicare and DVA setup

For Australian practices, several fields in the patient demographics are necessary for successful online validation and claiming. Download this [Quick Reference Guide PDF](#) for a summary of the fields you need to complete and how to troubleshoot online Medicare and DVA validation.



Add a patient

1. Press F2 to open the **Search** screen. Enter the new patient's name in the **Search** field and click **New Patient**.

If you are in the appointment book and booking an appointment for a new patient, begin typing the patient's name as 'surname, first name' in an available slot and press Enter. Bp VIP.net will respond that no records have been found. Click **Yes** to create a new patient.

2. The **Patient Details** screen is a mix of predefined and user-definable forms (UDFs). Depending on how your practice has set up Bp VIP.net, your **Patient Details** screen may have different fields, or have a different number of tabs on the right hand side.

Patient Details

Surname: Eroll Building/Box: No/Street: 40 Kurrajong Avenue
Title: Mrs Sex: F No/Street: 40 Kurrajong Avenue
First Name: leabelle Suburb/City: Leeton
Middle Name: Known: lssy Postcode: 2705 State: NSW
Date of Birth: 30/10/1967 45y Country: Australia

Employer: Occupation: Retired Ethnicity: Home: 61 02 66995522
Mobile: 61 045265362 TXT Opt-in
Business: 61 Fax: 61
Other: 61 Email: Husband: Frank Eroll.

Warning: Contacts: MED: Exp: Bulk: Feescaler: DVA FEE, DVA
DVA: TX900323 White Exp: Subsidiser: DVA SUB, DVA
HCC: Exp: Health Insurer:
PMS: Exp: HF Policy No.:

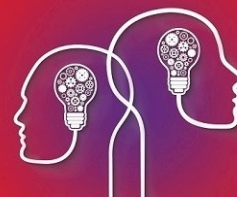
Providers: Family | Financial |
 Lead Provider
Dermatology, Harry Dermatologist 1
Culbert, Jodi General Practitioner 2
Harris, Elizabeth General Practitioner 3

Provider Number: 4019235K
Location: @Peter Street Medical Centre
Peter Street Medical Centre 128-132 Peter Street Wagga Wagga 2650
Business: 02-6939-7397
Fax: 02-6921-2847

Easyclaim OPV Easyclaim OCV HI Verification OK Cancel

Tip: You only need the **Surname** and **First Name** fields completed to be able to save a patient record. This allows administrative staff to book new patients quickly and collect details from the patient later.

3. Complete the details in the non-tabbed sections of the form. Anything entered in the **Warning** text box will be displayed in the warning field on the Information Bar when this patient is selected. Use the text box with green background to record miscellaneous information about the patient.
4. Select the **Providers** tab, which records all of the providers (internal, external, and referring) who are involved in the health care of the patient.



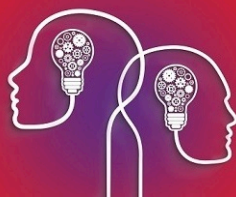
5. Click **Add** to search for a provider to add to the list. If a provider is the usual provider for a patient, tick **Lead Provider**. Provider types are indicated by the icons to the left:
 - The provider in bold type is the Lead Provider.
 - A house icon indicates a provider at this clinic.
 - A hand pointing leftwards indicates an external provider who has referred this patient **to** an internal provider.
 - A hand pointing rightwards indicates an external provider who has been referred **from** an internal provider.
6. The **Referrals** button opens MyComms (F4) at outgoing referrals, so you can create a referral from the **Patient Details** screen if necessary.
7. Select the **Family** tab, which saves next of kin and redirection details.
8. Click **Join** to add a patient or associate to the patient's family list. Select the **Relation**, the **Ext. Role**, or both for the added family member.
9. The **Redirect to** field indicates that invoices for this patient should be redirected to the patient or organisation selected here. For example, a young patient may redirect to a parent's account, or an employee may refer billing to their employer organisation.
10. The **Account Holder** field indicates that another patient or organisation is responsible for accounts associated with this patient.
11. Click OK to save the patient record.

Record patient and account addresses

When you are entering the address details for a patient, always tab out of a **street** or **suburb** field after you have made a selection. This will automatically populate the postcode, state and country fields. Check that these fields are not empty before you save the patient record: address details are important for billing and day surgery stays.

You can also record an account address that is different to the patient or organisation's normal mail or residential address. Click the chevron > next to the **Building/Box field** at the top of the screen. The **Account Details** screen will appear with address fields.

The screenshot shows the 'Patient Details' screen with an 'Account Details' pop-up window. The 'Patient Details' screen has tabs for 'Providers', 'Family', and 'Financial'. The 'Family' tab is selected. The 'Lead Provider' checkbox is unchecked. The 'Dermatology, Harry' icon is visible. The 'Building/Box' field has a chevron > next to it. The 'Account Details' pop-up window has a title bar with a close button (X) and a search icon. The 'Account Details' window has the following fields: Name (Enroll Family Account), Building/Box (231), No/Street (Gardeners Road), Suburb/City (Rosebery), Postcode (2018), State (NSW), and Country (Australia). There is a 'Close' button at the bottom right of the pop-up window. The 'Patient Details' screen also has a 'Home' field with value 61, a 'Mobile' field with value 61, a 'Business' field with value 61, a 'Fax' field with value 61, an 'Other' field with value 61, and an 'Email' field. The 'Provider Number' is 048339CH and the 'Location' is @Bondi Road Doctors.



A patient's account address, if recorded, will be used in Medicare and ACC claims. You can also insert an account address using lookup fields in a template or autotext.

Deactivate a patient

1. Open the **Patient Details** screen for the patient.
2. Tick **Deactivate on** at the bottom of the screen. Bp VIP.net will ask you to confirm that you want to deactivate the patient. Click **Yes**.
3. Enter a date to deactivate the patient (press Ctrl+d for today's date).
4. Select a **Reason** for the deactivation, for example, the patient has left the practice or has passed away. Click inside the **Reason** field and press Ctrl+L to add additional reasons.

You can reactivate a patient at any time. Deactivated patients do not appear in list screens and reports unless the 'Show Deactivated' option is ticked.

Working in the Appointment Book

After you have set up the page-owners and rosters that comprise your appointment book, Bp VIP.net offers numerous shortcuts for staff members to quickly book appointments, look up patient information, and move patients through the consultation process.

Bp VIP.net provides different views of the appointment book, ranging from time periods of less than 24 hours to a year, so that operations can switch between views depending on the operator task (for example, booking ten-minute appointments on the daily view, or blocking out annual leave on the yearly view).

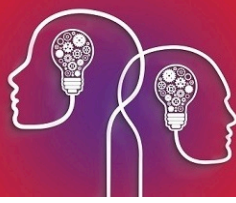
Appointment book shortcut keys




The following shortcuts work when the appointment book is open and has focus. Most of these options are also available from the right-click menu.

Shortcut Key	Action
Ctrl+F12	Opens the Appointment Book from the main screen.
Ctrl+T	Selects today's date and current time.
Ctrl+F	Opens the Find Appointment Slot screen to search for a free appointment slot or search for a booking by text.
Ctrl+O	Toggles the appointment book to show the entire 24-hour period. <i>Tip: This allows operators to book times outside of normal opening hours. Operators will have to change the type of an Unavailable appointment to make a booking for outside-of-hours-slots.</i>
Ctrl+B	Toggles the Availability Bar on the right hand side of the appointment book.









Shortcut Key	Action
Ctrl+J	Scrambles the patient names to prevent them from being displayed to unintended viewers.
Ctrl+L	Opens the Daily Overview screen.
Ctrl+M	Opens the Monthly Overview screen.
Ctrl+Y	Opens the Year Planner screen.
Ctrl+Enter	Inserts a booking in the selected slot for the patient in the snapshot.
Ctrl+N	Finds next available slot of any kind.
Ctrl+X	Cuts, pastes, and copies a booking. These operations will appear in a booking's audit log.
Ctrl+V	Cut or copied and pasted bookings are considered a 'rescheduled' booking.
Ctrl+C	
Ctrl+D	If the focus is in a date field, Ctrl+D will select today's date. Otherwise, opens the Operation Details screen for operation type bookings.
Ctrl+U	Opens the Audit Log for a booking.
Ctrl+P	Opens the Print Bookings screen.
Ctrl+G	Flags a booking. The meaning of a flag is practice-dependent.
Ctrl+W	Opens the Waiting Room .
Ctrl+A	Arrives a patient. Use on an arrived patient to unarrive the patient.
Ctrl+S	Moves a patient to the next stage.
Ctrl+Backspace	Moves a patient to the previous stage.
Ctrl+E	Ends the appointment.
Insert	Inserts a slot after the selected slot (creates a double booking).
Ctrl+I	
Delete	Deletes the selected booking, if permitted by the page-owner.
+	Extends the selected booking by the default duration.
-	Retracts the selected slot by the default duration.
/	Select a date.
*	Select a time.

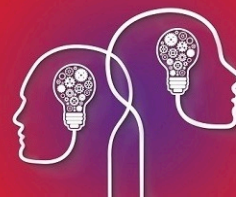


Shortcut Key	Action
Space bar	On an empty slot, opens the Search screen to find a patient and open the patient's Appointment History . On a booking, opens the patient's Appointment History .
	Moves to the next calendar day for the Provider's Appointment book.
	Moves to the previous calendar day for the Provider's Appointment book.
	Moves up and down in the Appointment book column.
Tab	Moves to the next column in the Appointment book.
Shift+Tab	Moves to the previous column in the Appointment book.
Home	Selects first slot on selected Appointment book day.
End	Selects last slot on selected Appointment book day.

What do the icons in a booking slot mean?

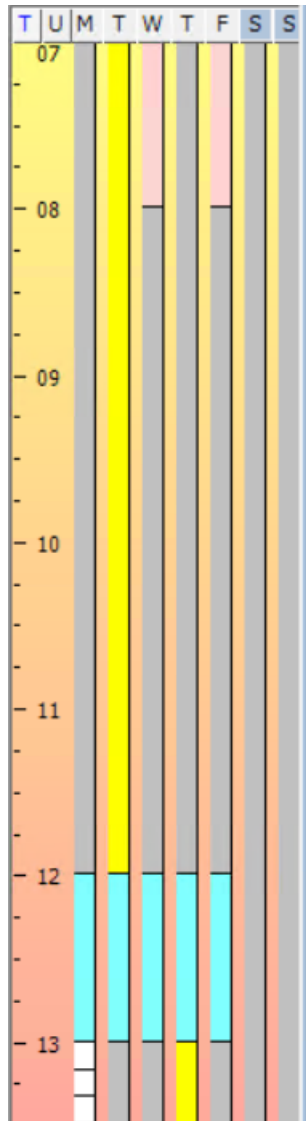
As a patient moves through booking, consultation, and billing, icons will be added to the right hand side of the **Booking** column.

Icon	Indicates
	Red — billed but not paid Red / Gold — bill partly paid Gold — bill fully paid. This might be a private, bulk-billed, or fully redirected consult.
	Doctor's notes have been entered for this booking.
	Doctor's notes have been entered and completed.
	SMS message has been sent to this patient from clinic.
	Appears over the phone icon. From left to right: patient has replied 'Yes', patient has replied 'No', patient reply unknown.
	Slot has been flagged (Ctrl+G).



Change the type of view

To the right hand side of the appointment book is the Availability Bar, which shows a page-owner's availability throughout the week.

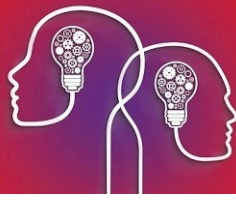


The first two columns are titled 'T' and 'U'.

Click on the **T** to view the availability bar by appointment type colour (for example, if you need to know if a provider is available for a specific type of appointment or operation). Click **U** to view the availability bar by Location colour (for example, if you need to know where a provider will be at that time).

Press Ctrl+B to toggle the availability bar through:

- the following week for current page-owner
- the current day for all page-owners



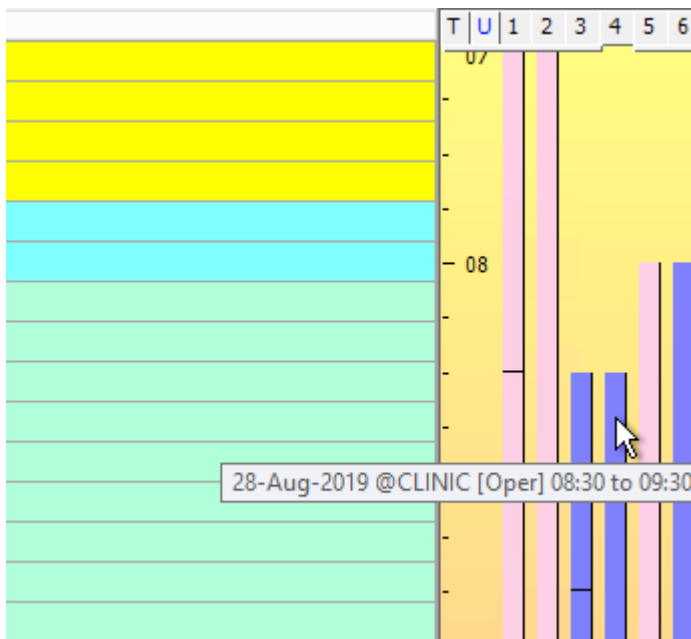
- the current day for current page-owner. This option shows the entire day without the need to scroll between opening and closing times.

You can also open other views from the appointment book:

- **Daily Overview (Ctrl+L)** — 24 hour view without columns. You can filter by page-owner, appointment type, and location, and save a 'view profile' to load at any time. You can also remove empty slots from display for clarity.
- **Monthly Overview (Ctrl+M)** — Monthly view for a single page-owner. The monthly view also contains the Waiting List on the right hand side, which shows patients waiting for an available appointment. See [Working in the Waiting List on page 34](#) for more information.
- **Year Planner (Ctrl+Y)** — Yearly view for macro-planning your practice's timetable, such as entering extended leave periods, public holidays, and practice closing times.

View a provider's location in the tooltip

In the availability scrollbar and the Monthly Overview, you can hover the mouse over a time to view the page-owner's location at that time in the mouse tooltip.

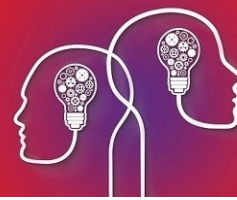


Use the calendar bar

The Calendar bar along the top of the appointment book lets you jump forward and back in time and apply some filters.



From left to right:



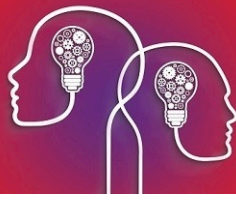
Button	Action
	Refresh the appointment book page.
	Go back one month, week, or day. Right-click to select the number of months, weeks, or days to go back.
	Go to today's date.
Mon, 09 Jan 2017 8:00 AM	Go to the selected date and time.
	Go forward one day, week, or month. Right-click to select the number of days, weeks, or months to go forward.
(All) J. Cardiologist, Dr Jen (Select a page-owner group from the first list to display only members of that group. Select a page-owner from the second list to go to that page.
	Opens the Waiting Room.
	Toggles the availability bar.
Week: 1	Shows which week in the page-owner's roster cycle is being shown.
<input type="checkbox"/> Deleted?	<p>Toggles whether deleted appointments are shown. This includes all reasons for deleting an appointment, including:</p> <ul style="list-style-type: none"> Cancelled Did not arrive Rescheduled Booked in error A reason manually entered by operator. <p>This checkbox is ticked by default if the Facility Preference option Show cancelled bookings in <u>strikeout font</u> is ticked.</p>

Annotate or block out an appointment

You can block out an appointment slot without booking an actual appointment. For example, a provider may have to leave the practice at short notice.

Select the slot and type text in the **Booking** column. End the text with a full stop and press Enter. The slot will be blocked out and display the text you entered. To edit a blocked-out slot, double-click the empty slot or press Enter to open the **Edit Booking** popup.

Note: The text must end with a full stop, otherwise Bp VIP.net will assume you are searching for a patient and open the **Search** screen.



To annotate an empty slot, select the slot and type text into the **Notes** column, or any column your practice has added to the appointment book.

Change the appointment type or location

You can override the rostered appointment type from the appointment book. For example, last-minute or one-off roster changes might require a block of unavailable appointment slots to be made available, or you might need to schedule an out-of-hours appointment.

Change a single slot

Click in the **Type** column, click the down arrow that appears, and select the new appointment type from the list.

Change a block of slots

1. Click and drag in the **Booking** column with the mouse to select the block of slots you want to change.
2. Right-click in the selected block and select **Change Type**. Select the new appointment type from the list.

If you changed the type to an operation, the **Operating Details** popup will appear. Select a unit, anaesthetist, and surgeon for the operation type and click **OK**.

To change the location, right-click in the **Booking** column and select **Change Unit**. Delete the existing unit and start typing to open the **Search** screen to select a new location.

Book an operation

When you book an appointment in a slot of type 'Operation', Bp VIP.net will automatically open the appropriate screen to record procedure details. To edit the details of a booked operation, select the occupied slot in the appointment book and press Ctrl+D.

How does the operation length affect the appointment book?

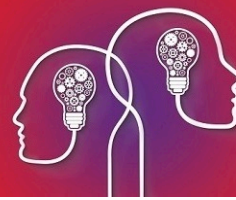
You can set the minimum recommended time for an operation in the procedure's chargeable item definition. When you book the operation, Bp VIP.net will automatically take up as many free consecutive appointment book slots as necessary according to the recommended time.

Book an operation

1. Book an appointment in a slot of type 'Operation' by any method.

If the patient has an incomplete operation already created, the **Choose/Create Operation** screen will appear. Click **New**.

If the patient has never had an operation recorded, or all prior operations are complete, the **Choose Procedure** screen is displayed.



2. Enter '/' in the **Search** field and the search term to search by description, or start typing the code for the procedure. Click **Run Search** to filter the displayed results.
3. If you need to search by **ICD-10** procedure codes instead, select the button at the bottom of the screen and perform the search.
4. Select the correct procedure from the list and click **OK**. The procedure will be loaded into the **Operation Details** screen.

10: ERROLL, Frank(AboperId: 1014)

Operation Details

Please verify the Location of each Procedure and Prostheses item

Code	Description	Location	Qty	Protocol
*38215	Selective coronary angiography.	NA	1	

Location? NA Right Left Bilateral Quantity Main Procedure

Unit: Surgeon:
Anaesthetist: Anaesthetic:
Assisting Prov.: Assisting Prov. 2:
Scrub Nurse: Scout Nurse:
Time Required: Mins. Print Order: Admission Date: Time: (e.g. 23:20)
Booking Notes: Summary Notes:

Prostheses

Code	Description	Location	Quantity
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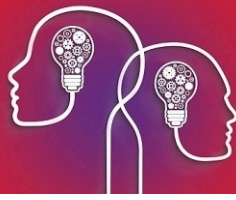
Location? NA Right Left Bilateral Quantity

Day Hospital:

Include Prostheses

5. Add and remove procedures using the buttons to the right.
6. If applicable, select the **Location** for the procedure, for example, a right eye or arm.
7. Complete the personnel and booking fields. Not all fields will be required for all procedures, but you must at least nominate the **Surgeon** and the **Anaesthetic** (and the **Anaesthetist** if **Anaesthetic** is set to anything other than 'None').

Note: These fields may also already be defaulted based on the surgeon's roster definition.



8. The **Admission Time** is set by default to the appointment start time, but you may need to change the admission time if the procedure requires the patient to arrive earlier.
9. Click **Add Prostheses** if the procedure involves one or more prostheses. Select the **Location** for each prosthesis.
10. The **Quote Doctor** button creates a quote for the procedure costs. Tick **Include Prostheses** to include the cost of prostheses in the quote.
11. Click **OK** to save the booking.

If the appointment cannot be fulfilled, you can move the appointment to the Waiting List.

If you are creating an invoice for the operation, you can link the invoice to the operation you just defined, so that Bp VIP.net can report on financials associated with an operation.

Working in the Waiting List

The Waiting List is a queue for organising patients who can be rescheduled if appointments are cancelled. The Waiting List can also be used by clinicians to nominate patients who require surgery, but leave the details of appointment booking to front desk staff.

How do I open the Waiting List?

Each appointment book page owner has a separate waiting list, found within the Monthly Planner (press Ctrl+M from the appointment book).

***Tip:** You can also add a patient to a waiting list without specifying a provider. The patient will appear on all page-owners' waiting lists. You can use this where a patient needs to see a doctor urgently and do not care which doctor.*

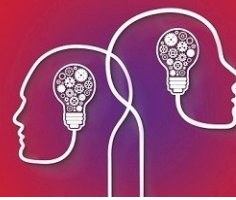
The Waiting List is different to the Waiting Room, which is used to arrive and stage patients through your consultation and payment process.

Do I need all of a patient's details?

When adding an item to the Waiting List, you can choose to add as much or as little information about the future booking as required. For example, front desk staff may not have the immediate time to enter all the details, so might create a Waiting List entry with just the patient's name to be completed later, or when more information has been obtained from the doctor. Bp VIP.net will prompt you if you want to add a Waiting List entry with incomplete information.

Wait a patient from the Appointment Book

1. Right-click on the patient's name in the appointment book. Go to **Booking** and select one of the two options:
 - **Add to Waiting List** — Creates an entry in the Waiting List but keeps the original booking in the appointment book.



- **Move to Waiting List** — Creates an entry in the Waiting List and deletes the original booking. All booking details are stored in the entry in the Waiting List and will be transferred to the new appointment when the patient is rescheduled.
2. If you selected **Move to Waiting List**, Bp VIP.net will prompt to confirm that you want the original booking deleted. Click **Yes**. The patient's appointment history will show the appointment as 'Rescheduled'.
3. The **Edit/Add Waiting List Item** screen appears.

Edit/Add Waiting List Item

Date on Waiting List: 14/11/2016 9:27:36 AM

Appointment Category: Operation

Appointment Type: Operations

Page Owner: Ophthalmology, Dr Dunkin

Points: 500

View/Edit Operation: R - 42863 Eyelid, recession of (Anaes.) (Assist.)

Remove Operation

Notes/Comments

Created by: Last modified by:

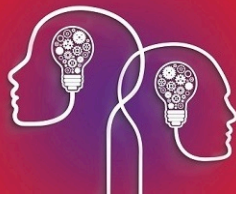
OK Cancel

4. Change the **Appointment Category**, **Appointment Type**, and **Page Owner** from the default if necessary.
5. Enter a **Points** value if your practice uses points to prioritise the waiting list.
6. For operation-type appointments, any operation details in the original appointment will be carried over to the waiting list. Otherwise, click **Choose/Add Operation** and select the operation the patient is waiting on.
7. Add any additional notes.
8. Click **OK** to add the patient to the Waiting List. Press Ctrl+M to open the monthly planner and view the waiting list.

Wait a patient from Medical Desktop

1. From Medical Desktop, click **Operations** or press Ctrl+F9 to open the **Operations** screen.
2. If you do not need to change operation details, select the unplanned operation that the patient requires and click **Add to Waiting List**.

If you need to edit operation details, modify the selected operation and click **Go to Waiting List**.



The **Edit/Add Waiting List Item** screen appears.

3. Click **OK** to add the patient to the waiting room. Administration staff will schedule the operation.

Wait a patient from Monthly Planner

1. From the appointment book, press Ctrl+M to open the monthly planner. The Waiting List is the list on the right hand side.
2. Use the **Add**, **Edit**, **Delete**, and **Filters** buttons at the top of the list to add and edit Waiting List entries. Click **Add** to search for a patient. Click **Filters** to change which appointment types and priorities are shown.

Create new appointment from Waiting List

1. Open the Monthly Planner (Ctrl+M) from the appointment book.
2. Find an available appointment slot you want to use that is of sufficient length for the appointment or operation type.
3. Click the patient in the Waiting List you want to book and drag the patient's name from the Waiting List to the slot on the monthly planner.
4. Bp VIP.net will display a warning if the booking criteria from the Waiting List does not match the available appointment. Click **Yes** to continue.