



MedicalDirector®
BLUECHIP

Theatre Bookings in MedicalDirector Blue Chip

MedicalDirector Blue Chip – Theatre Bookings

This handout provides the following procedures:

- Appointment Book Setup to cater for Theatre Bookings
- Make a Theatre Booking
- Change the order of Theatre Bookings
- Print Theatre List
- Using Find Slot

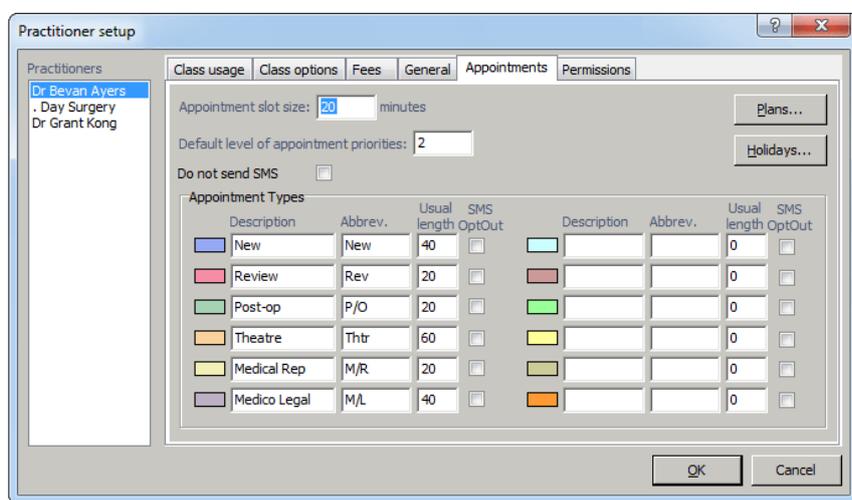
Appointment Book Setup for Theatre Bookings

Overview

The Appointment Book is a big part of your everyday workflow, and that is why it is imperative to setup appointments to your Practice's requirements. The setup determines a week's plan and making the appointments quick and easy to create, edit, move, find appointment slots and for tracking purposes for each Practitioner. So, if a Practitioner's week includes Theatre then use the appointment book to your advantage. Set Theatre bookings as a preference within the Appointment Book setup.

Practitioner Appointment Book Setup for Theatre

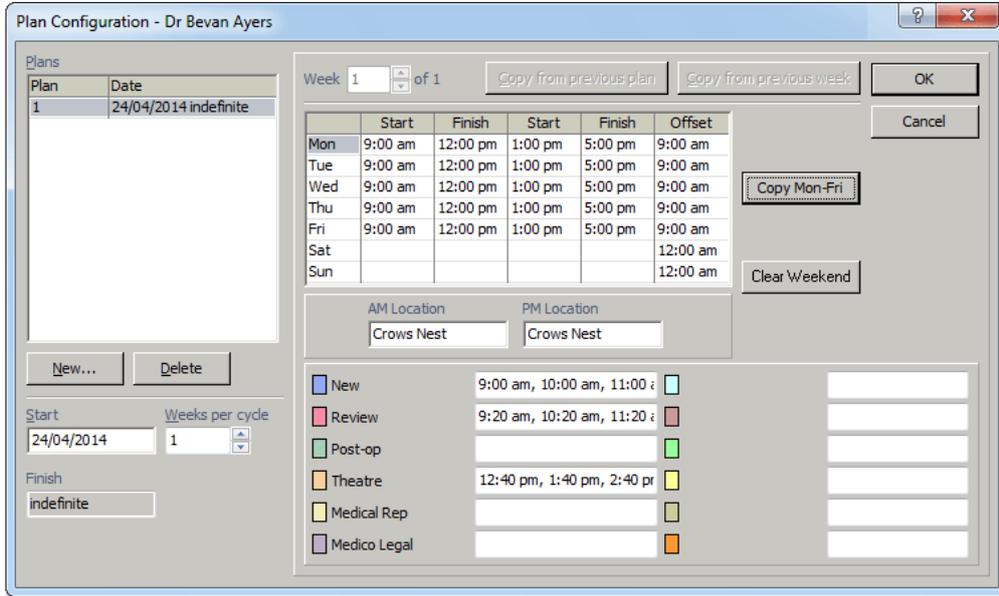
1. Within MedicalDirector Blue Chip, select **Setup > Practitioner > Practitioner Details**, highlight the appropriate **Practitioner**, and then select the **Appointments** tab. The Appointments tab is for customising the selected practitioner's appointments.



2. To track a practitioner's theatre bookings, you must add 'Theatre' to the practitioner's list of Appointment Types. Select an available Appointment Type slot, and enter **Theatre** in the **Description** the **Abbrev** fields.
3. Indicate the length of time allocated for theatre appointments in the **Usual Length** field and then click **OK** to confirm the changes.
4. Go back into **Setup > Practitioner > Practitioner Details**, highlight the same **Practitioner**, and then click on the **Appointment** tab to continue working with setup.

Plan Configurations screen Setup

1. Within the same **Practitioners Setup** window, click the **Plans** button. The Plan Configuration window appears. This is where you define the availability of the selected Practitioner for the week, or a cycle of weeks. The Practitioner’s plan may already be established. However, you may wish to alter the current plan, or create a new plan to cater for the **Theatre** appointment type.

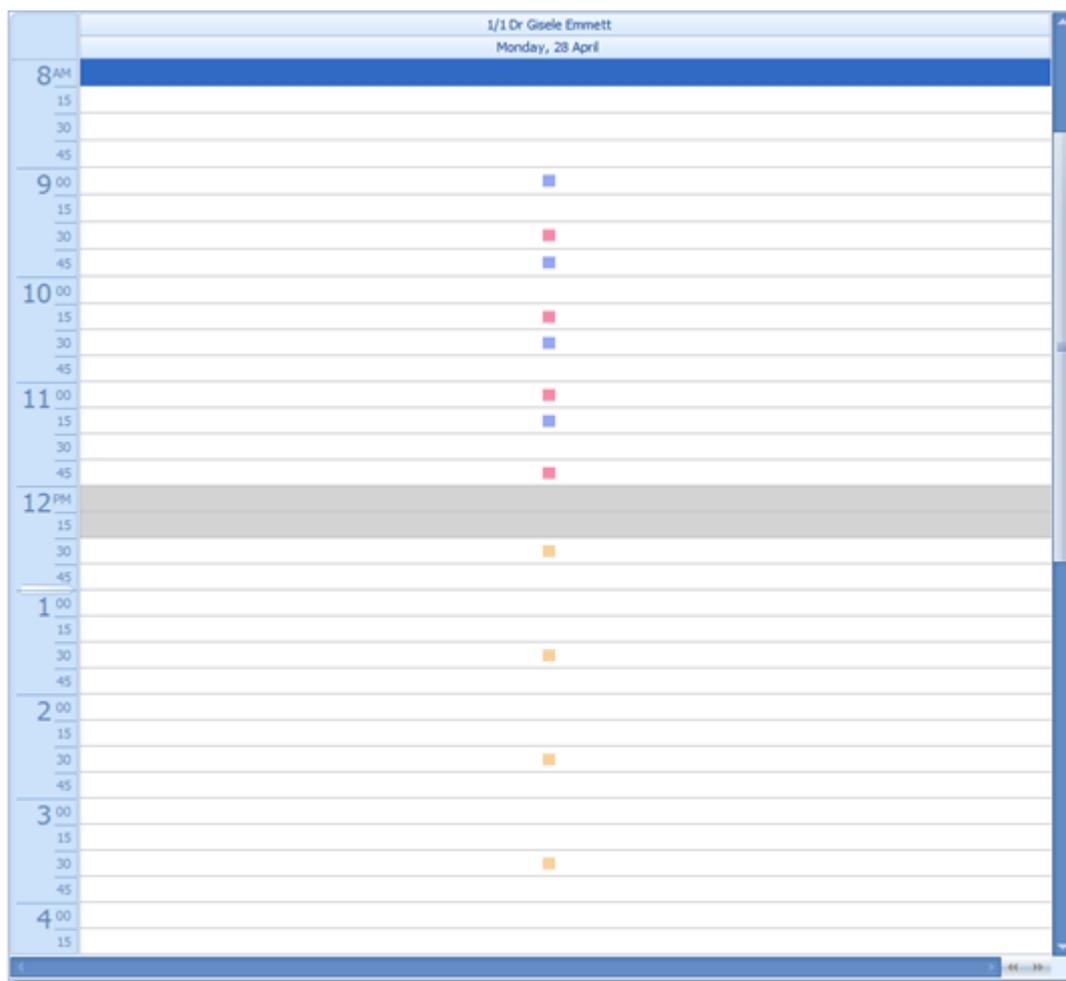


2. Alter an existing plan, or create a new one now if required. If you require further assistance with creating plans, press **F1** to open the MedicalDirector Blue Chip Help, and search for **Plan Configuration**, or contact MedicalDirector Customer Care.
3. Enter the **time slots** required for the new Theatre 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, 9:45am, 10:30am, etc. time slot, whereas **Theatre** appointments will be in **orange** in a 12:30pm, 1:30pm, 2:30pm, etc. time slot.



How this plan appears in the Appointment Book.



4. Click **OK** to confirm settings for the current week. If a second week is required, click the **Plans** button again, and repeat the above steps. Each new week is entered and confirmed separately.
5. Repeat the above steps for each practitioner.

Making a Theatre Booking

Overview

Making a theatre booking follows the same procedure as all other appointment types. This can be done via the **Patient's Record > Bookings** margin menu item, or via the **Practice Explorer > Appointment Book** margin menu. The difference between these two methods is in how the appointment fields are pre-populated;

- When coming via **Bookings**, click the **New** button and select the appropriate practitioner from the drop-down list. The patient's name is populated automatically.
- When coming via the **Appointment Book**, and selecting the **Practitioner, Date** and **Time** slot of the first appointment (prior to adding an appointment), these fields are populated automatically within the new appointment screen. You must then select the appropriate patient.

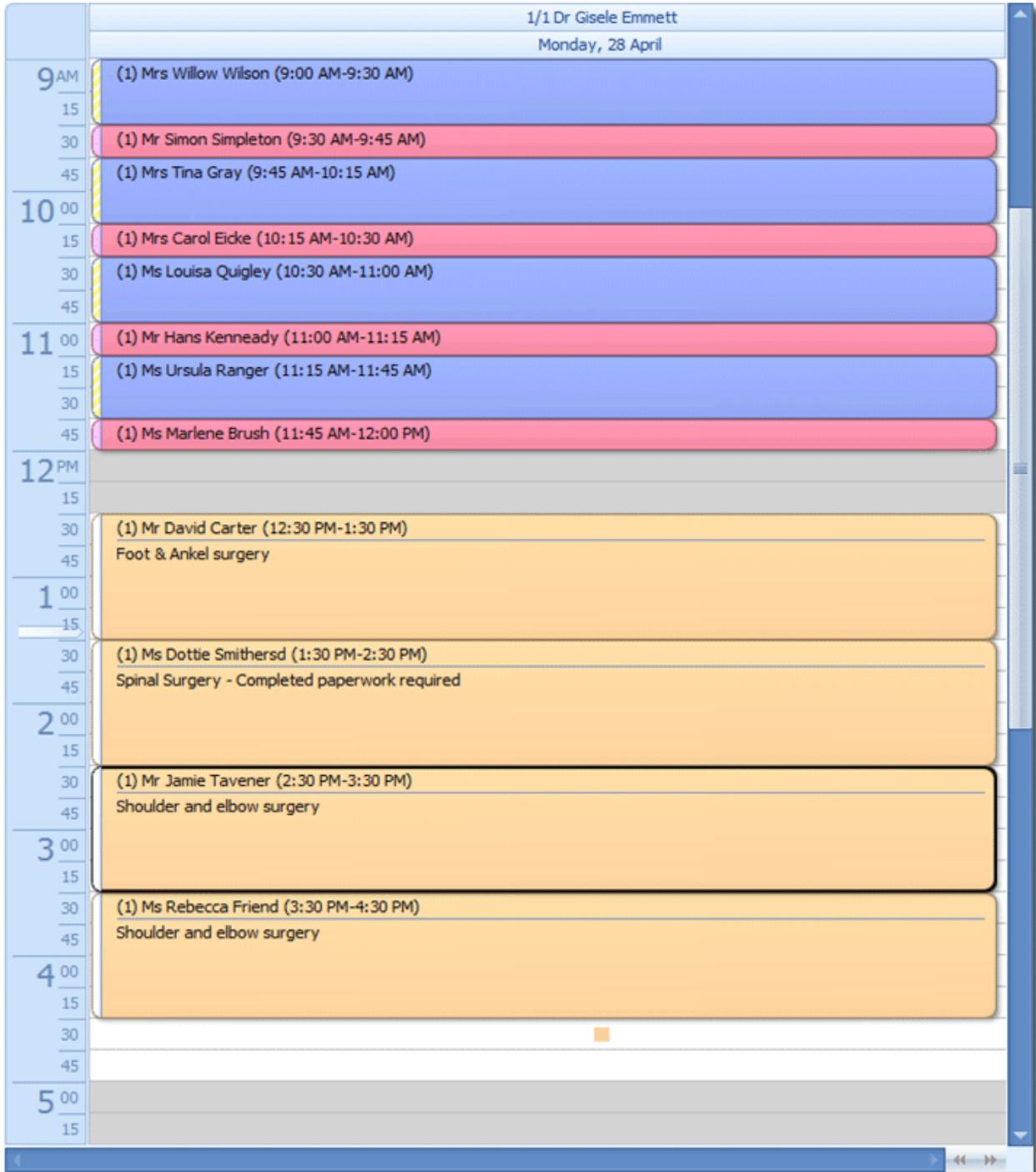
Regardless of how you create a new appointment, it will be available in both Bookings and the Appointment Book (always cross referencing).

Procedure

For this example, the appointment is made via the Appointment Book.

1. Within the **Practice Explorer**, select the **Appointment Book** margin menu. This will automatically display today's appointments for each practitioner.
2. From the **Practitioner** drop-down list, select the appropriate **practitioner**, and then from the calendar tool select the required date. All appointments recorded and available for that day will be displayed.

Example: Dr. Gisele Emmett has 'New' and 'Review' patients in the morning with 1 New appointment, and Theatre all afternoon with 1 Theatre appointment available at 4:30pm.



- Click in the **time slot** to select the appointment time.
- Either double-click the slot, or right-click it and select **Add Appointment** from the menu that appears to display the **New Appointment Wizard**.

- Enter the patient's surname into the **Patient** field, click the  button search for and select the correct patient.
- The **Type** field defaults to 'Theatre' if the time slot selected was pre-configured as a Theatre time slot. If you discover that this slot was preconfigured as a *different* type, you can manually select 'Theatre' from the drop-down list instead.
- The **Duration** will also default to the pre-configured duration, and can be modified manually if desired.
- The **Referring Doctor** field automatically populates with the doctor associated with the patient's most recent, current referral (if attached to the patient's record). You can create a new referral via this window if desired, by clicking the drop-down arrow within the Referring Doctor field, and then clicking the **Add** button.
- Tick the **Make multiple recurring appointments** check box if required.
- Click the **Next** button. A **Comment** field is provided for recording ancillary information regarding the patient's theatre booking.

- Click the **Next** button. If there is a concern with the booking at this point a **Review Appointment Warnings** screen will display and advise.
- Click the **Finish** button to record the booking. The new booking is also entered in Bookings within the Patient file.

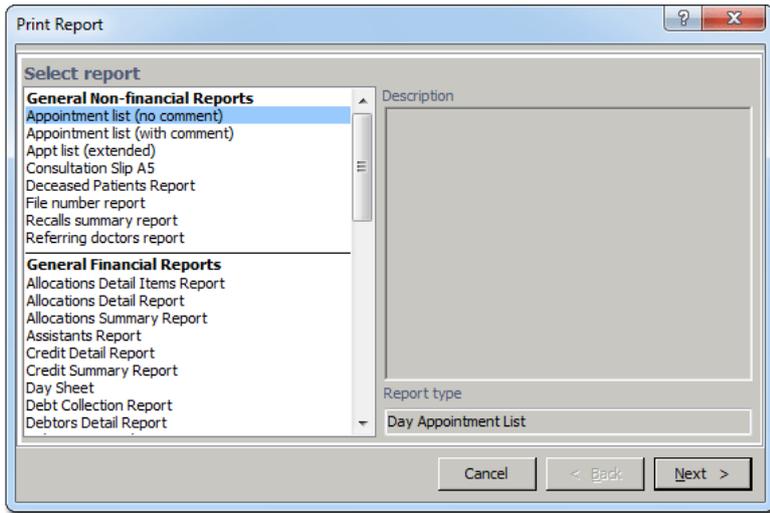
Print the Theatre List

Overview

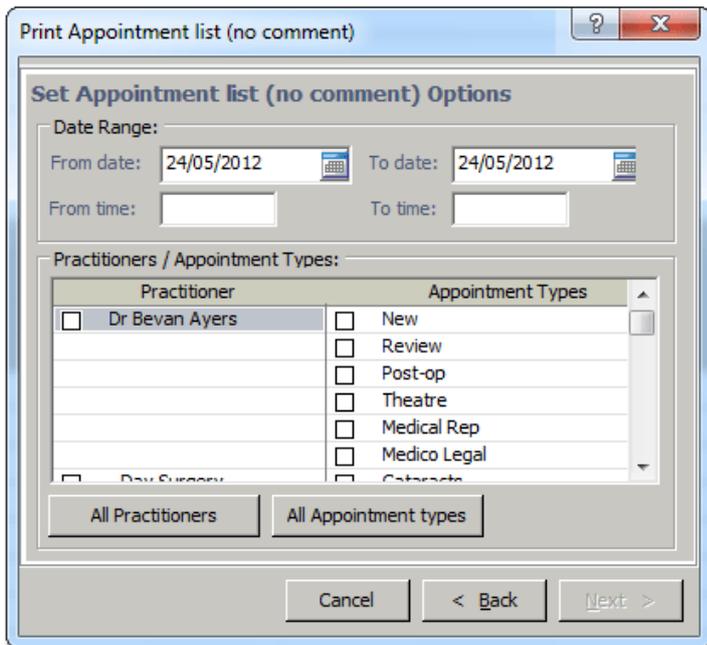
MedicalDirector Blue Chip provides a report that will generate a Theatre List from the Appointment Book with the appointment type (preference) Theatre. This can be generated per Practitioner with or without comments.

Procedure

1. Within MedicalDirector Blue Chip, select **Reports > Print**. The **Print Report** window appears.

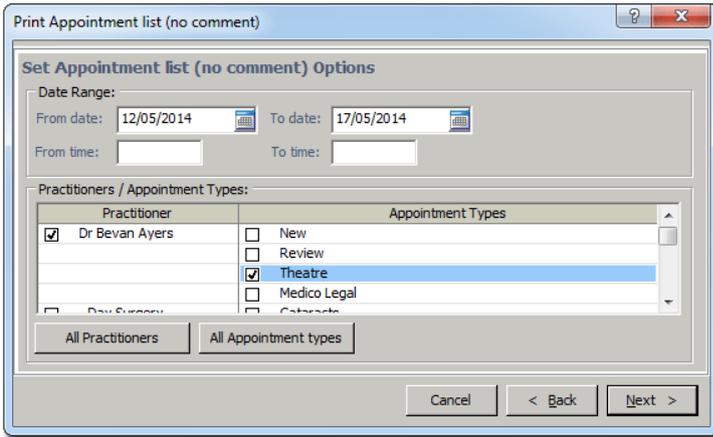


2. Locate the **General non-financial Reports** section, and then either the **Appointment List (no comment)** or **Appointment List (with comment)** report.
3. Click the **Next** button. The **Print Appointment List** window appears. In the following example, the 'no comment' version of the report was selected.



4. On the **Set Appointment List options** screen; select the appropriate **Practitioner**.

- Select the **Appointment Type** as **Theatre**, and then click on the **Next** button.



- This will display the **Set Print options**, select to **Printer** or **Screen**, and then click on the **Next** button.

APPOINTMENT LIST 28/04/2014						
HCN Blue Chip Version 2.9.3.1 HCN Demonstration System					Page: 1 of 1 Run: 28/04/2014	
Dr Gisele Emmett Monday 28/04/2014						
Time	Location	Duration	Type	Patient	Phone No.	File No.
12:30 pm		60	Theatre	Ms Dottie H Smithersd	9839 0183	5
12:30 pm		60	Theatre	Mr David F Carter	02 4536 7766 0405887900	106
2:30 pm		60	Theatre	Mr Jamie M Tavener	9467 6183 9906 6633	
3:30 pm		60	Theatre	Ms Rebecca Friend	02 4876 8390 0438766544	34
4:30 pm		60	Theatre	Ms Louisa Quigley	9999 8877	48

Using 'Find Slot'

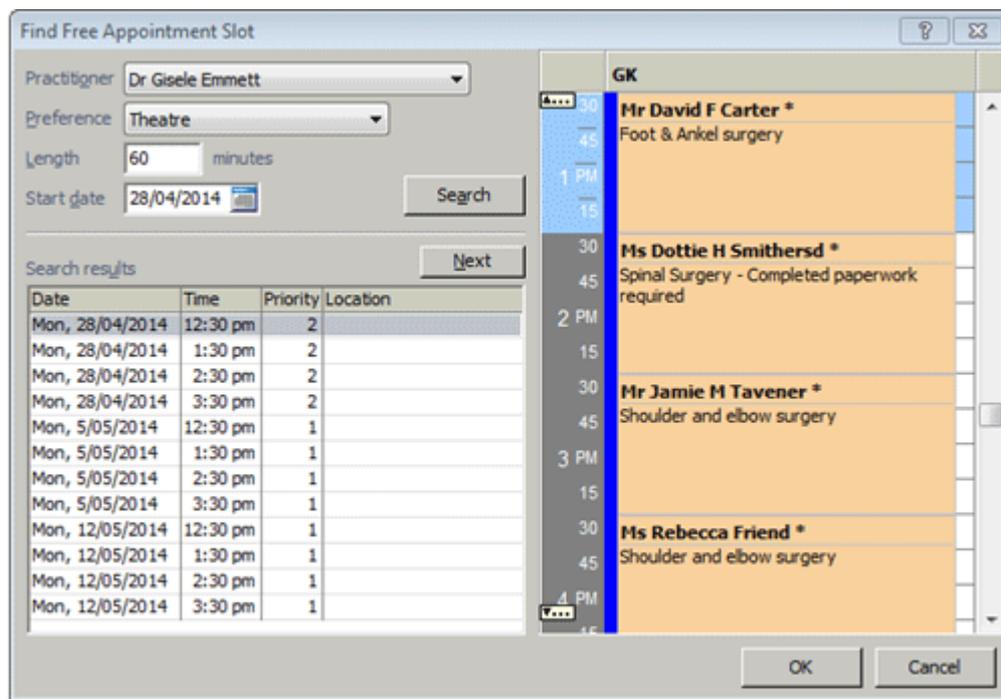
Overview

The **Find Slot** feature provides a more efficient way to search for the next available appointment for a specific appointment type (preference), providing you with a quick and easy way to find the next available theatre booking slot. This can be used for new bookings, or for rescheduling existing theatre bookings. 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 an edit appointment wizard screen.



Procedure

1. Either from the **Appointment Book** or an **edit appointment wizard** screen; click on the **Find Slot** button. This will display the **Free Appointment Slot** screen.



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 = 'Theatre' in this instance) 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.
5. Complete the **appointment wizard** as usual and click on the **Finish** button to record the new or edited Theatre Booking.

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