Appointment Book Features
Blue Chip – Appointment Book Features - Overview

This handout covers the following features of Blue Chip’s Appointment Book:

- Appointment Book Setup
- Making Recurring Appointments
- Using Find Slot
- Using Bulk SMS

Appointment Book Setup

Overview

The Appointment Book is a big part of your Practice’s everyday workflow, and that is why it is imperative to setup appointments to your Practice’s requirements. The setup determines a week’s plan which is defined by:

- The days on which the Practitioner is available
- The times in each day the Practitioner is available
- The location the Practitioner will be available within the morning session and afternoon session of each day
- The length of time a Practitioner is available for particular appointment types (e.g. New – 40 min, Review – 20 min)

Practitioner Screen Setup

1. Select Setup > Practitioner > Practitioner Details, highlight the appropriate Practitioner, and then select the Appointment tab. This tab is used for customising appointments per practitioner.

![Practitioner Screen Setup](image)

2. Within the Appointment Slot Time field, record the shortest appointment duration the Practice has within its Appointment Book.

3. Enter the number of Default Level of Appointment Priorities required. This determines the number of priority levels that can be chosen from the drop down list when scheduling an appointment.

4. Tick the Do not send SMS option, if SMS is not required to be associated with the Appointment Book as an entirety. Note that a SMS opt-out option per Appointment Type is available.

5. There are 12 Appointment Types fields available to customise. Add or edit Type Description, Abbreviation for the type and determining the Usual Length of the appointment.
Plan Configurations screen Setup

1. Within the same Practitioners setup screen, click the Plan button. The Plan Configuration window appears. From this window, you customise the Practitioner’s availability for appointments.

![Plan Configuration window]

2. Enter the Plan Start Date, and indicate the number of Weeks per Cycle. A plan in its basic form is a series of weeks in a cycle (e.g. a four-week cycle). Where a practitioner has multiple plans, each plan follows the previous in a sequence (e.g. a four-week plan, followed by a two-week plan, and so on).

3. Within the body of this window enter Start and Finish times for each day. Enter an Offset time for each day if desired. The offset time refers to the first time period displayed in the Appointment Book. Without defining an Offset time, the default time becomes 9:00am.
   - Copy the settings for Monday to Friday, by clicking the Copy Mon-Fri button.
   - Clear a weekend by clicking the Clear Weekend button.
   - Copy from the previous week by clicking on the Copy from Previous Week button.

4. Enter the morning and afternoon sessions, by entering a location in the AM and PM Location fields.

5. If a Practice has certain time slots allocated to each appointment type, enter each commencing time separated by ‘comma space’ e.g. 9:00am, 10:00am, 11:00am. This must be repeated for each day of the week in the cycle. If the same time slots are required, the copy and paste functionality is recommended.

   Each type of appointment (per practitioner) can be represented by a different colour, displayed in the Appointment Book. For example, you could indicate that New appointments will be displayed in blue in a 9am, 10am, 11am, etc. time slot, whereas Review appointments will be red in a 9:20am, 10:20pm, 11:20pm, etc. time slot.
How the preceding setup displays in the Appointment Book.

6. Click **OK** to confirm settings for the current week. If a ‘Week 2’ is required, click back into the **Plans** button and repeat the above steps. Each new week is entered and confirmed separately.

7. Repeat the above steps for each Practitioner.

**Example of a Two-Week Cycle**

Days and times are recorded for Week 1.

Then, using the up/down ‘week’ arrows (at top-left of the image above) select ‘2’ to display the schedule for week 2. Record the schedule for Week 2, as desired.

This is all that is required to record a two-week cycle.

In such a scenario, after two weeks, Week 1 is used again, followed by Week 2, and so on, indefinitely.
Recurring Appointments

Overview

Schedule recurring appointments via the patient’s record ‘Bookings’ menu, or via the Practice Explorer > Appointment Book; the procedure is virtually identical, except for the possibility of pre-populated fields, depending on the work area accessed;

- Via Bookings: click the New button and select the appropriate Practitioner from the drop down list. The Patient’s name is automatically populated.
- Via the Appointment Book: select the Practitioner, Date and Time slot of the first appointment prior to adding the appointment. This information is automatically populated in the new appointment screen. Selecting the appropriate Patient is required from this work area.

Regardless of which method you use, the appointment will be available in both Bookings and the Appointment Book (always cross referencing).

Procedure

1. For this example the appointment is made through the Appointment Book. Access Practice Explorer > Appointment Book from the margin menu. This will automatically display today’s appointments for each Practitioner. From the calendar tool, select the required date. All appointments recorded for that day are displayed.

2. Click in the time slot for the appropriate Practitioner to select the appointment time.

3. Double-click the slot to display the New Appointment Wizard, or right click and select Add Appointment.

4. Enter the Patient’s surname into the Patient field.

5. Select the Type of appointment from the dropdown list.
6. The **Referring Doctor** field automatically populates the Patient’s most current referral (if attached to the Patient’s record) and referring doctor. If required, a new referral can be added via this screen by clicking the drop-down arrow and then clicking the **Add** button.

7. Tick the **Make multiple recurring appointments** check box.

8. Click the **Next** button. A free **Comment** field is provided to record any relevant information regarding the patient’s appointment.

9. Click the **Next** button to display the **Create Recurring Appointments** screen.

10. The **Date of first appointment** will automatically populate from the selection made via the Appointment Book. This can be altered if required.

11. Enter the **Number of appointments** the patient requires.

12. Enter the **Time between bookings**; enter a number to represent a frequency of duration, and then select a period via the drop-down list provided e.g. “3 Months”.

13. Depending on the period you selected at Step 12 the **Best day/date in period** field changes accordingly. If you selected ‘Month’, you can use this field to specify an actual day date e.g. “6th”.

14. Specify a **Best time** for the appointment; either manually or via the associated clock button.

15. Select whether or not to **Allow double bookings** by enabling/disabling the associated check box, and then indicate how many double-ups are permitted.

16. Click the **Next** button to display the **Revise Recurring Appointments** screen.

17. Take a moment to confirm the appointment schedule is suitable. Amendments can be made from this screen by clicking into the required cell and manually making the change. A **Print list** option is also available.

   **Note:** A **Next** button will be made available to this window if Blue Chip determines any warnings are required about the appointments just recorded. Click the Next button to reveal the **Review Appointment Warnings** screen.

18. Click the **Finish** button when you are ready to record the range of multiple appointments. The new appointments are also entered in the Appointment Book.
Using ‘Find Slot’

Overview

The Find Slot feature provides a more efficient way to search for the next available appointment for a specific appointment type (preference). This feature will only work if the Practice has entered predetermined appointment times within the plan setup. The Find Slot button is available from the Appointment Books, and within the ‘edit appointment wizard’ screen.

For example, a practitioner may wish to see new patients on the hour, follow-ups in the remaining time of that hour, and post-ops after lunch. Click the Find Slot button in the edit appointment wizard screen to open the Find Free Appointment Slot screen.

Procedure

1. Either from the Appointment Book or an edit appointment wizard screen, click the Find Slot button. The Find Free Appointment Slot window appears.

2. Depending on how you accessed this window, it may be pre-populated with data – you may need to select Practitioner and/or Preference (appointment type) if they are not already selected for you. The start date will default to the current appointment date or today’s date. Modify this if desired.

3. Click the Search button to commence the search. The search may take a moment. After the search has completed, the first twelve free slots will display in the Search Results section. If these slots are unsuitable, click the Next button to display the next twelve free slots.

4. Select your desired appointment slot by either clicking the dates and times on the left panel and then the OK button, or by selecting an available time slot in the right hand panel and then clicking the OK button. You will be returned to the new or edit appointment wizard screen.
Sending Bulk SMS Reminders

Overview

The SMS Reminders feature can send SMS messages from Blue Chip to a mobile phone. The message transfer is managed by a third party with whom you must register in order to send SMS messages.

There are two components to upgrading your SMS registration:

- Initialising the new SMS registration from within Blue Chip
- Configuring your proxy in order to send scheduled SMS messages

Single (SMS Selected Patient) or Bulk SMS (Bulk) message functionality is available.

![Appointment Book Features](image)

Procedure

1. Both Single and Bulk SMS options are accessed from the SMS button, located in the top-right of the Appointment Book. For this example a Bulk SMS will be processed. Click the SMS button, and then select Bulk.

2. The Bulk SMS Wizard displays, advising you that it will guide you through the steps to send the bulk SMS. Click the Next button.

3. Step 1 of the Bulk SMS Wizard appears. Select the customised Message Template from the drop down list, or create a new SMS Message for the patient in the free text area. Click the Next button.
4. **Step 2** of the Bulk SMS Wizard appears. Select a **date/time range**, **Practitioners** and/or **Group**. This will only include the appointments that meet the criteria that have been selected. Click the **Next** button.

![Step 2 of Bulk SMS Wizard](image)

5. **Step 3** of the Bulk SMS Wizard displays. Select the **Appointment Type(s)** required for each practitioner. There must be at least one type selected for each practitioner. Click the **Next** button.

![Step 3 of Bulk SMS Wizard](image)

6. **Step 4** of the Bulk SMS Wizard appears. This provides the list of patients that will receive the bulk SMS. Tick **Show Excluded Patients** to view the patients that are excluded from the list on the basis that they have either opted out of receiving SMS messages or have no mobile phone number recorded.

![Step 4 of Bulk SMS Wizard](image)
7. Step 5 of the Bulk SMS Wizard appears. An **SMS Credit Check** must be completed to determine if there enough credit to send SMS messages to all of the selected patients. Click the **SMS Credit Check** button to perform this check. Once the credit check results come back as successful, click the **Finish** button. SMS messages have now been sent to the patients.