

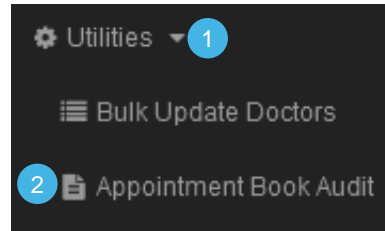
# Appointment Book Audit Guide

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

### Appointment Book Audit Manage Templates

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Audit Request Details -

<p><b>Report Type</b></p> <div style="border: 1px solid #ccc; padding: 2px;"> <span style="display: block; padding: 2px;">Generic ▾</span> <div style="border: 1px solid #ccc; padding: 2px; margin-top: 2px;"> <span style="padding: 2px;">Generic</span> <span style="padding: 2px;">Payments</span> <span style="padding: 2px;">New Patients</span> <span style="padding: 2px;">Consent</span> <span style="padding: 2px;">Missing Data</span> <span style="padding: 2px;">Telehealth</span> </div> </div>	<p><b>Location</b></p> <div style="border: 1px solid #ccc; padding: 2px; width: 100%;"> <span style="display: block; padding: 2px;">Family Doctors Plus ▾</span> </div>	<p><b>Doctor</b></p> <div style="border: 1px solid #ccc; padding: 2px; width: 100%;"> <span style="display: block; padding: 2px;">Select Doctor ▾</span> </div>	<p><b>Appt. Type</b></p> <div style="border: 1px solid #ccc; padding: 2px; width: 100%;"> <span style="display: block; padding: 2px;">Select Appointment Type ▾</span> </div>
<p><b>End Date</b></p> <div style="border: 1px solid #ccc; padding: 2px; width: 100%;"> <span style="display: block; padding: 2px;">Date To</span> </div>			

# Appointment Book Audit Guide

## 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

### Appointment Book Audit Manage Templates

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**Audit Request Details**

**Report Type**

**Location**

**Doctor**

**Appt. Type**

**Start Date**

**End Date**

[Run Audit](#)

## 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.

**Audit Request Details**

**Report Type**

**Location**

**Doctor**

**Appt. Type**

**Start Date**

**End Date**

[Run Audit](#) [Export CSV](#)

Search

Bulk Actions Total Rows: 166

Appointment Date	Appointment Time	Doctor	Appointment Type	Last Face-to-Face appt. date	Patient	Patient Preferred Name	Patient DOB	Patient Mobile	Attention	Status	Patient ID
2022-10-28	09:15 AM		Standard appt.	2022-10-28	Emily				Confirmed	Active	
2022-10-28	09:30 AM		Standard appt.	2022-10-28	Sara					Active	
2022-10-28	09:45 AM		Results	2022-10-28	Anna					Active	

# Appointment Book Audit Guide

## 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.

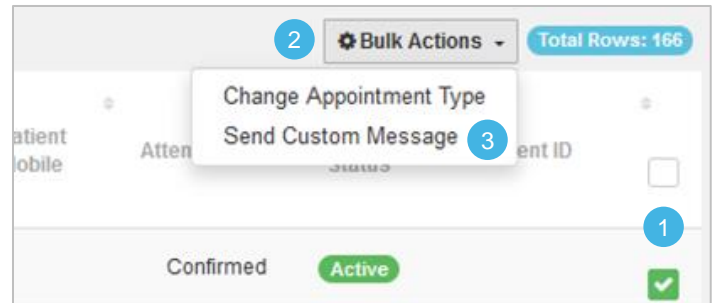
E.g., Doctor Unwell

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**



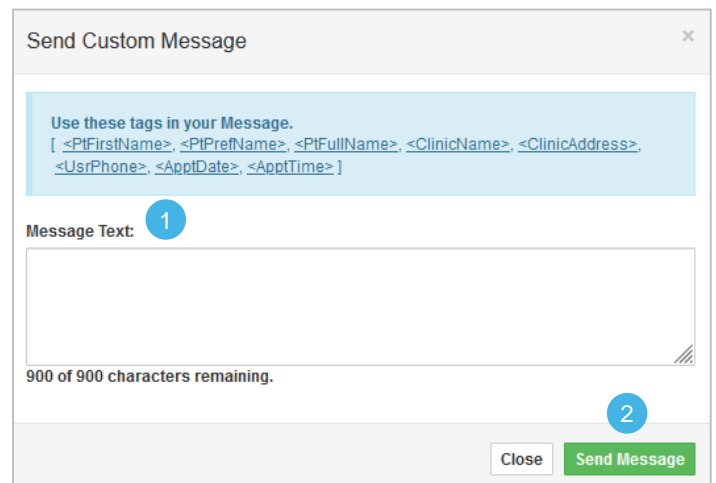
### Send Custom Message

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.



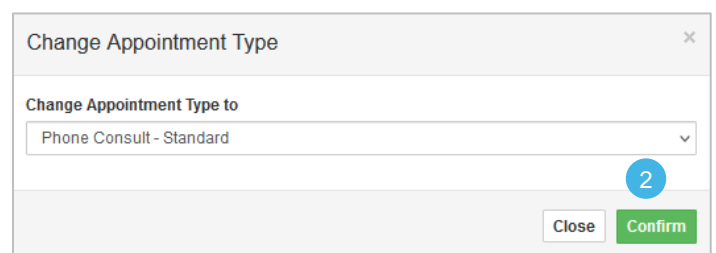
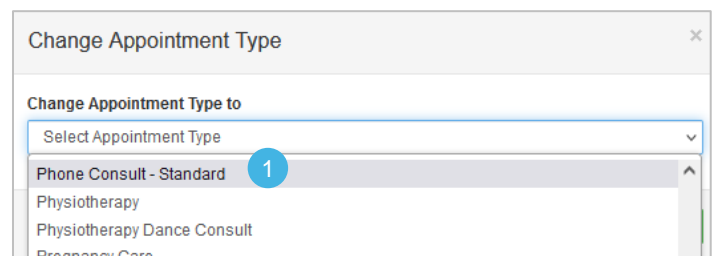
### Change Appointment Type

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



# Appointment Book Audit Guide

## 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

### Appointment Book Audit Manage Templates

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**Audit Request Details**

<b>Report Type</b> New Patients	<b>Location</b> 	<b>Doctor</b> Select Doctor	<b>Appl. Type</b> Select Appointment Type
<b>Start Date</b> 2022-10-28	<b>End Date</b> 2022-10-28		

Run Audit Export CSV

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Search Total Rows: 5

Appointment Date	Appointment Time	Doctor	Appointment Type	Last Face-to-Face appt. date	Patient	Patient Preferred Name	Patient DOB	Patient Mobile	Attendance	Patient Status	Payment ID
			Medical - QCBMMM			Lloyd			Confirmed	Active	Resend New Patient URL
			Medical - QCBMMM			Jacob				Active	Signed
			Medical - Employment			Hannah			Confirmed	Active	Resend New Patient URL
			New patient							Active	Resend New Patient URL
			New patient			Adrian				Active	Signed

### View Completed Forms:

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

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

Patient Status	Payment ID
Active	Resend New Patient URL
Active	Signed <span style="border: 1px solid #28a745; border-radius: 50%; padding: 2px 5px;">1</span>

### 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

Active	<span style="border: 1px solid #28a745; border-radius: 50%; padding: 2px 5px;">2</span> Resend New Patient URL
Active	Resend New Patient URL
Active	Signed

# Appointment Book Audit Guide

## 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

**Appointment Book Audit** Manage Templates

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**Audit Request Details**

Report Type Consent	Location	Doctor Select Doctor	Appt. Type Select Appointment Type
Start Date 2022-10-28	End Date 2022-10-28		

[Run Audit](#) [Export CSV](#)

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Search  Total Rows: 5

Appointment Date	Appointment Time	Doctor	Appointment Type	Last Face-to-Face appl. date	Patient	Patient Preferred Name	Patient DOB	Patient Mobile	Attendance	Patient Status	Payment ID	
			Immunisation			Steph			Confirmed	Active		<a href="#">Resend consent URL</a>
			Immunisation			Philip				Active		<a href="#">Resend consent URL</a>
			COVID-19 1st Dose			Isla				Active		<a href="#">Resend consent URL</a>
			Immunisation			Steph			Confirmed	Active		<a href="#">Resend consent URL</a>
			Immunisation			Philip				Active		<a href="#">Resend consent URL</a>

### View Completed Forms:

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

- Click the **Sign Button** to preview the form

Active

✔ Signed

1

### Resend the Form:

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

- Click the **Consent URL button** to resend the SMS

Active

1

Resend New Patient URL

Active

Resend New Patient URL

Active

✔ Signed

# Appointment Book Audit Guide

## 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.

### Appointment Book Audit Manage Templates

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**Audit Request Details**

<b>Report Type</b> Payments	<b>Location</b> 	<b>Doctor</b> Select Doctor	<b>Appt. Type</b> Select Appointment Type
<b>Start Date</b> 2022-10-28	<b>End Date</b> 2022-10-28		

[Run Audit](#) [Export CSV](#)

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Search Total Rows: 12

Appointment Date	Appointment Time	Doctor	Appointment Type	Last Face-to-Face appt. date	Patient	Patient Preferred Name	Patient DOB	Patient Mobile	Attendance	Patient Status	Payment ID
			Phone Consult - Automated			Emma				Active	AMED-
			Phone Consult - Automated			Lachlan			Confirmed	Active	AMED-
			Phone Consult - Automated			Hamish			Confirmed	Active	AMED-
			Phone Consult - Automated			Sofia				Active	AMED-

## 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.

### Audit Request Details

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<b>Report Type</b> Missing Data	<b>Location</b> 	<b>Doctor</b> Select Doctor	<b>Appt. Type</b> Select Appointment Type
<b>Start Date</b> 2022-10-28	<b>End Date</b> 2022-10-28		

[Run Audit](#) [Export CSV](#)

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Search Total Rows: 26

Appointment Date	Appointment Time	Doctor	Appointment Type	Last Face-to-Face appt. date	Patient	Patient Preferred Name	Patient DOB	Patient Mobile	Attendance	Patient Status	Payment ID
2022-10-28	10:24 AM		Standard appt.		Wilbur					Active	
2022-10-28	03:00 PM		Standard appt.		Eve					Active	

# Appointment Book Audit Guide

## 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

### Appointment Book Audit Manage Templates

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**Audit Request Details**

Report Type Telehealth	Location	Doctor Select Doctor	Appt. Type Select Appointment Type
Start Date 2022-11-01	End Date 2022-11-01		

Run Audit Export CSV

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Search Total Rows: 2

Appointment Date	Appointment Time	Doctor	Appointment Type	Last Face-to-Face appt. date	Patient	Patient Preferred Name	Patient DOB	Patient Mobile	Attendance	Patient Status	Payment ID	
2022-11-01	10:00 AM		Telehealth - Not BB			Amy				Active	AMED-	<span>Resend Telehealth URL</span>
2022-11-01	05:15 PM		Telehealth - Not BB			Sonny				Active	AMED-	<span>Resend Telehealth URL</span>

### 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

Patient Status	Payment ID	
Active	AMED-	<span>1</span> <span>Resend Telehealth URL</span>
Active	AMED-	<span>Resend Telehealth URL</span>

### Video Consults completed

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

Patient Status	Payment ID	
Active		<span>Consult completed</span>
Active	No CC	<span>Consult completed</span>
Active		<span>Consult completed</span>