Bp Premier

First in GP Software

JADE

Bp Premier Appointment Book Guide

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Intended for usage with Bp Premier version Jade SP1 and later. Some features in this User Manual may be available only in versions later than Jade.

Understanding the Appointment Book workflow

The appointment book workflow in Bp Premier covers all of the events from booking an appointment to processing payment by the patient.

Every practice is different, but the appointment book workflow for front desk and providers will often look like:

1. An appointment is booked from the Appointment Book.
2. The patient is arrived and automatically added to the Waiting Room.
3. The provider starts the visit from Waiting Room and begins the consultation.
4. The provider finalises the visit in Patient Record and ends the consultation.
5. The patient's account (invoice) is created or finalised from the Appointment Book.
6. Payment from the patient is processed at reception (for private practice fees).
7. The appointment is closed.

Book or update an appointment

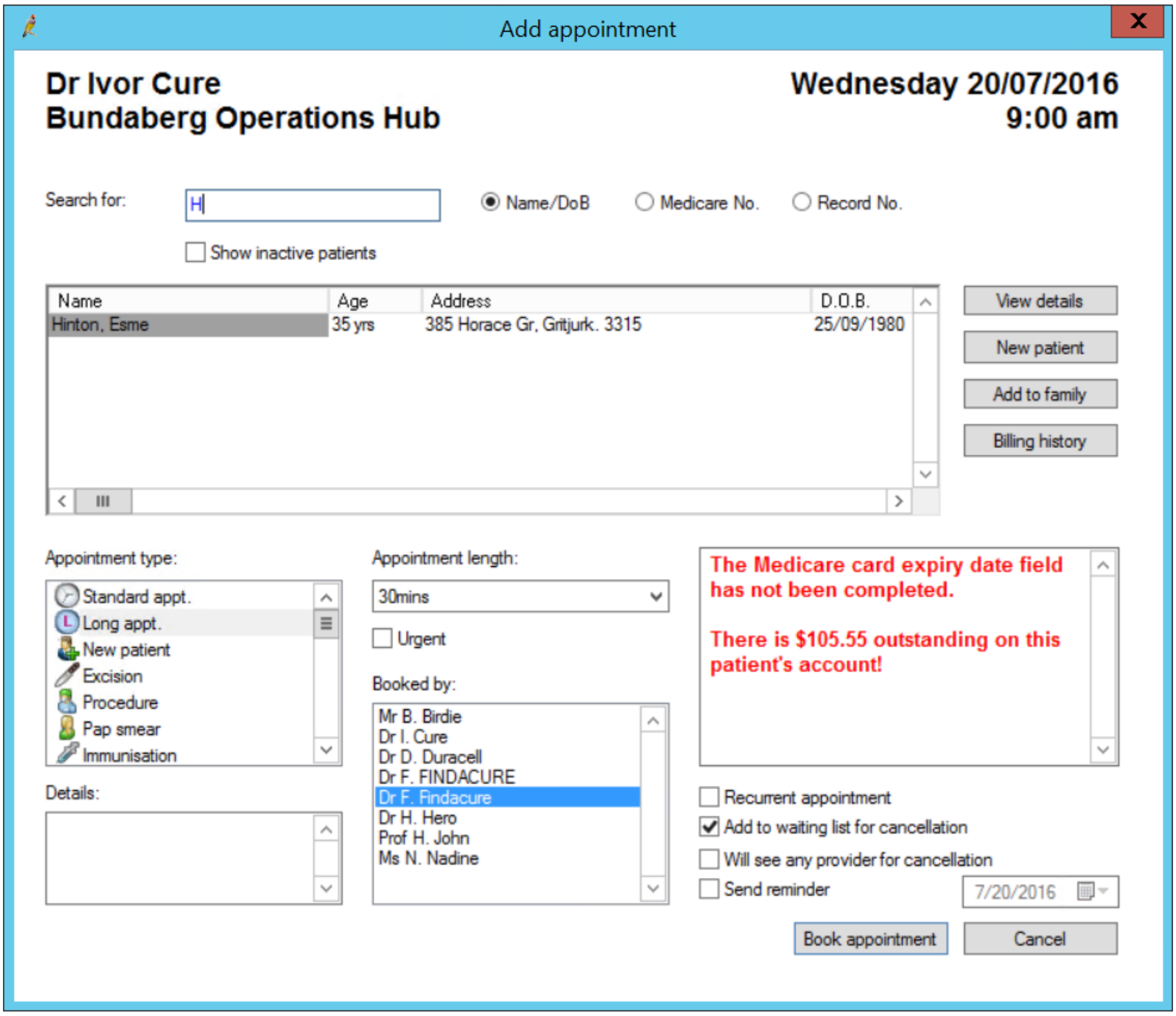
To open the appointment book from the main Bp Premier screen, select **View** > **Appointment book** or press **F12**.

Book a new appointment

There are many different ways to create a new appointment, depending on how your staff like to use Bp Premier.

1. Double-click any slot, or click the slot to book in the Appointment Book and choose one of:
    - start typing the patient surname
    - click the **Add new appointment** button in the left hand side of the screen
    - press **F3** on the keyboard
    - right-click the appointment and select **New appointment**
    - click the **Add new appointment** icon in the toolbar
    - select **File** > **New Appointment**.

An **Add appointment** window will appear, where you can book **patient** or **non-patient** appointments.



Book appointment for a patient

2. To book a new appointment for a patient, enter the first few letters of the patient's surname in the **Search for** field. A list of patients whose surname matches the letters entered will appear.
3. If the search list is too long, continue entering the patient's surname, add a comma, and enter the first few letters of the patient's first name.
4. You can search for the patient by **Medicare No.** or **Record No.** by changing the radio button.
5. When the desired patient has been found, select them from the list and specify:
   - the appointment type
   - appointment details (text field)
   - appointment length
   - who booked the appointment and if it is a recurring appointment.

6. If you wish to edit a patient's details before booking an appointment, select the **View details** button to open the **Patient details** screen.
7. If the appointment is urgent and the patient is available, select **Add to waiting list for cancellation** to add the patient to the Cancellation list.
8. If your practice uses Bp Premier's clinical reminders, select **Send Reminder** to also generate a reminder of type 'Appointment' against the patient.
9. Click on the **Book appointment** button to save the appointment to the appointment book.

Book appointment for a non-patient

2. To book a new non-patient appointment, leave the **Search for** field blank and select an appointment type. The appointment types that can be used for non-patient appointments are:
   - Meeting
   - Assist
   - Nursing Home visit
   - Teleconference
   - Drug rep
   - Other.
3. Enter the appointment information into the **Details** field. The details will appear in the appointment book.
4. Click on the **Book appointment** button to save the appointment to the appointment book.

TIP Custom appointment types can be created from **Setup** > **Configuration** > **Lists** > **Appointment types**.

Add a new patient quickly

If a patient does not exist in Bp Premier, you can quickly add them from the **Add appointment** screen.

1. Click the **New patient** button. The **New patient** screen will be displayed.
2. When opened from the appointment book, the only mandatory fields from this screen are the **Family Name** and **Given Name** fields, to allow you to book an appointment quickly. Complete these fields and click **Save** to return to the **Add appointment** screen.
3. When the patient attends the appointment, complete the rest of the information required in the **Patient details** screen.

Edit an appointment

1. To edit an appointment, choose one of:
   - right-click the appointment and select **Edit appointment**
   - select the appointment and click the **Edit appointment** button on the left hand side
   - select **File** > **Edit Appointment**.

The **Appointment details** screen will be displayed. You can edit all appointment details except for who the appointment is for. If you need to change the patient for an appointment, you must delete and rebook.

2. Click the **Save changes** button to return to the appointment book.

Can I see who edited an appointment?

To see who last updated an appointment, right-click the appointment slot and select **View text**, or press F10.

View a patient's appointment history

Select **Management** > **Appointment history** from the main screen. Search for a patient to open the **Appointment history** screen for that patient.

Tick **Include family members** to display the appointment history for all members of the patient's family.

Start and finalise a visit

After a patient has arrived at the practice and their appointment has been marked as 'arrived', the provider can start the visit from the appointment or waiting room.

To open the waiting room from the main Bp Premier screen, select **View** > **Waiting room** or press **Ctrl + F12**.

Preview patient notes

Previewing from the waiting room opens the patient's record, but does **not** start the consultation timer. No visit is created in the database and Today's notes is not available. The patient's name is not removed from the waiting room. This allows a provider to view a patient record without starting a visit.

Select a patient in the waiting room and click **Preview notes** to open the patient record in preview mode.

Start the visit

Providers may prefer to open records from the Waiting Room, which only displays information about patients who have arrived.

To start a visit from the **Appointment Book**, choose one of:

- double-click the appointment in the appointment book
- select the appointment and click the **Start Visit** button on the left hand side
- right-click an appointment and select **Start visit**.

To start a visit from the **Waiting Room**, choose one of:

- double-click on the appointment in the waiting room
- press the **F2** button on the keyboard
- select the patient record and click the **Start Visit** button at the top of the screen
- right-click an appointment and select **Start visit**.

The **Patient clinical record** will now open and the provider can begin the consultation.

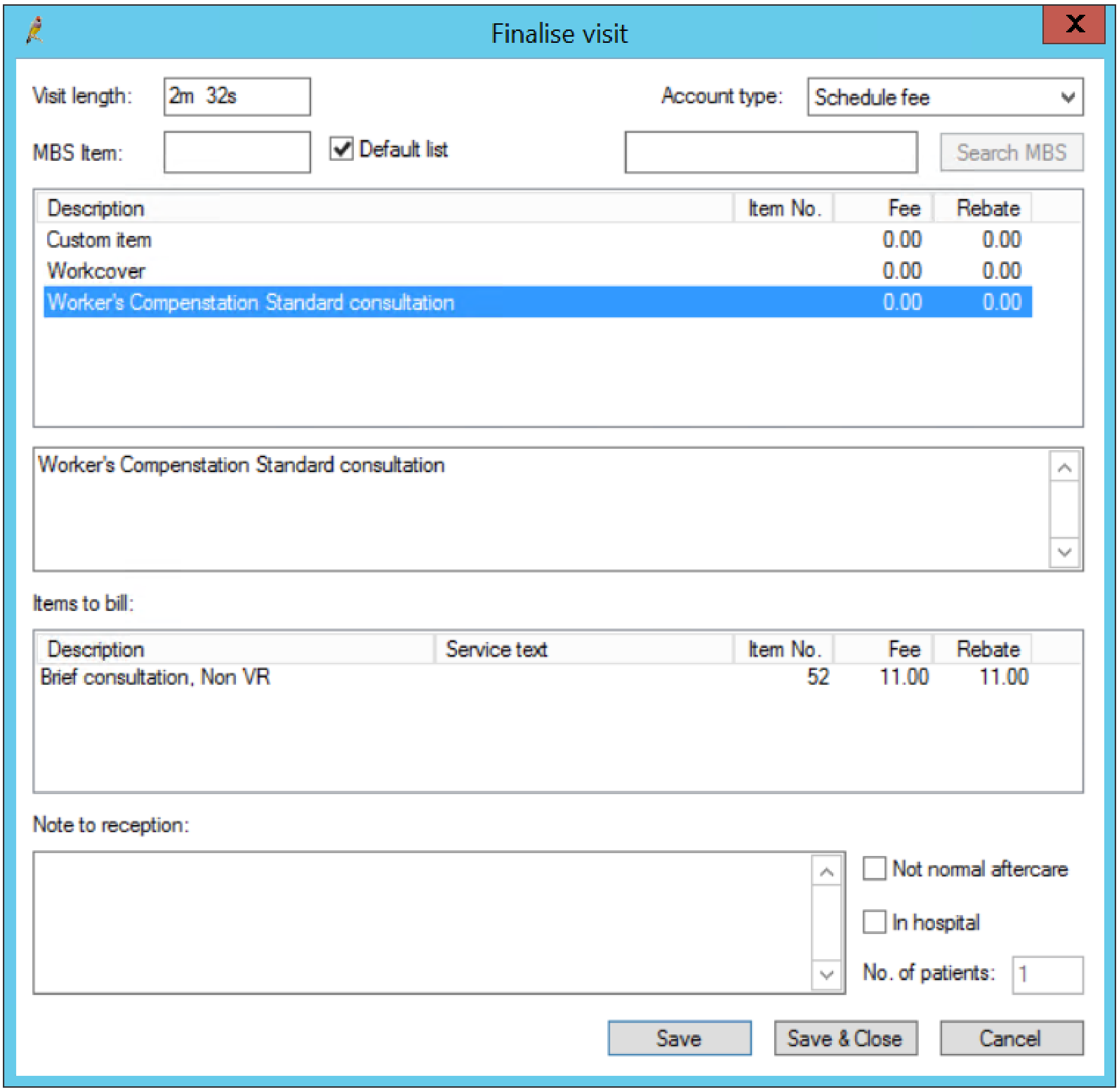
Finalise a visit

Finalising a consultation generates invoice items and other billing information, ready for front desk staff to process payment after the patient returns to reception.

1. When you have finished consulting with the patient, click the **Finalise visit** button from the patient record to display the **Finalise Visit** screen.

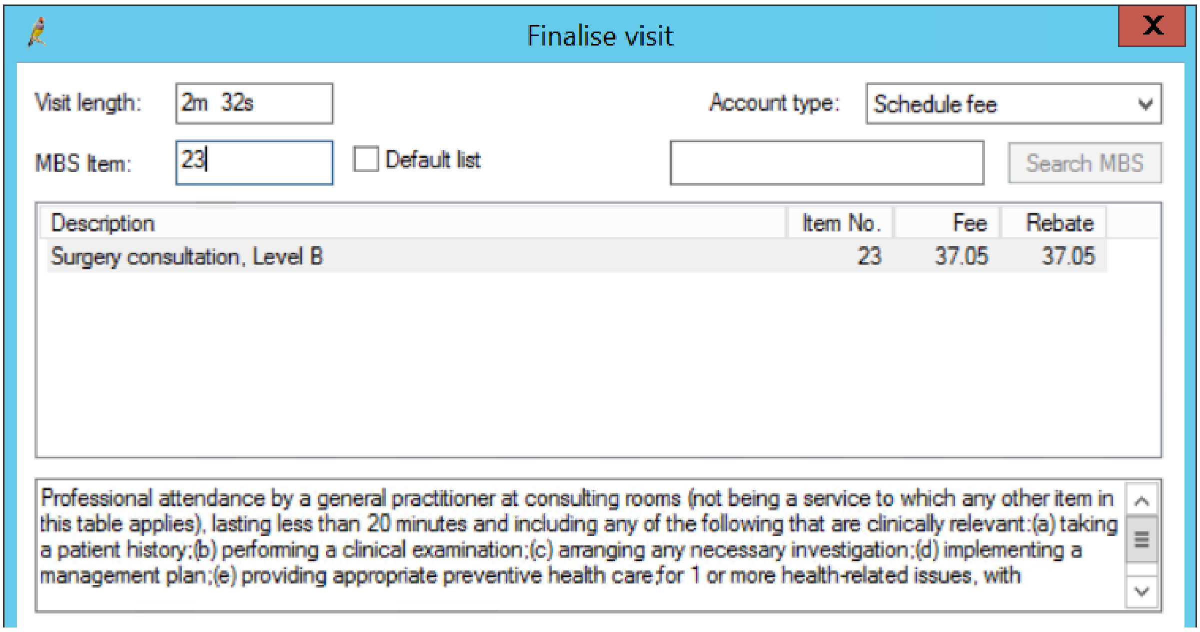
TIP If the patient record was opened from the appointment book or waiting room, the **Finalise visit** screen automatically opens when a patient record is closed after consultation, and you do not need to click **Finalise visit**.

If you click **Finalise visit**, Bp Premier will insert an entry into the appointment book for the current time and mark the appointment as 'At billing'.



2. The **Visit length** is calculated from the time that the patient record was opened.

3. The **Account type** defaults according to the billing configuration:
    - If **Setup** > **Configuration** > **Billing** > **Billing precedence** is set to ‘Patient’, the type defaults to the **Usual account** recorded in the patient’s demographic.
    - If **Billing precedence** is set to ‘Doctor’, the type defaults to the **Default account type** recorded in the provider’s **Edit user details**.
4. Type in the **MBS item** number. The description of the item will be displayed with the fee associated with the account type.



If the provider would like to always default the item number to a specific item (for example, 'item 23'):

1. Set the **Default Item No.** in **Setup** > **Users**.
2. Tick **Always use the default MBS Item in the Finalise window checkbox** in **Setup** > **Preferences** > **General**.
3. Set **Billing precedence** to 'Doctor' in **Setup** > **Configuration** > **Billing**.

The default item will appear regardless of the length of the visit. If there is no default item, the visit length will determine the default consultation item.

5. To add this item to the account, double-click on the description. The item will appear in the **Items to bill** section.
6. If the **Default list** checkbox is ticked, the list shows the customised fee items for the practice. These could be either MBS items that have had their default fee customised, or non-MBS items that the practice manager has created for items that the practice regularly charges for. The non-MBS items are listed first in alphabetic order, followed by the MBS items.
7. If you can't remember the MBS item number, use the **Search MBS** fields to search for items:

- Type directly into the search box to filter the list of items
- Type into the search box and press **Search MBS** to search for MBS items containing the search text in the description.

TIP Medicare rules mean that it is not possible for two consultation items to be added to the one account . The **Finalise visit** screen will delete any existing consultation item number if you add a new consultation item.

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8. To add additional items, repeat steps 4–7.
9. **Items to bill** displays items that have been selected by the user or added automatically. Items in this list have the following right-click menu options:
   - To remove an item from the list, right-click on the item and select **Delete**.
   - If the item is a Care plan, Excision, or other item that needs further description, right-click and select **Add Text**. Keep the text to a minimum and refer to your practice manager for recommendations of the abbreviations to use.
   - If the **Account type** is a custom schedule, the **Vary item** option allows you to enter a specific fee to be charged for this item. Refer to your practice manager for recommendations on using this field.
10. If an item requires service text, double-click the item to open the **Service text** popup. Click the **...** button to enter predefined invoice notes.
11. Enter any **Notes to reception** that you need to bring to the attention of the reception staff. Text entered here will pop up when reception staff create the patient account, and will be recorded on the account notes. Provider notes do not appear anywhere on the invoice.
12. Tick the **Not normal aftercare** checkbox if the consultation is not normal aftercare. This will assist the reception staff and ensure that the account does not get rejected by Medicare if the patient has had other consultations.
13. Tick the **In hospital** checkbox if the consultation was performed in a hospital. This affects the fee to be charged.
14. If the consultation was performed in a nursing home, indicate the **No of patients** seen in total so that the correct fee will be charged.
15. If the provider is finished with the patient clinical record, click the **Save and Close** button.

    If further information needs to be recorded after the consultation, click the **Save** button and continue working within the patient record.

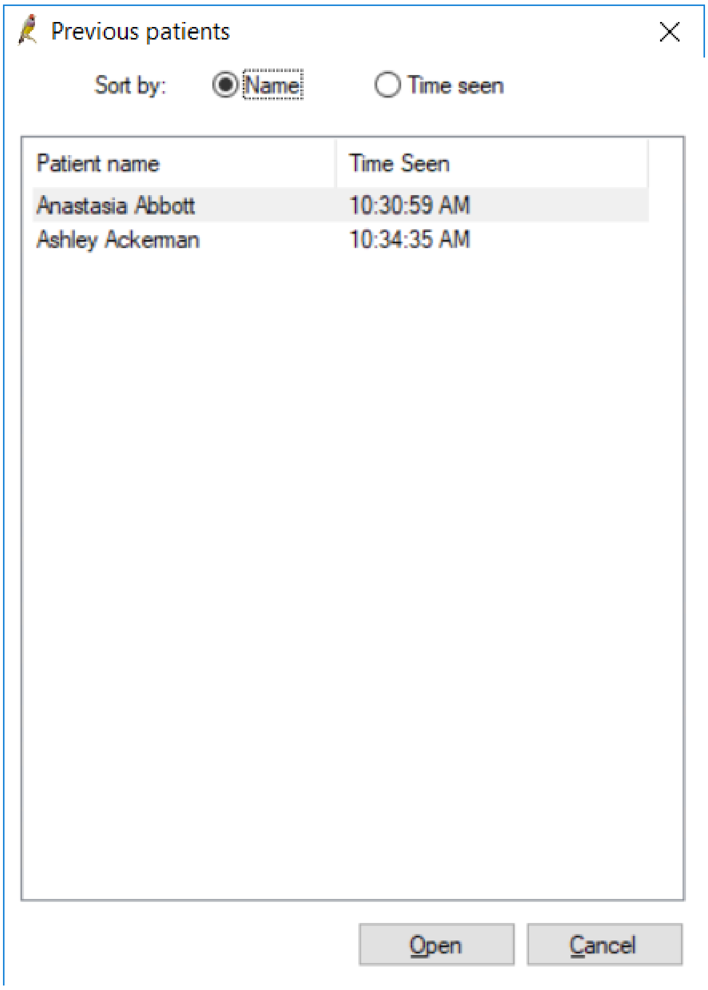
    Clicking either button will change the status of the appointment to **At Billing** (green shading) in the Waiting Room and Appointment Book.

Finalising the patient visit is complete. Front desk staff can now process payment.

Retrieve a patient seen that day

The **Previous Patients** screen shows all of the patients that have their record opened on a workstation that day for the logged-in user, and when they were seen. This screen is a convenient shortcut if a provider needs to reopen a record for a patient seen earlier. If a patient has seen multiple providers in one day, the patient will appear on all of the providers' **Previous Patients** screen.

To view the **Previous Patients** screen, press Shift+F2, or from the main screen select **View** > **Previous patients**.



Find, move, or cancel an appointment

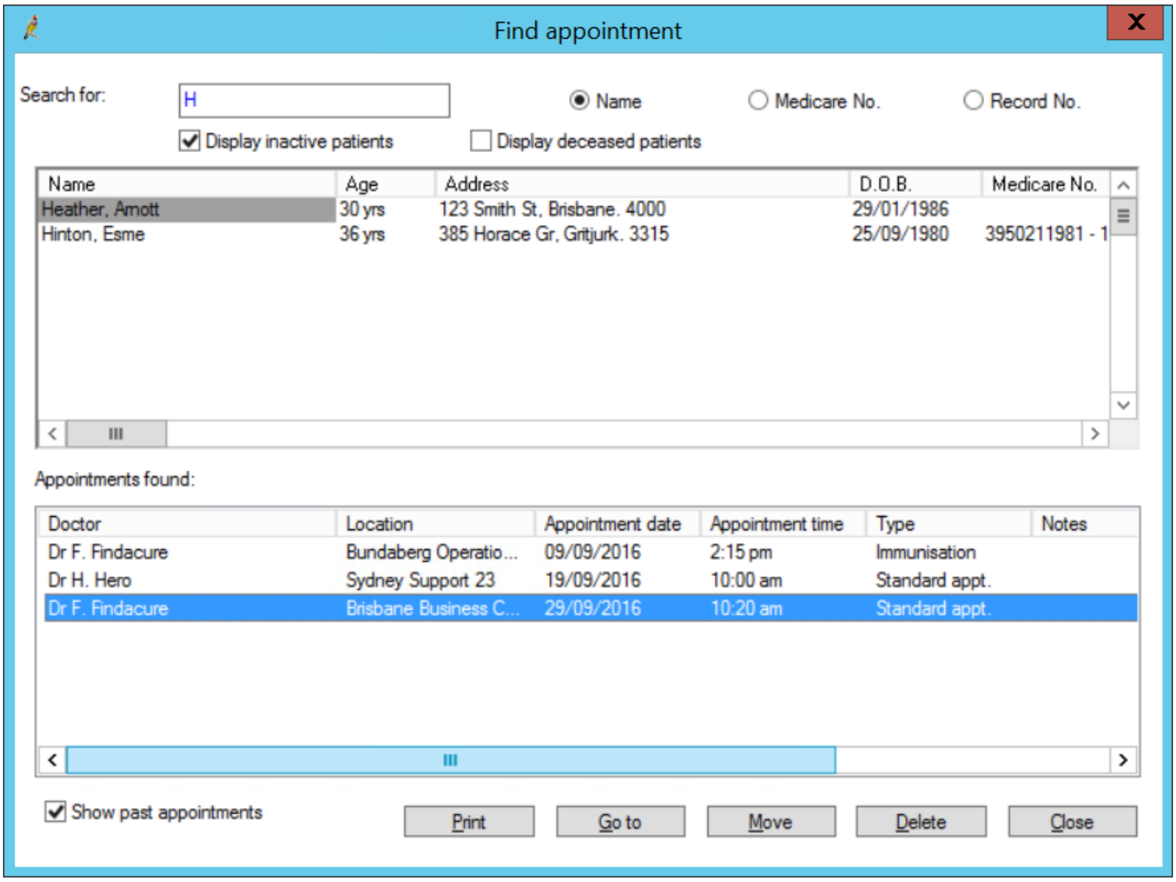
The **File** and right-click context menus in the appointment book provide options for cancelling and rescheduling appointments. You can also view the users who have created and updated an appointment for auditing purposes.

Swiping a patient's Medicare card while the appointment book is open also provides some shortcuts.

All of the following procedures start from the appointment book.

Find an appointment

1. Press F2 or select **File** > **Find appointment**. The **Find appointment** screen will appear.



2. Enter a partial surname into the **Search for** field to search for a patient, or select to search by **Medicare No.** or **Record No.**
3. Select a patient in the top list to view that patient's appointments in the bottom list, from oldest at the top to most recent at the bottom.

4. Tick **Show past appointments** to also display historic appointments for this patient.
5. Select the appointment you want from the bottom list and click a button to action the appointment:

- **Print** — Prints the appointment.
- **Go to** — Opens the appointment book at the appointment.
- **Move** — Opens the **Move appointment** screen to select another time.
- **Delete** — Cancels the appointment. Bp Premier will ask for a cancellation reason.
- **Close** — Closes the screen with no changes.

Cancel an appointment

You can cancel future appointments if the patient or provider becomes unavailable, for example. You may be able to cancel a past uncompleted appointment, depending on the current status. You can also use the **Uncompleted appointments** screen to resolve past appointments. See **Book or update an appointment on page 5** for more information.

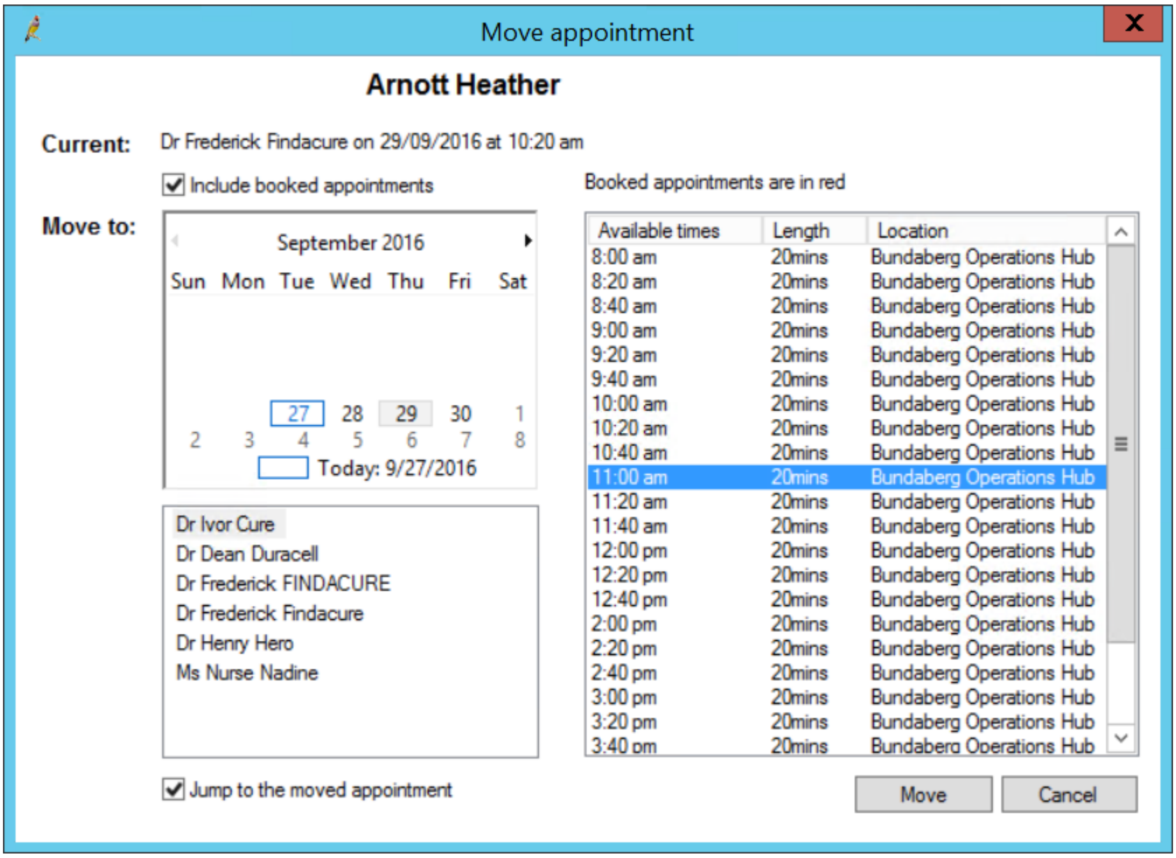
1. Find the appointment in the appointment book. Press F2 to search for the appointment by patient name if necessary.
2. Right-click the appointment and select **Cancel appointment**. Select a reason the appointment was cancelled, or enter a reason as free text and click **Yes**.

The appointment will be removed from the appointment book.

NOTE Cancelled appointments can be viewed using the **Cancelled appointments** utility.

Move an appointment

1. Find the appointment in the appointment book. Press F2 to search for the appointment by patient name if necessary.
2. Right-click the appointment and select **Move appointment**. The **Move appointment** screen will appear.

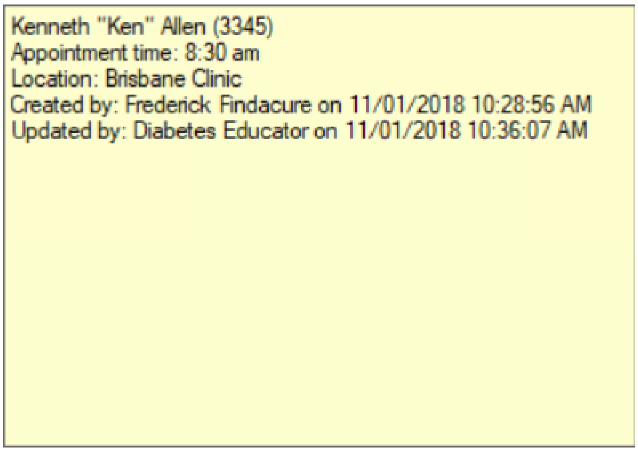


3. Select the day from the **Move to** calendar to move the appointment, and select a doctor from the list. The list on the right hand side will show available appointment slots on that day.
4. Tick **Include booked appointments** to show all appointments.
5. Tick **Jump to the moved appointment** to open the appointment at the new appointment when finished.
6. Select the appointment slot to move to and click **Move**.

See who created or updated a booking

To view who created and updated an appointment, select the appointment and press F10 or right-click and select **View Text**.

The **Created by** line shows who created or moved a booking. The **Updated by** line shows who last updated a booking.

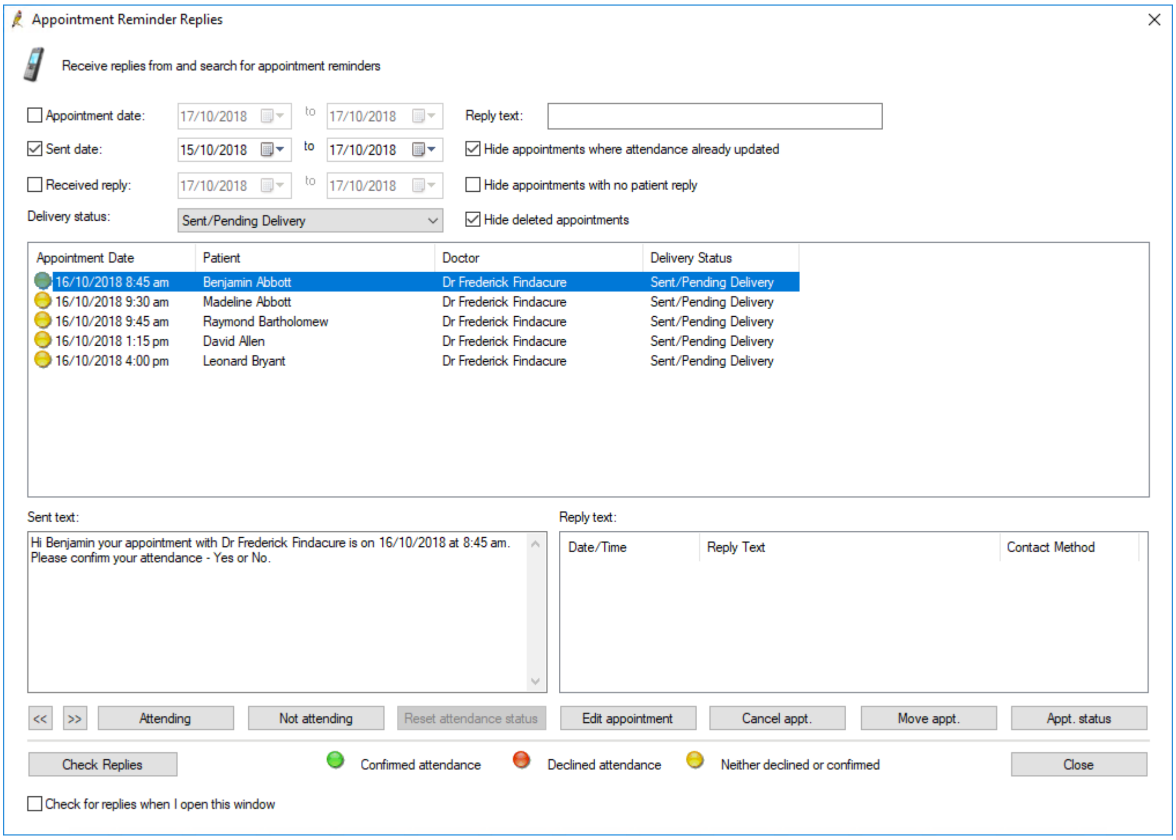

Kenneth "Ken" Allen (3345)
Appointment time: 8:30 am
Location: Brisbane Clinic
Created by: Frederick Findacure on 11/01/2018 10:28:56 AM
Updated by: Diabetes Educator on 11/01/2018 10:36:07 AM

Check appointment reminder replies

While checking for replies to Bp Comms appointment reminders you can cancel, move, edit, or change the status of related appointments.

If you have set up appointment confirmation, you should not need to manually update the appointment book based on patient replies. However, if a patient has replied with a non-standard response, you can use the **Appointment Reminder Replies** window to review such replies.

1. From the appointment book, select **Utilities** > **Check Appointment Reminder Replies**. The **Appointment Reminder Replies** window is displayed.



2. Search for replies using the fields at the top left:
   - Appointment date range
   - Sent date range
   - Date range during which reply was received
   - Delivery status
3. Filter the appointments shown using the checkboxes at the top right:

- Type text in **Reply text** to search for replies containing that text
- **Hide appointments when attendance already updated** will only show appointments which have not been confirmed or declined
- **Hide appointments with no patient reply** only shows appointment reminders that have been replied to by a patient
- **Hide deleted appointments** removes deleted appointments from display.

4. The middle section of the screen shows the appointment reminders that have been sent and the status. Select a message to see the **sent text** of the reminder and the **reply text**, if any.
5. Click **Check Replies** to check for any new replies that have been received. Bp Premier will show all replies received, with the most recent at the top of the list.
6. Tick the checkbox **Check for replies when I open this window** to check for replies automatically.

Action appointments

If the patient has replied 'Yes' or 'No' (or any acceptable reply that has been configured in **Setup** > **Configuration** > **Appt Reminders**), appointment attendance status is automatically updated. Other responses will require manual update of appointment attendance status.

7. To update the appointment associated with a reply, select the SMS reply from the list and click one of the action buttons along the bottom.

Button	Description
Attending	Mark the appointment as attendance confirmed.
Not attending	Mark the appointment as attendance declined.
Reset attendance status	Reset attendance to neither confirmed nor declined.
Edit appointment	Edit appointment details. Not all details can be changed.
Cancel appt	Cancel the appointment and supply a reason.
Move appt	Move the appointment to another slot.
Appt status	Change the status of the appointment, such as to 'Did not attend'.

8. Click **Close** to close the reminder replies screen.

Rebook a patient from the cancellation list

The appointment book has a **cancellation list**, which holds patients who have future appointments but would like to be seen earlier if a cancellation occurs. If an appointment is cancelled, you can set the cancellation list to appear automatically.

Can I add a patient to a wait list without booking an appointment?

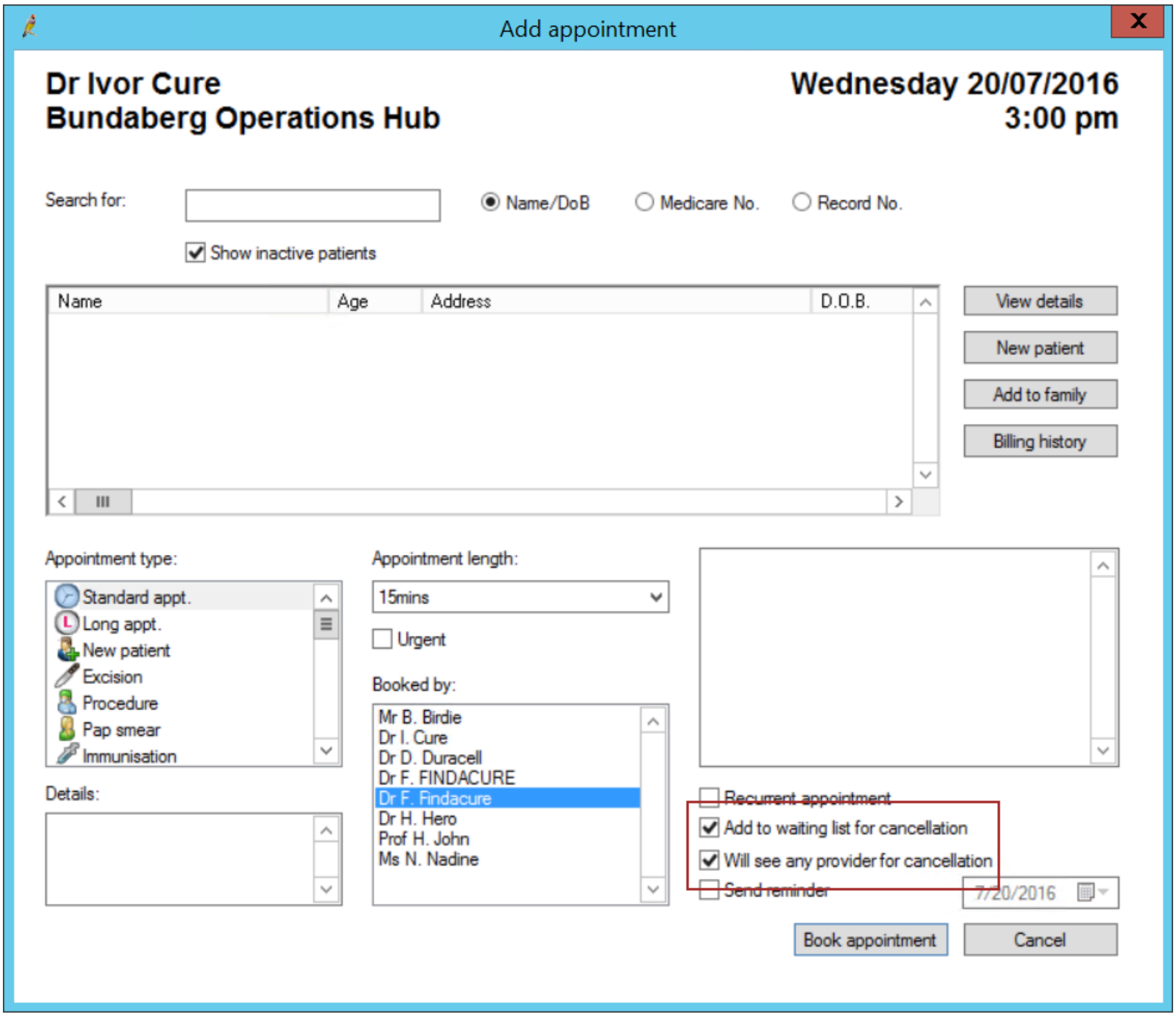
No. The cancellation list is for patients who have a future booking that can be moved forward. Bp Premier's appointment book does not have a 'wait list' that contains patients without a booking who are waiting for an available appointment that day.

Add a patient to the cancellation list

1. If you are booking an appointment for a patient, on the **Appointment details** screen, tick the **Add to waiting list for cancellation** checkbox as shown below.

   If the patient already has a booked appointment, right-click on the appointment and select **Edit Appointment**. Tick the **Add to waiting list for cancellation** checkbox.

2. If the patient is happy to see any provider if a cancellation occurs, not just their usual doctor, also tick the **Will see any provider for cancellations** checkbox.

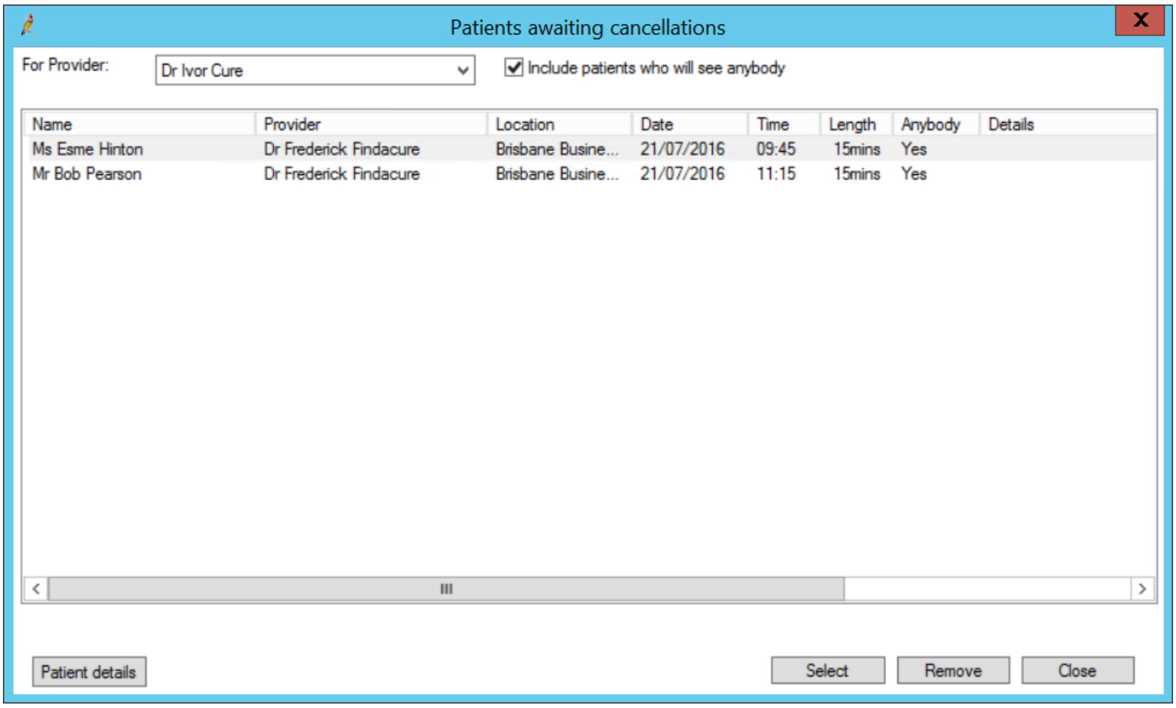


3. Click **Save** to save the appointment.

Bring forward a patient's appointment

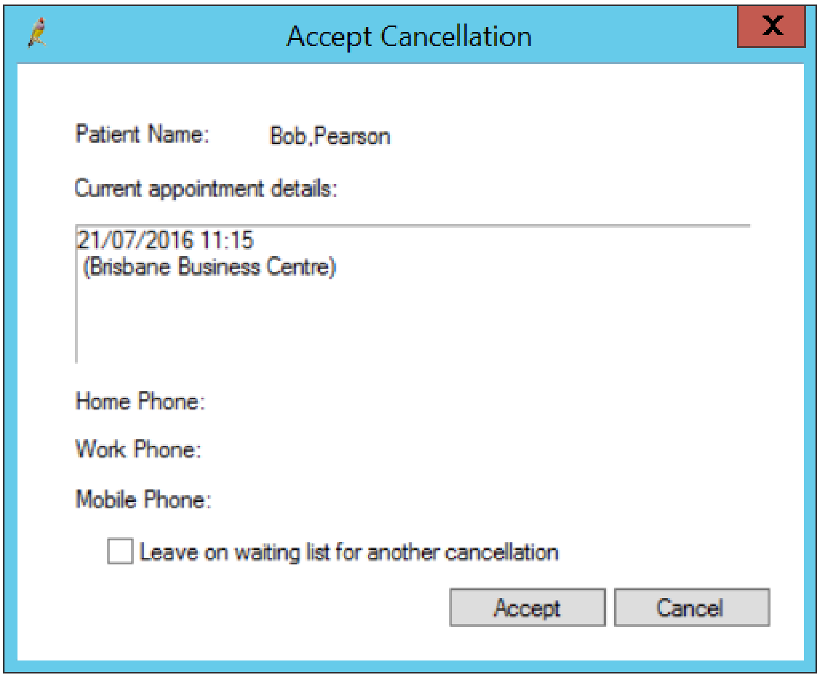
When an appointment is cancelled, the **cancellation list** screen can be used to bring forward a patient’s appointment.

1. Place the cursor in the appointment slot which is available and select **View** > **Waiting list for Cancellations** or press **Ctrl + F11**. The **Patients awaiting cancellations** screen will appear.



The screen lists all patients with future appointments who are waiting for a cancellation with the provider shown. The list is sorted in the order that patients were added to the cancellation list.

2. To include patients waiting for cancellation who will see any doctor, tick **Include patient who will see anybody**.
3. If you need to access more information about the patient, click the **Patient details** button at the bottom of the screen.
4. To rebook a patient, select the patient in the list and click **Select**.
5. If the patient's original appointment is less than a week in the future, a message will appear. Click **Yes** to accept.
6. The **Accept cancellation** window will appear showing the patient's details.



7. To rebook the patient's appointment, click **Accept**.

   To keep the patient on the waiting list, tick the **Leave on waiting list for another cancellation** box and click **Accept**.

   You will return to the appointment book.

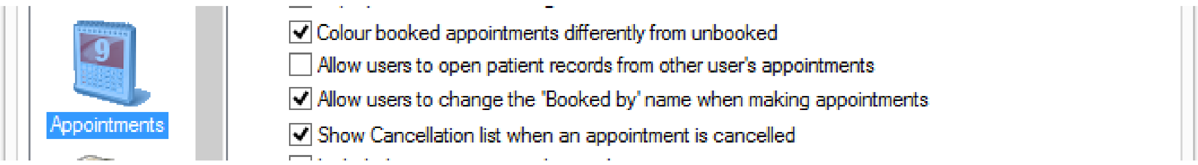
Remove a patient from the cancellation list

1. Place the cursor in any appointment slot which is available and select **View** > **Waiting list for Cancellations** or press **Ctrl + F11**. The **Patients awaiting cancellations** screen will appear.
2. Select the patient from the list and click **Remove**.
3. Click **Yes** at the prompt.
4. Click **Close** to close the cancellations list.

Automatically display the cancellation list

You can set the cancellation list to automatically appear whenever an appointment is cancelled, to help staff remember to fill cancelled appointments.

1. Select **Setup** > **Configuration** from the main Bp Premier screen.
2. Select the **Appointments** tab.
3. Tick the **Show Cancellation list when an appointment is cancelled** checkbox.
4. Click **Save** to save changes.


Appointments
Colour booked appointments differently from unbooked
Allow users to open patient records from other user's appointments
Allow users to change the 'Booked by' name when making appointments
Show Cancellation list when an appointment is cancelled

Keyboard shortcuts

The following shortcuts are available from the server or workstation desktop:

- **Ctrl+Shift+B** — Opens Bp Premier
- **Ctrl+Shift+P** — Opens the Bp Premier backup utility.

Main screen

Key		Ctrl+	Shift+
F2	Open patient	Find Invoice	Previous patients
F3	Inbox	Create patient account	Setup > Configuration
F4	Word processor	Process payment	Setup > Users
F5	Refresh screen	Account holder history	Setup > Preferences
F6	To Do List	Patient billing history	Setup > Sessions
F7	Log out current user	Banking batches	Setup > Practice Fees
F8	Internal messages	Debtors list	
F9	Print stored prescriptions	Online claiming (bulk billing)	
F10	Patient list	Reports	
F11	Contacts		
F12	Appointment book	Waiting room	MIMS

Provider Inbox

Keyboard shortcut	Action
Ctrl+N	Indicate Normal result.
Ctrl+A	No action required.
Ctrl+P	Print report.
Alt+R	Add reminder to patient.
Alt+A	Add action.
Alt+S	Add to past history.
Alt+M	Add cervical screen.

Keyboard shortcut	Action
Alt+I	Add INR.
Alt+P	Previous result.
Alt+X	Next result.
Alt+K	Skip.
Alt+N	Finish and close.

Patient record

Key		Ctrl+	Alt+	Shift+
F2	Open patient	Export patient		
F3	New record (for item selected in patient tree)		Observations	Ceased Rx
F4	Word processor			Medical certificate
F5	Refresh screen		INR manager	
F6	To Do List	Request pathology	Outstanding requests	Request imaging
F7	Allergies and adverse reactions			
F8	Internal messages	Percentile charts	Blood group	Family & social history > Occupation
F9	Print current open record	Drug sheet		Print eHealth health summary
F10	Edit patient details	Family & social history > Family	Family & social history > Alcohol	Family & social history > Social
F11	Contacts		Inbox	
F12	Appointment book	Pharmaceutical product explorer	Travel medicine	Patient education materials

Patient tree view

Keyboard shortcut	Go to
Ctrl+Alt+T	Today's notes
Ctrl+Alt+V	Past visits
Ctrl+Alt+X	Current Rx

Keyboard shortcut	Go to
Ctrl+Alt+H	History
Ctrl+Alt+I	Immunisations
Ctrl+Alt+R	Investigation Reports
Ctrl+Alt+C	Correspondence Out
Ctrl+Alt+N	Correspondence In
Ctrl+Alt+P	Past prescriptions
Ctrl+Alt+O	Observations
Ctrl+Alt+F	Family/Social
Ctrl+Alt+Y	Obstetric
Ctrl+Alt+S	Cervical screening
Ctrl+Alt+E	EPC
Ctrl+Alt+A	Health assessments
Ctrl+Alt+L	Care plans
Ctrl+Alt+M	Medication reviews
Ctrl+Alt+D	Diabetes cycle of care

Appointment book

Key		Ctrl+	Shift+
F2	Find appointment		
F3	New appointment	Add account item	
F4	Arrive patient		
F5	Refresh screen		
F6	To Do List	Billing history	
F7	Process payment		
F8	Internal messages		
F9	Print day sheet		Print appointment list
F10	Account history		

Key		Ctrl+	Shift+
F11	Contacts		
F12	Waiting room		

Waiting room

Key		Ctrl+
F2	Start visit	
F3	Add to waiting room	Create account
F4	View notes	Close waiting room
F5	Refresh screen	
F6	To Do List	Billing history
F7	Process payment	
F8	Internal messages	
F10	Account history	
F11	Contacts	
F12	Waiting room	