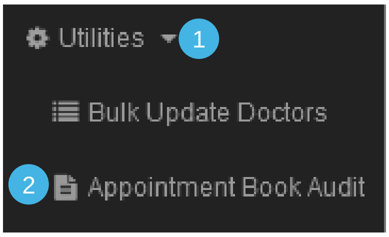
Appointment Book Audit Guide

This guide will take you through how to use Appointment Book Audit.

Access Appointment Book Audit

From the main menu:

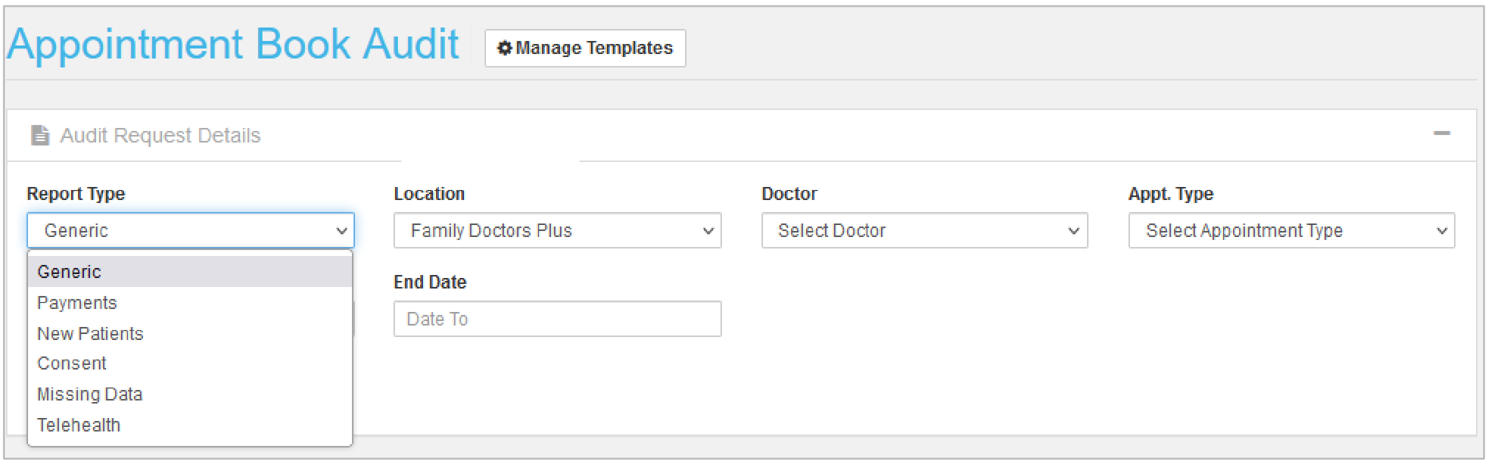
1. Select **Utilities**
2. Click **Appointment Book Audit**



Reports

There are six reports you can run in the **Appointment Book Audit**:

- **Generic:** View upcoming appointments. Enables you to bulk message patients and bulk change patients' appointments
- **Payments:** View upcoming appointments linked to payments
- **New Patients:** View upcoming New Patients' appointments. Enables you to see completed New Patient Registration Forms, and re-send forms if applicable
- **Consent:** View upcoming Appointments which require a Consent Form. Enables you to see completed Consent Forms, and re-send forms if applicable
- **Missing Data:** View patients who are missing the following information in their file - ATSI, Address, Medicare Details and Emergency contact details. Enables you to request patients to complete unfilled areas
- **Telehealth: Please Note:** Only available for AutoMed Systems Video Consult Appointment Types. View upcoming AutoMed Video Consults, enables you to resend the video link to patients



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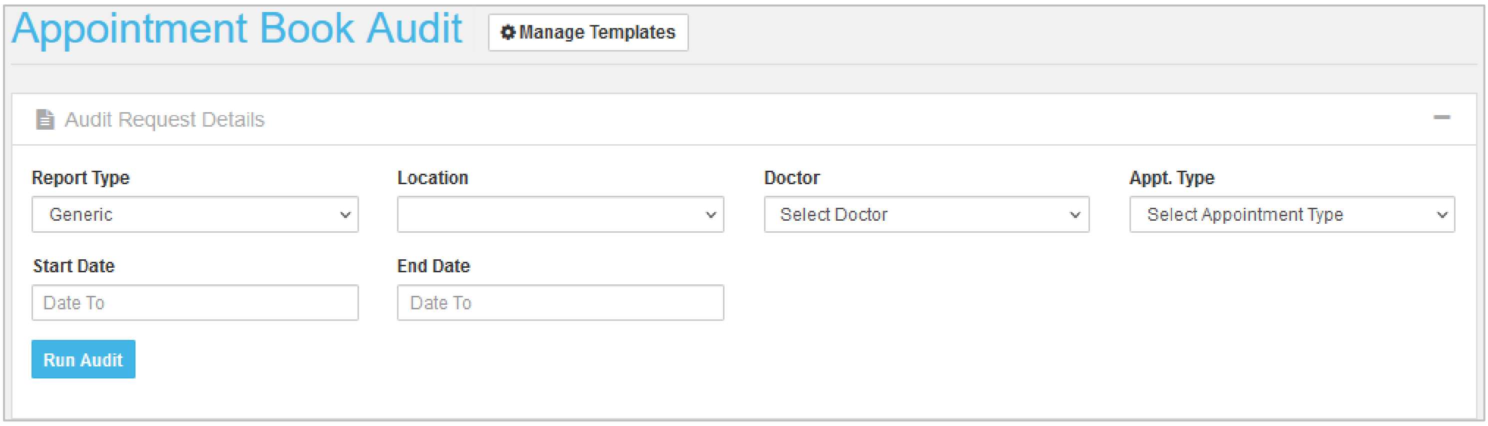
Filters

There are a range of filters to choose for the report. Listed below are what the filters will show you:

- **Report Type:** Choose the report you want to run
- **Location:** Choose the clinic location if applicable
- **Doctor:** Choose a Doctor to view their appointments, or leave as Select Doctor to view all Doctors
- **Appointment Type:** Choose an appointment to view a specific appointment, or leave as Select Appointment Type to view all Appointments

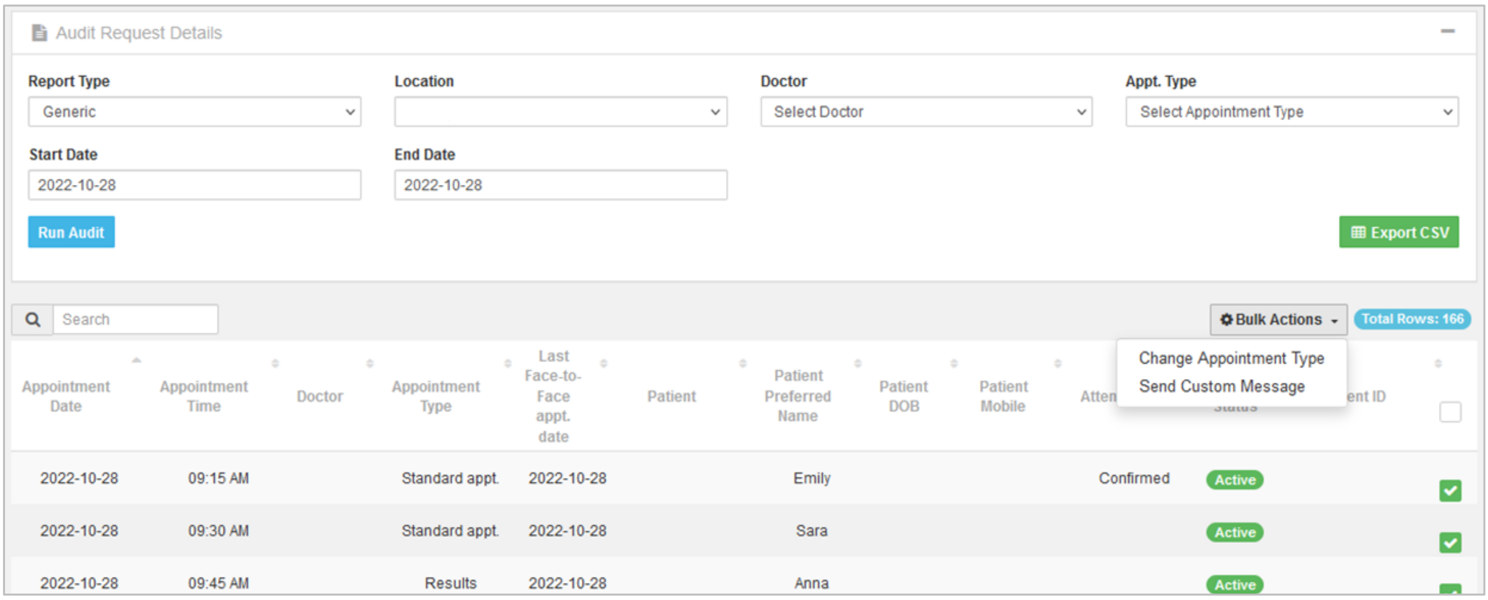


Generic Report

Use this Report: To view upcoming appointments

How can this Report be used: Run this report to view upcoming appointments, bulk message patients and bulk change patients' appointments

Bulk Actions in this Report: **Send Custom Message** and **Change Appointment Type** for patients.



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Generic Report – Bulk Actions

How can you use Bulk Actions?

Use **Send Custom Message** to send SMS messages to patients to advise them of changes to their appointment.

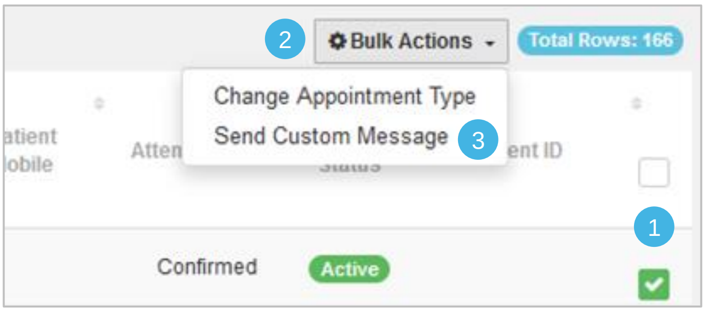
E.g., Doctor Unwell

Use **Change Appointment Type** to change the patient's appointment to a different appointment.

E.g. Change appointment from a Face to Face Appointment to Phone Consults

How to use Bulk Actions:

1. Select your patient row by ticking the **tick boxes** in the patient row, or by selecting the very **top tick box** to select all
2. Click **Bulk Actions**
3. Select **Custom Message** or **Change Appointment Type**

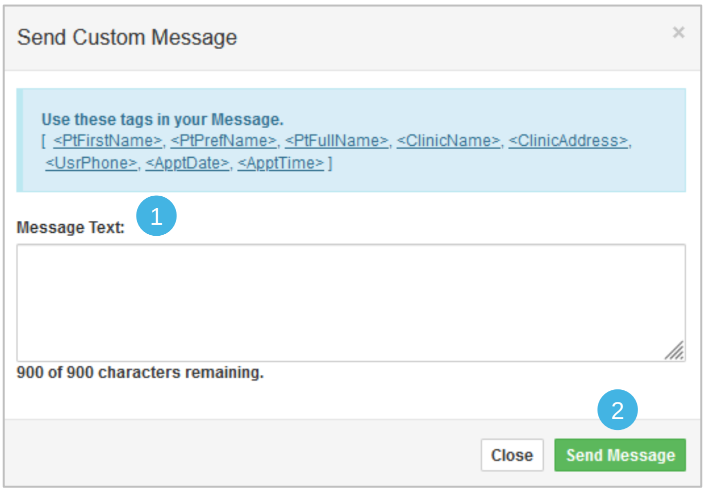


Send Custom Message

1. Write your message in the **text box**
2. Click **Send Message** to send to patients

Important:
Please use the tags to insert your patient information.

If you do not use the tags and write "Dear John," all patients will receive Dear John.



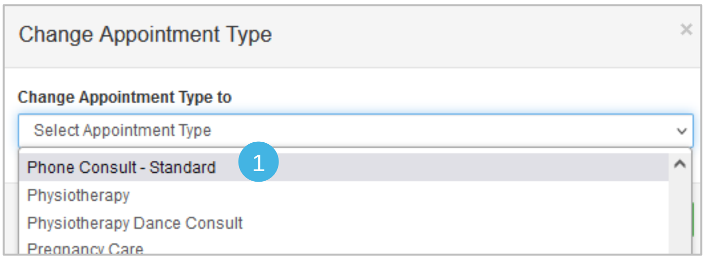
Change Appointment Type

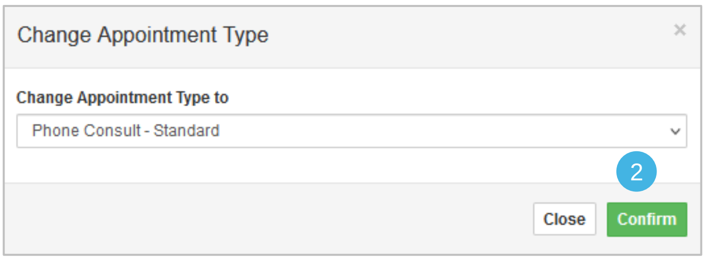
1. Select the **Appointment Type** from the drop down list
2. Click **confirm** to change the appointment

When changing an appointment to an **AutoMed Video Consult**, an automated SMS message is sent to all selected patients to inform them of the change to Telehealth.

The SMS message includes a single click Telehealth URL, patients can click to connect to their doctor at the time of the consult.

Please Note: This is only available for AutoMed Video Consults





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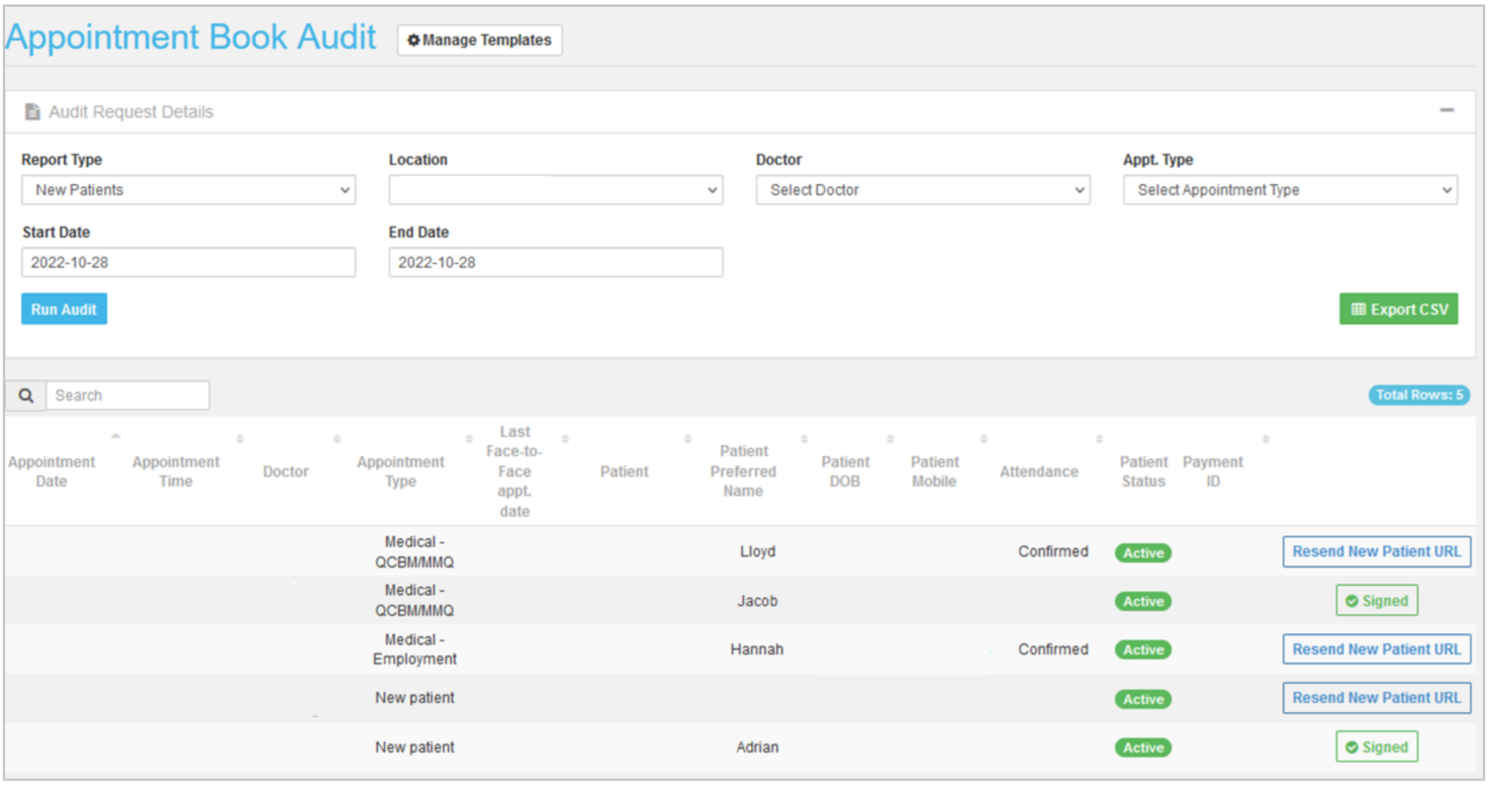
New Patient Report

Use this Report: To view upcoming New Patients’ appointments.

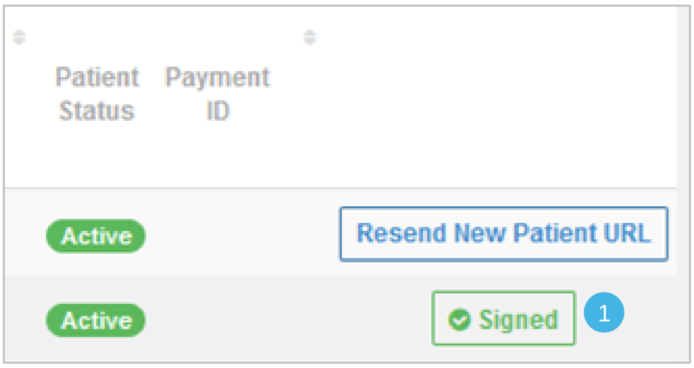
How can this Report be used: View completed New Patient Registration Forms, and re-send forms if applicable



View Completed Forms:

Completed New Patient Registration Forms will have **Signed** in the Patient Row.

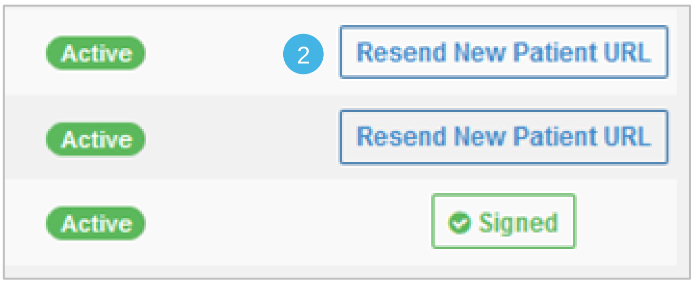
1. Click the **Sign Button** to preview the form



Resend the Form:

Patients who have not completed the form will have **Resend New Patient URL** in their row.

1. Click the **New Patient URL button** to resend the SMS



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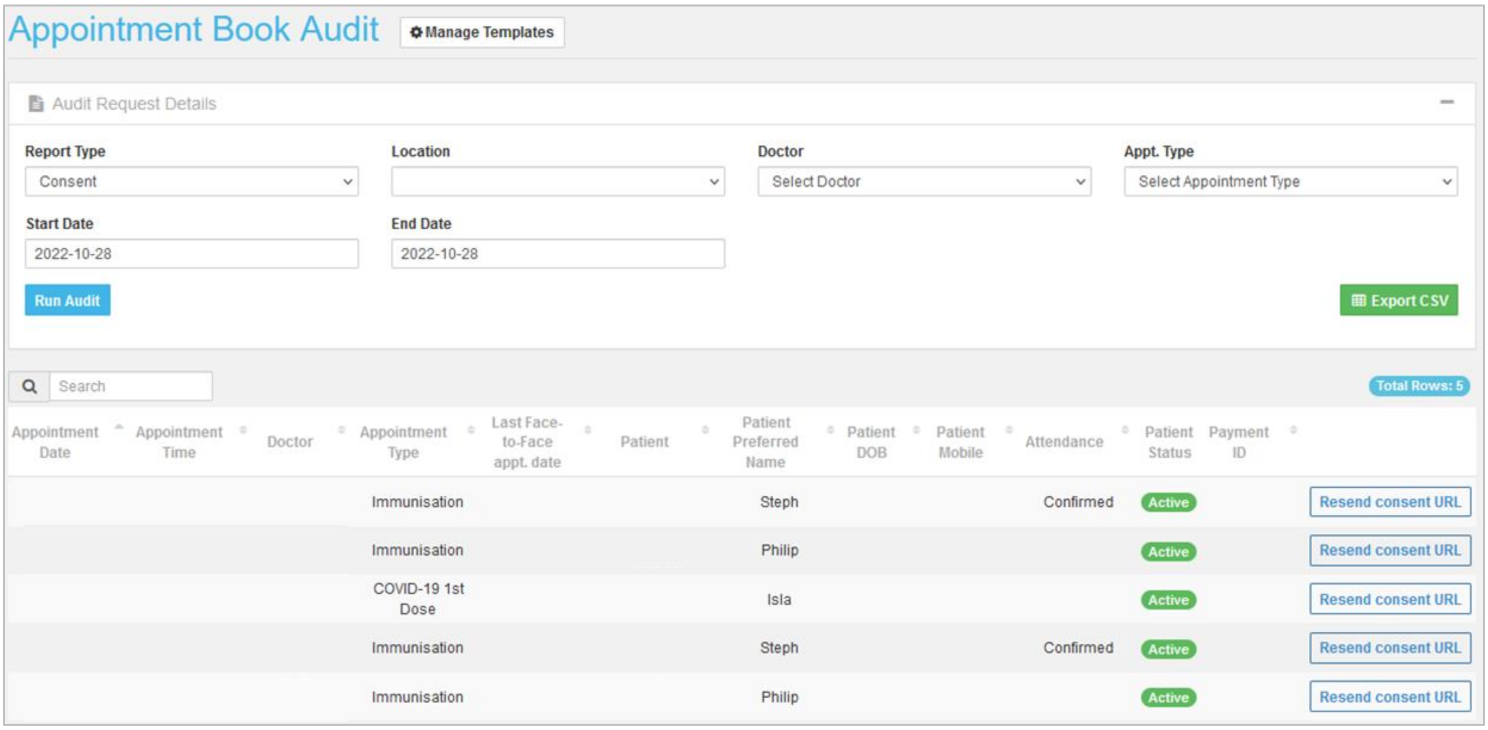
Consent Report

Use this Report: To view upcoming appointments linked to Consent forms

How can this Report be used: View completed Consent Forms, and re-send forms if applicable



View Completed Forms:

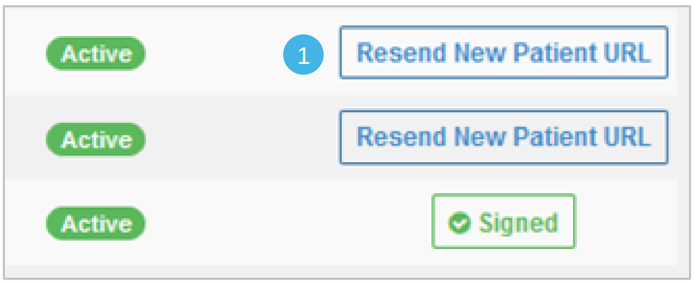
Completed Consent Forms will have **Signed** in the Patient Row.

1. Click the **Sign Button** to preview the form

Resend the Form:

Patients who have not completed the form will have **Resend Consent URL** in their row.

1. Click the **Consent URL button** to resend the SMS



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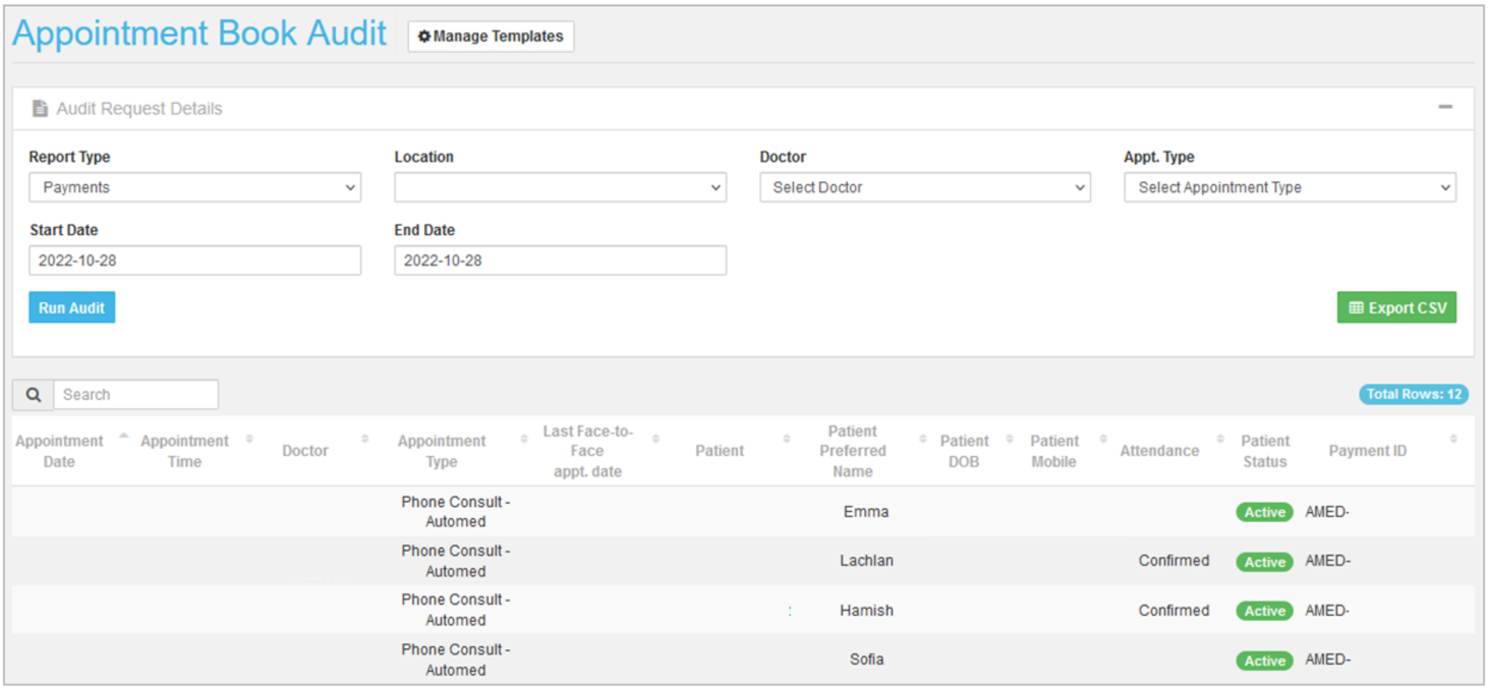
Payment Report

Use this Report: To view upcoming appointments linked to payments

How can this Report be used: Use this report to view appointments still waiting for an invoice to be created by the clinic

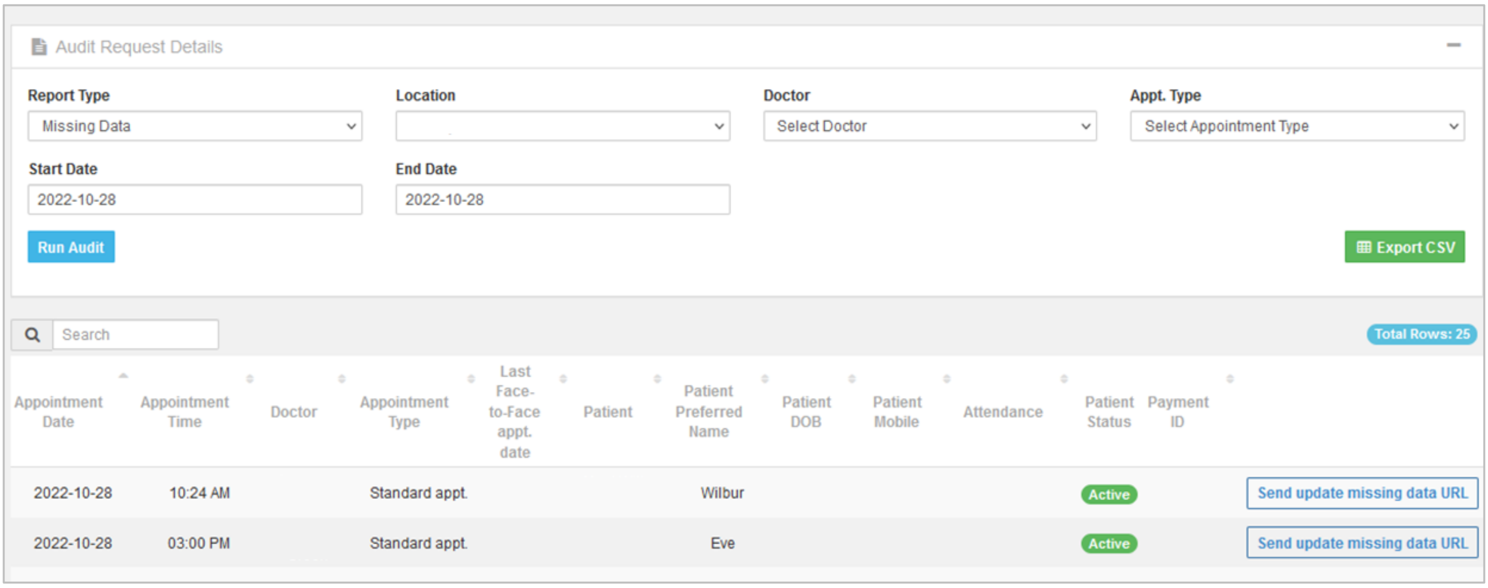
Please note: This report is used by Clinics that have active Online Payments via Tyro eCommerce.



Missing Data

Use this Report: To view patients who are missing the following information in their file - ATSI, Address, Medicare Details and Emergency contact details.

How can this Report be used: Use this report to send a secure message to patients, asking to update details. Details which are updated are written back into Best Practise and PracSoft automatically.



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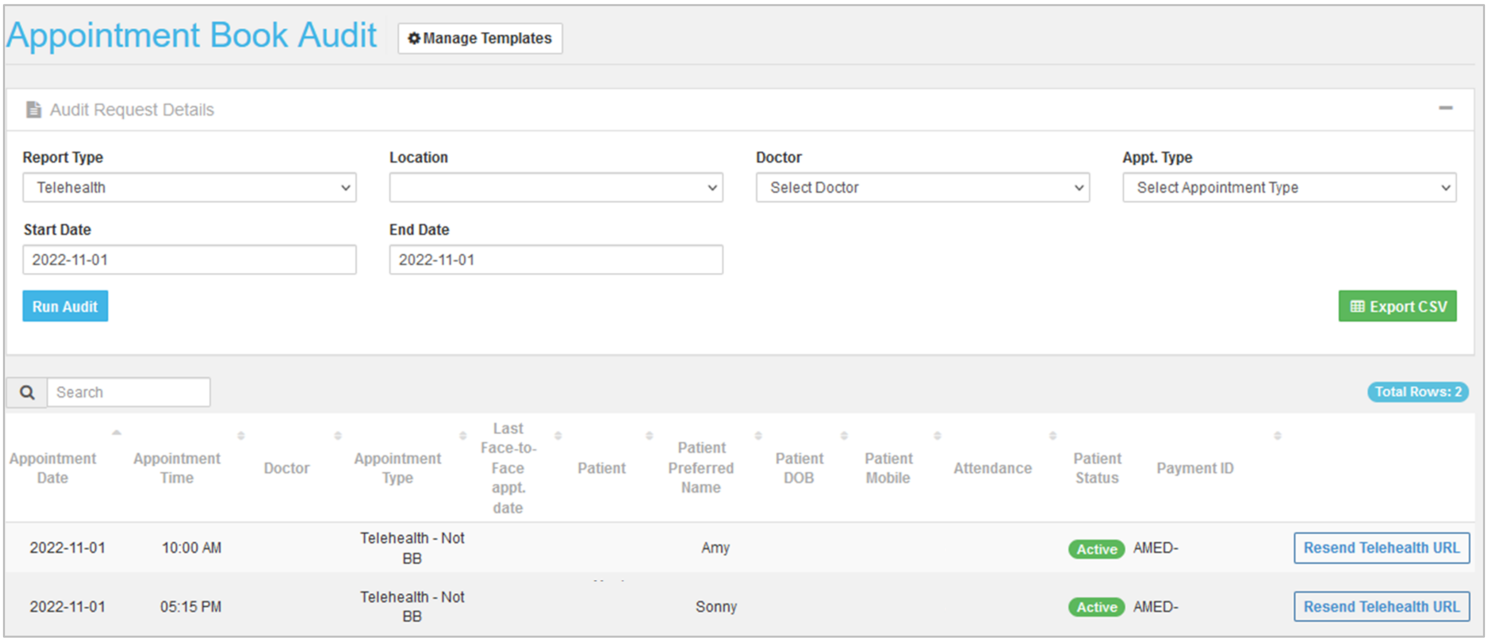
Telehealth Report

Use this Report: To view upcoming Appointment Video Consults

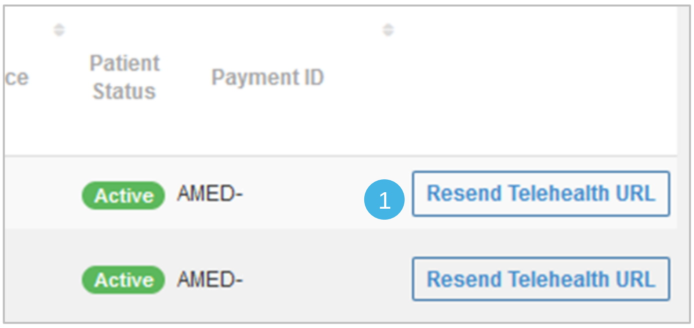
How can this Report be used: Use this report to send or re-send an AutoMed Video URL



Resend the Video Link:

To resend the video link to the patient:

1. Click the **Resend Telehealth URL button** to resend the video link to the patient



Video Consults completed

If the video consult has been completed, you'll see Consult Complete in the patient row.