

Access and Set Up - Scheduling Appointment Book Set Up



This Quick Reference Guide will explain how to:

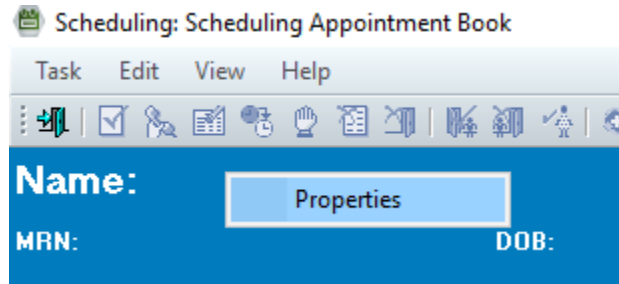
Set Up the default settings for **Scheduling Appointment Book (Schapptbook)**

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Demographics Bar

Right click on the **Demographics Bar** and select **Properties**



- The arrows will allow for increasing/decreasing the number of visible fields
- The following screenshots show the default attributes to be added to the **Demographics Bar**
- The values in brackets denote the position of the attribute within the bar and its size i.e. the Name attribute is in position 1 from the **Left** and 1 from the **Top**, and takes up 2 rectangles in **Width** and 1 in **Height**

Demographics Bar Properties

Name:		Custom Fiel...	Home Phon...	Custom Fiel...	Person Co...	Custom Fiel...	Custom Fiel...
MRN:	DOB:	Custom Fiel...	Custom Fiel...	Custom Fiel...	Custom Fiel...	Custom Fiel...	Custom Fiel...
Allergies:	Custom Fiel...	Custom Fiel...	Custom Fiel...	Custom Fiel...	Custom Fiel...	Custom Fiel...	Custom Fiel...

Attributes

Field	(Left,Top),(Width,Height)
Name	(1, 1),(2, 1)
MRN	(1, 2),(1, 1)
DOB	(2, 2),(1, 1)
Age	
Sex	

Ins Dates	
Home Phone	(4, 1),(1, 1)
Business Phone	

Field	(Left,Top),(Width,Height)
Person Comments	(6, 1),(1, 1)
Allergies	(1, 3),(1, 1)
Custom Field 01	(3, 1),(1, 1)
Custom Field 02	(2, 3),(1, 1)
Custom Field 03	(8, 2),(1, 1)



Field	(Left,Top),(Width,Height)	^
Custom Field 05	(8, 1),(1, 1)	
Custom Field 06	(8, 3),(1, 1)	
Custom Field 07	(3, 2),(1, 1)	
Custom Field 08	(3, 3),(1, 1)	
Custom Field 09	(5, 1),(1, 1)	▼

Field	(Left,Top),(Width,Height)	^
Custom Field 10	(6, 2),(1, 1)	
Custom Field 11	(6, 3),(1, 1)	
Custom Field 12	(7, 1),(1, 1)	
Custom Field 13	(7, 2),(1, 1)	
Custom Field 14	(4, 3),(1, 1)	▼

Field	(Left,Top),(Width,Height)	^
Custom Field 15	(5, 2),(1, 1)	
Custom Field 16	(5, 3),(1, 1)	
Custom Field 17	(4, 2),(1, 1)	
Custom Field 18	(7, 3),(1, 1)	▼

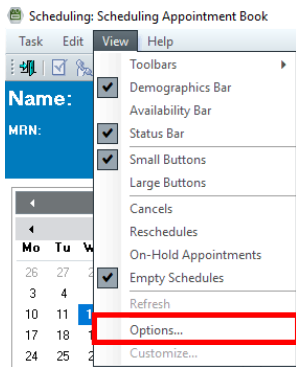
What each Custom Field represents is listed below:

Custom Fields

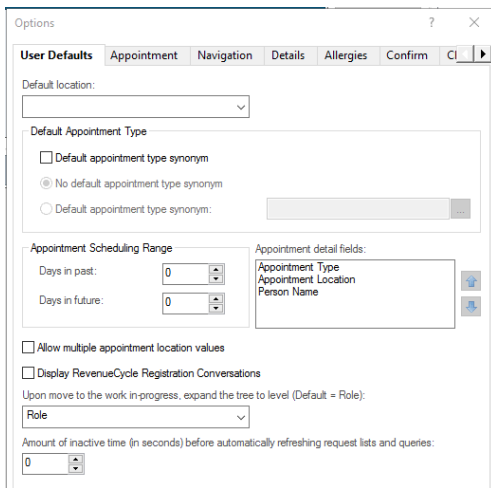
1. Deceased Indicator
2. Alert(s) Indicator
3. # of No Shows
4. Last Appointment
5. Last No Show
6. # of Cancellations
7. Sex, Age
8. Clinical Trial Indicator
9. Language
10. Street Address, Suburb, Postcode
11. Medicare Status
12. NOK + Phone
13. GP
14. Email Address
15. Interpreter Required
16. Indigenous Status
17. Mobile Phone
18. Current INP or ED

View > Options

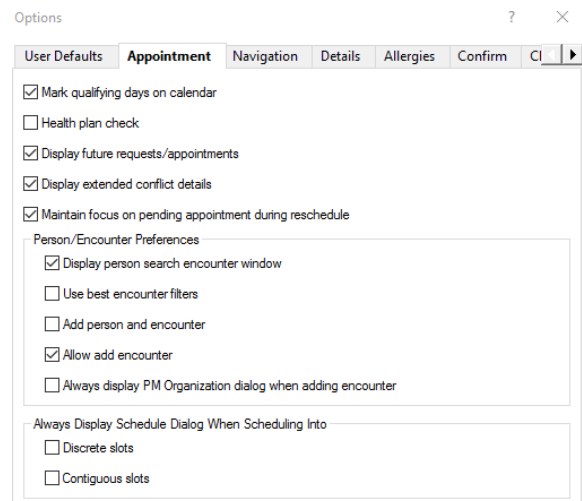
The following are the default setting for the **Scheduling Appointment Book View Options**



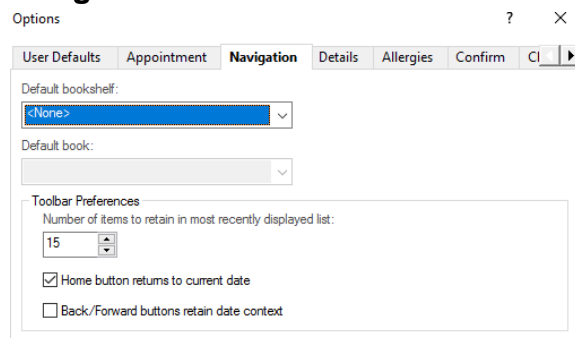
User Defaults Tab



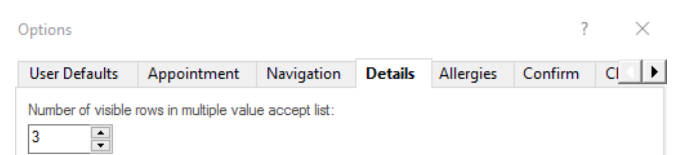
Appointment Tab



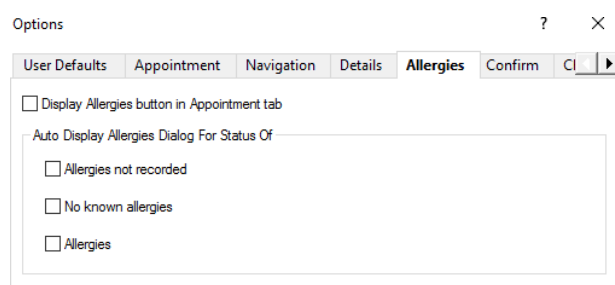
Navigation Tab



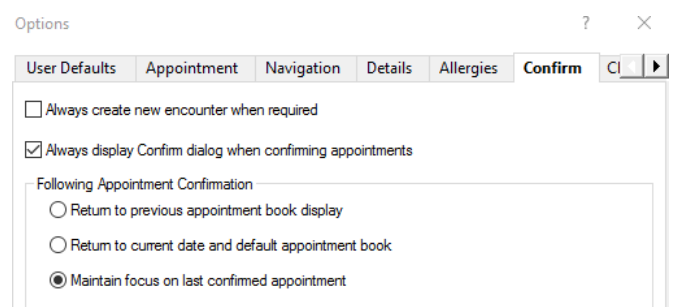
Details Tab



Allergies Tab



Confirm Tab



Check In Tab

Options ? X

Appointment Navigation Details Allergies Confirm **Check In** Check (◀▶)

Always create new encounter when required

Check In warning range (in mins):

Check Out Tab

Options ? X

Navigation Details Allergies Confirm Check In **Check Out** Request C (◀▶)

Discharge Preferences

Allow discharge

Always discharge

Interactive discharge using discharge flex form

Discharge flex form:

Patient Tracking Preferences

Disable update patient tracking

Disable stop patient tracking

Default to update patient tracking

Request Criteria Tab

Options ? X

Details Allergies Confirm Check In Check Out **Request Criteria** (◀▶)

Request Date Range

Number of days in date range:

Infinite days in date range:

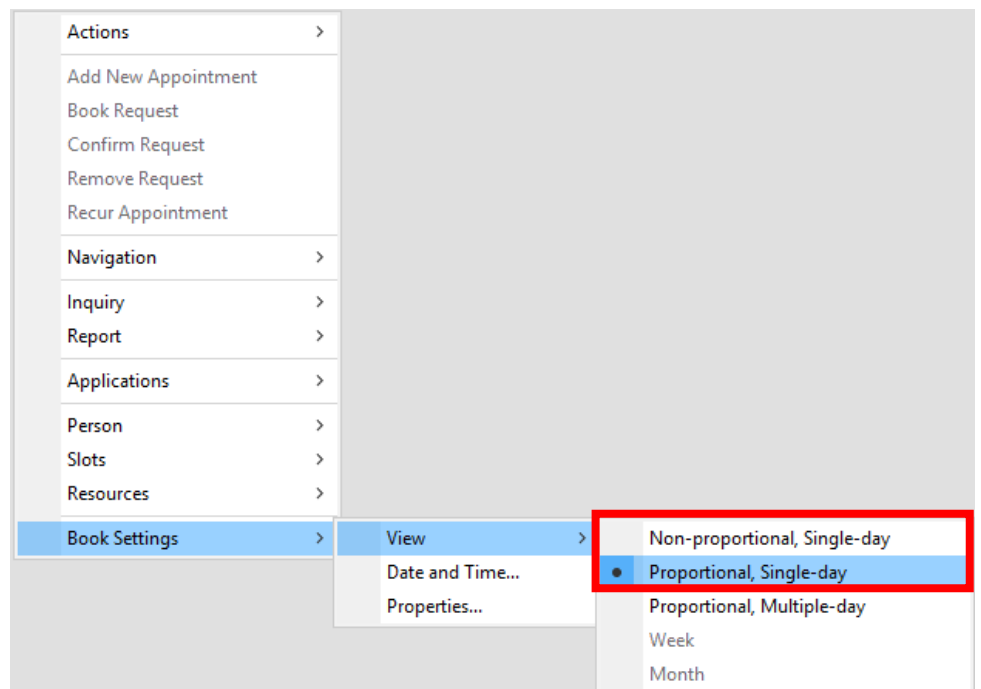
Default time range:

Defaulted days of week: Mon Tue Wed Thu Fri Sat Sun

Change the default grid view

1. Open the desired clinic in Schapptbook
2. Right click an area within a slot or grey space select Book Settings > View > Proportional, Single Day OR Non-proportional, Single Day. It is recommended clerks try both views and use the view that works for them.

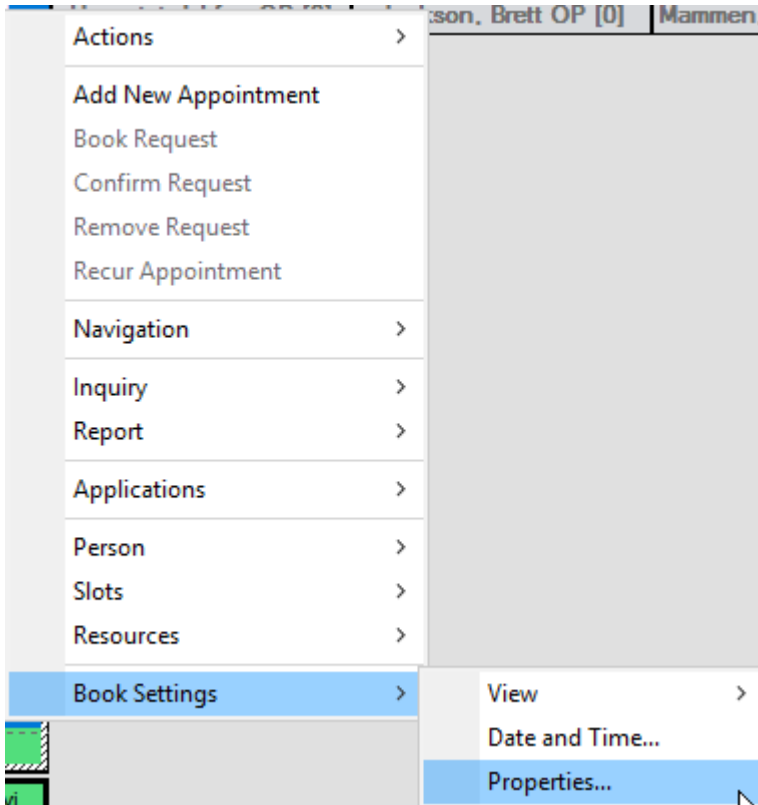
This will adjust your view of the book to show slots starting at different times



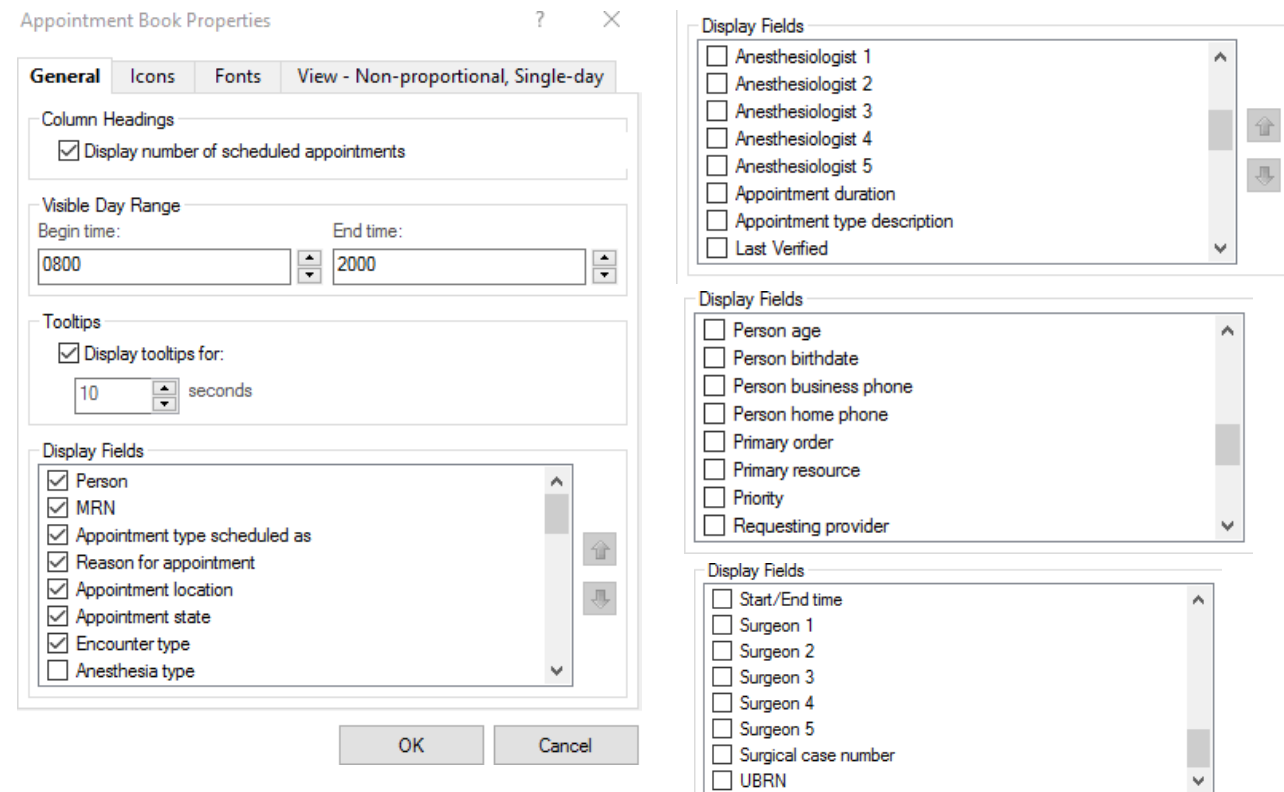


Appointment Book Settings > Properties

The following are the default setting for the **Book Settings**



General Tab



Icons Tab

Appointment Book Properties ? X

General **Icons** Fonts View - Non-proportional, Single-day

Slot icons:

- Comments
- Locks
- Group Session
- Information
- Release Times

Appointment icons:

- Allergies
- Comments
- Locks
- Pending Confirmation
- Warnings
- Appointment Linking
- Choose and Book
- Do Not Move
- Eligibility Status Ambiguous
- Eligibility Status Denied

OK Cancel

Appointment icons:

- Eligibility Status Denied
- Eligibility Status Error
- Eligibility Status Pending/Unknown
- Eligibility Status Verified
- Group Session
- Information
- Medical Necessity State Checked
- Medical Necessity State Printed
- Medical Necessity State Refused to Sign/Not Signed
- Medical Necessity State Signed

Appointment icons:

- Medical Necessity State Printed
- Medical Necessity State Refused to Sign/Not Signed
- Medical Necessity State Signed
- Move Down
- Move Up
- Patient Seen
- Protocol
- Recurring
- To Follow

Fonts Tab

Appointment Book Properties ? X

General Icons **Fonts** View - Non-proportional, Single-day

Font... Default

Microsoft Sans Serif

View – Non-proportional, Single-day Tab

Appointment Book Properties ? X

General Icons Fonts **View - Non-proportional, Single-day**

Display binder

Time interval: 5

Column Width (In Pixels)

Custom width: 150

Size to fit all, with minimum width:

Size to fit all

Appointment View

The following are the default tabs that appear in **Appointment View**

- Right click on the tabs and select **Preferences** to edit the visible tabs and their location

Appointment View ? X

Event Details Post Document General Scheduling Comments Booking Notes Orders Action Details Action History Correspondence Resources Instructions Guidelines Reports Warnings Request Information Request Details Allergies Linked Appointments and Requests

General Tab

Right click on the column headers and select **Preferences** to edit the visible columns and their location

General Offer Summary Move Criteria Details Orders Guidelines Notification Conversation Summaries Itineraries Locks Booking Notes

Comments:

FIN NBR URN Person Name Enc Type Est Arrive Date Med Service Fin Class Facility Nurse Unit Home Phone Reason For Visit Admitting Doctor Treating Dr VIP Visit Id