The Appointment Book

Booking

There are two main ways to book an appointment:

1. **Click** F2 to search for the patient and activate the patient into the 'Snapshot' up the top of the screen by **clicking** F3 to display the 'Patient Details' screen.
2. **Select** the appointment slot and **click** 'Ctrl + Enter'.

    OR

1. **Select** the appointment slot. Start typing the patient's surname and **click** the 'Enter' button to activate the 'Search Results' screen.
2. **Select** the patient from the list and **click** the 'OK' button.

TIP: A patient who is not registered can be entered directly into the appointment book as a place holder. Type the patients first name and surname and enter a full stop at the end, e.g., James Baker.

Rescheduling

Copies the patient from the appointment book.

Cuts the patient from the appointment book but remembers the patient.

Pastes the 'remembered' patient into the new slot.

Deletes the patient from the appointment book. Does not remember the patient.

When you 'cut' a patient from an appointment slot, they are remembered temporarily enabling you to 'paste' them into another slot. The patient's original appointment will automatically be deleted, and the old slot will display with the time in inverted black.

1. **If you forget** the patient you have 'cut' while doing another task, **click** the Deleted? Box to display the patient.

Appointment Slot

How do you open Appointment Book slots for early or late appointments?

1. **Click** 'Ctrl+o' to open your Appointment Book to 24 hr view.

    A full 24 hr day will display.
2. **Open** the 'Unav' slot by changing the 'Booking Type'.
3. **Click** 'Ctrl+o' to close the 24 hr view.

TIP: If you can't remember the shortcut keys, right mouse **click** on the appointment slot to see the menu of tools.

How do you extend an appointment to take over the next slot?

1. **Select** the appointment slot in the appointment book and **click** 'Shift + '=/+'.
2. **Click** '-' to reduce to the original time.

NOTE: You can not extend an appointment if a patient is booked into the next slot.

How do you double book an appointment?

1. **If** a provider has been set up to allow double booking of a slot, select the slot and **click** 'Insert'.
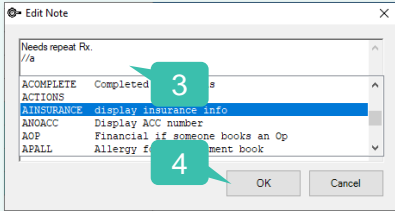
The Appointment Book

Bp Learning

Notes Columns

The **Notes** column in the Appointment Book is a great way to see additional information about the booked patient.

See the Ruby Knowledgebase: Set up / Appointment Book / Set up the appointment book, for instructions about appointment book autotexts.

To enter a note:

1. **Click** in the empty notes column and start typing.
2. **Double click** in the note to edit an existing note.
3. **Edit** the note or **enter** // to add an autotext.
4. **Click** 'OK'.

i. If an autotext has been set up to display on booking a patient, the note will display in < >.
ii. If the autotext has been set to refresh automatically, then the information displayed in < > will update if the field is updated on the patient record.
iii. When editing a note with an autotext, add notes outside the autotext < >.

Audit Log

The Audit Log enables you to see all user actions on an appointment slot. To display the Audit Log:

1. **Select** the booked appointment and **click** 'Ctrl + U'. The Audit Log screen is displayed.
2. **Enter** a historical date in the 'Dated between' field and **click** the 'Tab' key.
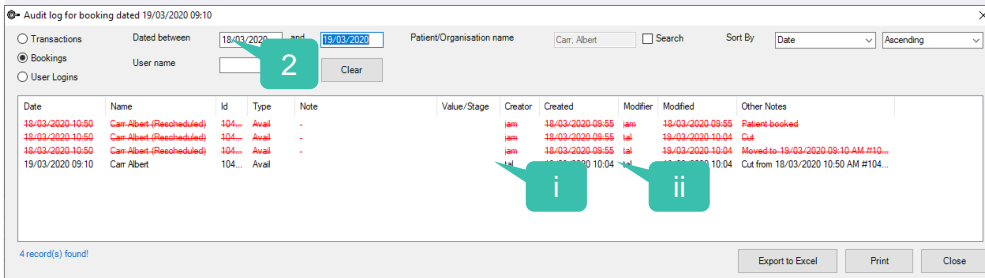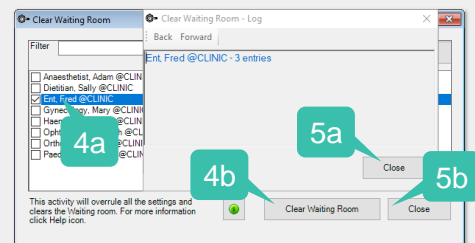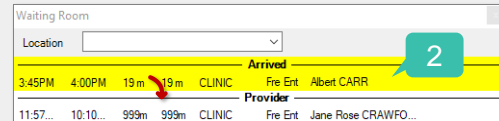

i. Creator: User who created the appointment.
ii. Modifier: User who last modified the appointment.

Waiting Room

The Waiting Room can be used to quickly see what stage your patients are in.

1. **Click** the 🕐 button at the top of the 'Appointment Book'.
   The 'Waiting Room' displays all your current staged patients.
2. **Optionally**, click, select and drag patients around the different stages to update the stage of the patient in the 'Appointment Book'.

Patients who continue to display in the 'Waiting Room' despite their appointment being ended, can be cleared from the 'Waiting Room'.

3. **Click** 'File > Utilities > Clear Waiting Room'.
4. **Select** the provider and click 'Clear Waiting Room'.
5. **Click** 'Close' on the 'Clear Waiting Room Log' and on the 'Clear Waiting Room' screen.

The patient is removed from the 'Waiting Room' and a notification is added to the 'Notes' column for the affected appointment.

TIP: Perform the clear at the end of the day when all appointments have ended.

SMS

When you send a Bp SMS for an appointment, the message and replies can be viewed in the 'Appointment Book'.

1. **Select** the telephone symbol beside the patient appointment.
2. **Right** mouse click and select 'View Conversation'.
3. **You can also '**Send/Re-send Reminders', 'Reply' or change the status of the SMS.

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