Communicare | Health Primary & Community

APPOINTMENT BOOK

V23.2 and later

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Appointment Book Configuration

Before your health service can use the appointment book, you must first configure the background information required for appointments and the appointment session templates that generate sessions into which appointments are booked.

Configure the following information:

1. Providers, select **File > Providers**. For more information, search for *providers* in the Communicare Knowledge Centre.
2. Rooms and facilities. For more information, see Appointment Facilities *(on page 5)*.
3. Appointment requirements. For more information, see Appointment Requirements *(on page 6)*.
4. Appointment session types.. For more information, see Appointment Session Type *(on page 6)*.
5. Public holidays. For information, see Public Holidays *(on page 6)*
6. Provider planned absences. For more information, see Provider Planned Absences *(on page 8)*
7. Appointment session templates. For more information, see Appointment Session Templates *(on page 8)*.

Appointment Facilities

A facility is an object that is needed on an exclusive basis for an appointment.

Before you begin

Normally a facility is a room, but it can also be something else such as a piece of test equipment.

The facility is associated with an Encounter Place to indicate the place where the facility is to be found. If required, create a new encounter place or mode before you create a facility to associate with it.

About this task

Procedure

To add a new facility:

1. Select **File > Reference Tables > Appointment Facilities**.
2. In the **Facility Maintenance** window, check that the facility you need is not in the list.
3. Click Add.
4. In the new row, from the **Place and Mode** list, select the encounter place and mode for which the facility is used.
5. In the **Description** field, enter the name of the new facility.
6. Click **Save**.

Results

The facility is now available for use in an appointment session template. For more information, see Appointment Session Templates *(on page 8)*.

Appointment Requirements

Requirements are services or objects that may be needed for particular patient appointments and services, such as Fasting Bloods, Test Results, Transport, X-Rays.

When an appointment is booked all defined requirements are listed with a comment. Those making the booking can select the requirements that apply and add a comment about each requirement. For example, add a comment of `Knock on back door` to **Transport**.

When a service is created or edited if a requirement is selected, the Requirements icon is displayed in the **Service Recording** window. The **Requirements** tab at the bottom of the **Service Recording** window shows the requirements details for the selected patient.

Note: If used in conjunction with the **Transport Management** module, selecting the **Transport** requirement creates a transport booking assumed to be from the patient's home address, to the place of the appointment with a drop-off time of the time of the appointment. Deselecting the **Transport** requirement does not cancel the booking. Instead cancel the booking from **Transport Management**.

Appointment Session Type

An appointment session type defines attributes that are common to a class of Appointment Sessions *(on page 12)*. Every session has a type.

The session type defines:

- The name (description) of the session, e.g. "Antenatal Clinic". Names are case-sensitive.
- The Session Booking Type.
- Whether walk-in patients are allowed.
- Appointment horizon days to override the system defined value (optional). The maximum value allowed is 373 days.

To define appointment session types, select **File > Appointments > Session Types**.

Public Holidays

Public holidays identify normal working days (or part days) that the practice will be closed.

Before you begin

Appointments are not generated for the period that the practice is closed. Sessions are not added to the Appointment Book automatically and manual sessions cannot be added.

Public holidays are also used in the calculation of normal working hours for some reports.

By default, the start date and time of the holiday is the first minute of the selected date and the end date and time defaults to the last minute of the end date. Typically this is the same as the start date, that is, most holidays are full, single days.

About this task

As long as your site does not routinely see patients on public holidays, enter national and state public holidays for the new year as early as possible, and before the default horizon days have automatically added sessions to the Appointment Book. If they are observed at your site, also include cultural holidays such as NAIDOC Week, or site-specific holidays such as Staff Picnic Day.

Note: A public holiday cannot be entered for a period in which appointment sessions already exist, except for cancelled sessions. If you attempt to create a holiday where sessions exist an error message is displayed.

Procedure

To add a public holiday to the appointment book:

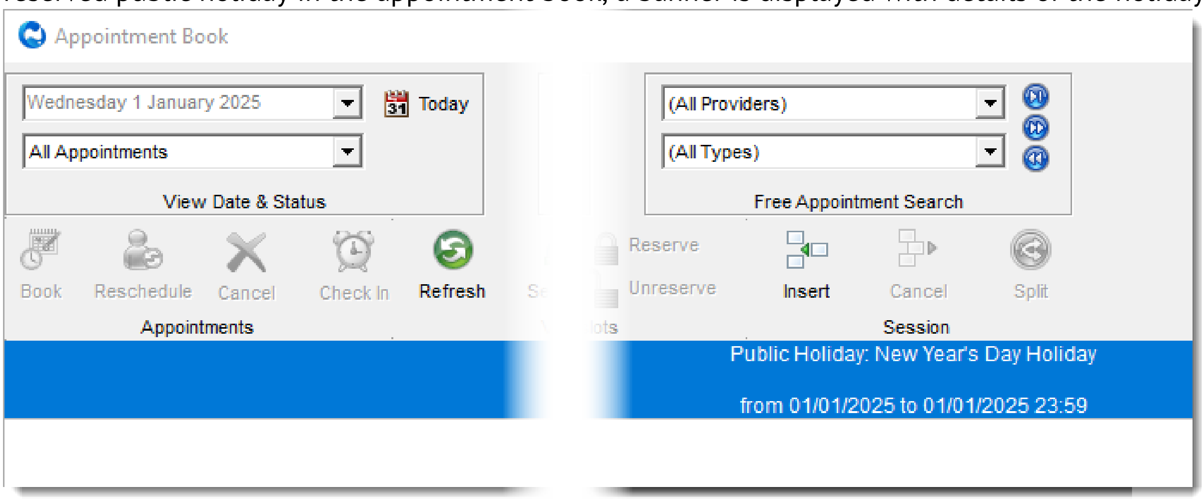
1. Select **File > Appointments > Public Holidays**.
2. In the **Public Holiday Maintenance** window, click Add.

   Tip: You can position the mouse anywhere; holidays are sorted by date after they have been saved.

3. In the row added, enter the name of the holiday and the start and end date.
4. Repeat steps 2-3 to continue adding holidays for the whole year.
5. Click **Save**.
6. Restart Communicare.

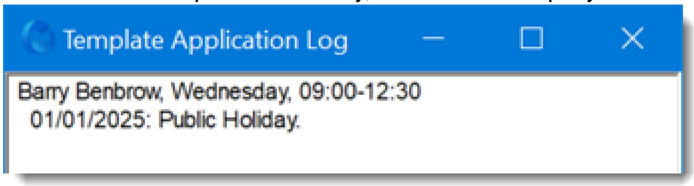
Results

The public holidays are reserved in the appointment book. When you go to the date of the reserved public holiday in the appointment book, a banner is displayed with details of the holiday.



What to do next

You can now insert new sessions into your appointment book. If you attempt to insert sessions into a reserved public holiday, an error is displayed in the Template Application Log.



Provider Planned Absences

Record planned provider absences such as holidays to block dates from the appointment book.

Before you begin

For days when all providers are away, set holidays for the whole practice. For more information, see Public holidays *(on page 6)*.

About this task

The daily process service will not organise appointments for a provider for these dates.

Procedure

To record a planned provider absence:

1. Reschedule any existing appointments that have already been booked during the planned period of absence.
2. Manually cancel any sessions that exist during the period of absence:
   a. In the **Appointment Book**, right-click the session and select **Cancel Session**.
   b. In the **Session Cancellation** window, enter `SESSION`.
   c. Click **OK**.
3. Select **File > Appointments > Provider Planned Absences**.
4. In the **Provider Planned Absences Maintenance** window, click ✚Add.
5. From the **Provider** list, select the provider's name from the list.
6. Enter a start and end date for the period of absence.
7. Click **Save**.

Appointment Session Templates

Appointment Session Templates identify when appointments can be made, in a general way. They are used as a template for creating the sessions into which appointments are actually booked.

Before you begin

Before you can add a session template, the following details must be configured in Communicare:

- Providers, select **File > Providers**
- Rooms and facilities, select **File > Appointments > Appointment Facilities**
- Session types, select **File > Appointments > Session Types**

You should also complete the Appointment Template Worksheet for each provider for whom you want to schedule appointments. To display the worksheet, select **Help > Forms > New Appointment Template Worksheet**. Download or print the worksheet as required.

Procedure

To create a new appointment session template:

1. Select **File > Appointments > Session Templates**.

2. To filter the existing session templates by provider, in the **Session Template** window, from the **Provider** list, select the provider whose session templates you want to work with.

   To display all session templates again, delete the provider or select `All Providers`.

3. In the **Session Templates** window, click ✚Add.

4. Alternatively, clone a session template: right-click the template you want to clone and select **Clone Selected Item**.
   A duplicate template is created, which is identical but is not enabled.

5. From the **Provider** list, select the provider you are creating templates for. You cannot include a provider in more than one session simultaneously, that is provider overlaps are not allowed.

6. From the **Facility** list, select the room you want to assign to the provider.

7. If you want to allow the room booking to overlap with bookings in other templates, set **Allow Facilities Overlap**.

8. If you want to limit this booking to a program, from the **Session Program** list, select a program.

9. From the **Session Type** list, select a session type. The session type defines whether walk-ins are allowed and may provide a default number of horizon days, which can differ from the system defined default.

10. From the **Day of Week** list, select one of the following options:
    - Manual - the template is not used to automatically generate sessions. Manual sessions can be inserted manually into the appointment book for any day of the week provided no Provider or Facility conflicts exist.
    - Sunday, Monday, Tuesday, ... - the template can be used to automatically create sessions on a repeating basis. For example, every Monday, every second Monday, every third Monday and so on.

11. If you selected a day of the week, in the **Recurrence Pattern** section:
    a. From the **Repeat Value** list, select how often you would like this session to repeat.
    b. From the **Effective date** calendar, select the earliest date that the appointments generated from this template can be made. If no date is entered, the current date is used. If the sessions are fortnightly or further apart, ensure that you set this date correctly for the first occurrence.

c. In the **Horizon days** field, enter the number of days into the future to automatically create sessions. The number in brackets indicates the value that will be used if nothing is entered here. The maximum value allowed is 373 days.
d. The **Horizon date** displays last time appointments generated up to and including this date. Next time generation will start from the next day.

> **Tip:** If sessions have been cancelled for the period between today and the Horizon date, you can force the overnight process to recreate them by resetting the date. The effect is that it will commence from 'today' instead of the day after the last run.

12. In the **Start Time** field, enter a start time for the session.

13. In the **End Time** field, enter a finish time for the session.

14. For session types that allow walk-in appointments, in the **Last Walkin** field, enter the number of minutes before the end of the session that walk-in patients will be accepted into the session.

15. Click **Save**.

Results

After adding a session template, a Timeslot Template *(on page 18)* is created automatically and the Timeslot Template *(on page 18)* window is displayed. Click **Save** to save the timeslots and enable the session template.

The nightly Communicare process will generate new appointment sessions based on the information entered in the **Recurrence Pattern** section and add them to the appointment book. If there is no last Horizon Date, new appointment sessions are created overnight, up to the default Horizon Date.

If there are missing sessions or you want the appointments generated immediately, right-click on the enabled session template and select **Apply to appointments book**. For more information, see Apply Appointment Session Templates *(on page 11)*.

The session duration and end time are reduced if necessary so that session duration is an integer multiple of default timeslot duration.

Edit Appointment Session Templates

You can edit a session template if required.

About this task

When editing templates, changes will only be reflected in the appointments book after the last Horizon Date.

To update current sessions, first cancel them. For more information, see Edit Appointment Session Templates After Insertion *(on page 11)*

Procedure

To edit a session template:

1. Select **File > Appointments > Session Templates**.
2. In the **Session Templates** window, double-click the template you want to edit.
3. In the **Confirmation** window, click **Yes** to confirm that you want to disable the template.
4. In the **Session Template** window, edit the required details. Start time and duration may not be edited. Instead, edit the Timeslot Template *(on page 18)* to change end time and duration of a session template.
5. Set **Enabled**.
6. Click **Save**.

Edit Appointment Session Templates After Insertion

Edit a session template after the sessions have been generated and inserted into the appointment book and then reinsert them into the appointment book.

Procedure

1. Cancel the sessions you want to change, all the way to the horizon. Add cancelled appointments to the reschedule queue and print the cancellation reports.
2. Edit the session template and timeslots.
3. Enable the session template again.
4. Right-click on the session template and select **Apply to appointments book** and accept the default date range.

What to do next

Examine the appointments book to confirm that the desired change has occurred.

Use the cancellation reports and reschedule queue to book any cancelled appointments again. Be sure to advise patients if any appointment times have changed.

Apply Appointment Session Templates

You can force Communicare to generate appointment timeslots in the appointment book according to the details of the template, rather than waiting for the nightly process.

Procedure

To generate appointment timeslots:

1. Select **File > Appointments > Session Templates**.
2. In the **Session Templates** window, right-click the template that you want to apply and select **Apply to appointments book**.
3. In the **Select Date Range** window, from the **From** calendar, select when you want to apply the session template from.
4. From the **To** calendar, select the Appointment Horizon date. This option is only enabled if the horizon date is set (indicating that the Appointments Generator has previously run).
5. Click **OK**.

Results

The selected template is used to generate appointment timeslots in the appointment book according to the details of the template.

Tip: In the appointment book, click **Refresh** to see the newly applied sessions.

Any sessions that would overlap with existing session providers or facilities are skipped.

The outcome is displayed in the Template Application Log. For example, "`The number of inserted sessions is 26`".

Details of all skipped sessions are also listed with the reason the session was skipped. For example, "`Provider overlap`".

Delete Appointment Session Templates

If an appointment session template is no longer useful, you can deactivate it.

About this task

Session templates are deactivated rather than deleted.

Procedure

To deactivate a session template:

1. Select **File > Appointments > Session Templates**.
2. In the **Session Templates** window, select the template you want to disable.
3. Click Delete.
4. In the **Warning** window, click **OK**.

Appointment Encounter Program

Assigning an encounter program to the appointment template ensures that all future sessions generated will have the same encounter program.

This allows filtering of appointment sessions when they are of a sensitive nature, such as sexual health, as users will only be able to view the session in the appointment book if they have the appropriate rights to the encounter program.

Appointment Sessions

An appointment session is the period of time for which a Provider and Facility are allocated to provide services. Sessions are normally divided into timeslots.

An appointment session has the following characteristics:

- Provider - who will provide service during the session.
- Appointment Facility
- Appointment Session Type
- Start Time - when the session starts
- Duration - how long the session lasts
- Last Walkin - the number of minutes before the end of the session that walk-in patients will be accepted into the session
- Default Timeslot Duration - how long timeslots normally last.
- Appointment Session Status
- Encounter Program - restricts the visibility of the session to those with access to the assigned Encounter Program

Appointment Session Status

Session Status is used to indicate the condition of sessions and session templates.

The status may be one of the following:

- Normal - the session or template operates normally.
- On-Hold - the template is ignored by the system. Use this status when setting up new templates that are not yet finalised.
- Cancelled - the session and all of its timeslots have been cancelled.

Session Booking Type

Session booking types determine how appointments are scheduled and booked.

The session booking types are:

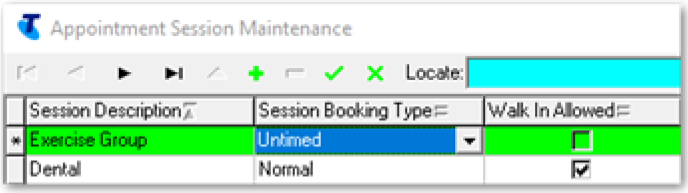
- Normal - appointments are made for this session in the usual way.
- Untimed - appointments can be made, but all appointments are given the same start time, which is the start time of the session. This is useful when a number of patients are to be seen for the same thing and the duration is expected to be short. For example, influenza immunisations and antenatal clinics.
- Walk-in Only - appointments cannot be made for this session, it is kept free for walk-in patients only.

Example group session

This session type is for scenarios where patients are all asked to turn up at the same time and are then seen one after the other, for example for influenza immunisations.

However it can also be used to create a fixed length group session into which you can book multiple people. For example, a daily session for an exercise group with a maximum of 10 people.

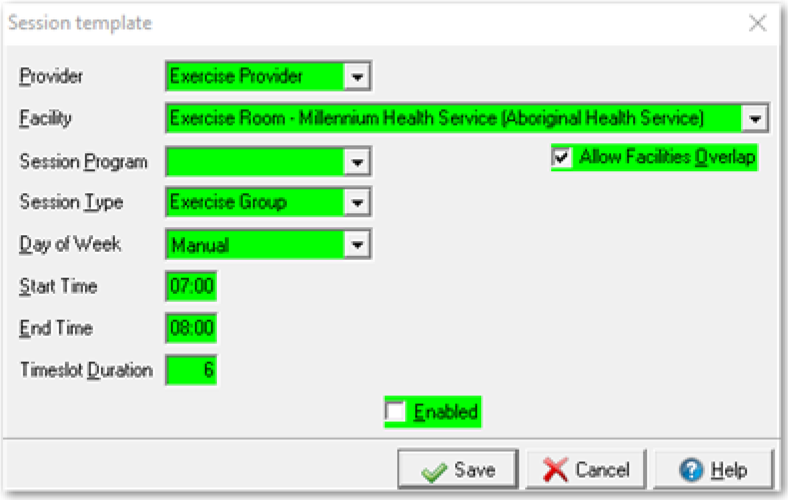
1. If you don't already have one, set a facility:
    a. Select **File > Reference Tables > Appointment Facilities**.
    b. In the **Facility Maintenance** window, click Add and enter the following information:
        - **Place and Mode** - `Millenium Health Service`
        - **Description** - `Exercise Room`
    c. Click **Save**.
2. Add the group session type:
    a. Select **File > Appointments > Session Types**.
    b. In the **Appointment Session Maintenance** window, click Add.



    c. In the new row, in the **Session Description** column, enter `Exercise Group`. This description is displayed in each timeslot when you add the session to the appointment book.

d. From the **Session Booking Type** list, select `Untimed`. All appointments are given the same start time.
e. Click **Save**.

3. Add the session template:
   a. Select **File > Appointments > Session Templates**.
   b. In the **Session template** window, from the **Provider** list, select who will be conducting the exercise session.
   c. Click ✚Add.

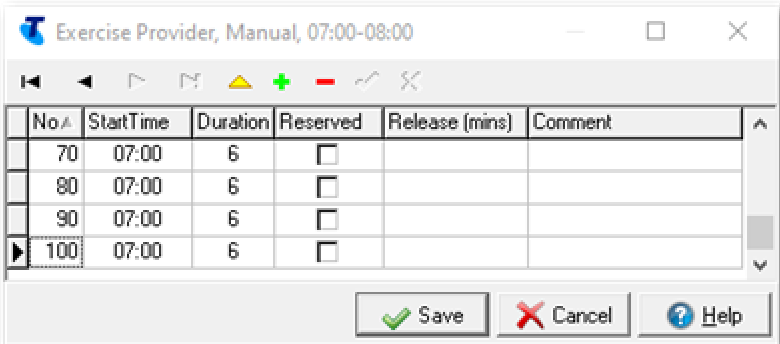


   d. In the **Session template** window, from the **Facility** list, select the facility specified in step 1, `Exercise Room`.
   e. If you want more than one appointment provider in the same room at the same time, set **Allow Facilities Overlap**.
   f. From the **Session Type** list, select the session type specified in step 2, `Exercise Group`.
   g. Enter a start time, end time and timeslot duration.

Note: Restrict the session length by setting the duration according to the number of participants in the session: divide the length of the session by the number of particpants. For example, for a 60 minute session, set **Timeslot Duration** to 6 minutes for 10 people, 5 minutes for 12 people and so on.

   h. Click **Save**.

4. Add the timeslots:
   a. In the Appointment Timeslot template window, add the number of timeslots available, either press cursor down or click ✚Add and enter `20`.



b. Repeat 8 times, incrementing the number. All appointments have the same start time and duration.
c. Click **Save**.
5. Enable the session template:
    a. Double-click the session template you've been working with (specified in step 4).
    b. Set **Enabled**.
    c. Click **Save**.

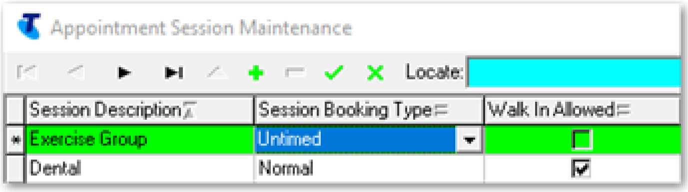
If the session is a weekly repeating session it is added to the appointment book automatically.

Example group session

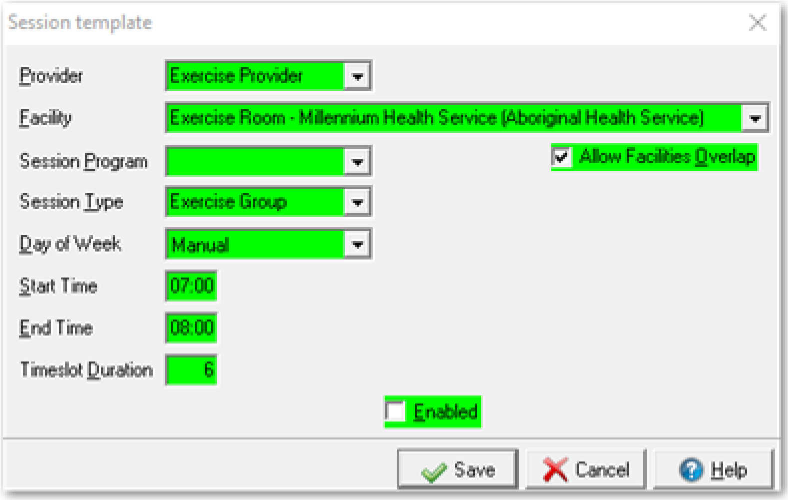
This session type is for scenarios where patients are all asked to turn up at the same time and are then seen one after the other, for example for influenza immunisations.

However it can also be used to create a fixed length group session into which you can book multiple people. For example, a daily session for an exercise group with a maximum of 10 people.

1. If you don't already have one, set a facility:
    a. Select **File > Reference Tables > Appointment Facilities**.
    b. In the **Facility Maintenance** window, click Add and enter the following information:
        - **Place and Mode** - `Millenium Health Service`
        - **Description** - `Exercise Room`
    c. Click **Save**.
2. Add the group session type:
    a. Select **File > Appointments > Session Types**.
    b. In the **Appointment Session Maintenance** window, click Add.



    c. In the new row, in the **Session Description** column, enter `Exercise Group`. This description is displayed in each timeslot when you add the session to the appointment book.
    d. From the **Session Booking Type** list, select `Untimed`. All appointments are given the same start time.
    e. Click **Save**.
3. Add the session template:
    a. Select **File > Appointments > Session Templates**.
    b. In the **Session template** window, from the **Provider** list, select who will be conducting the exercise session.
    c. Click Add.

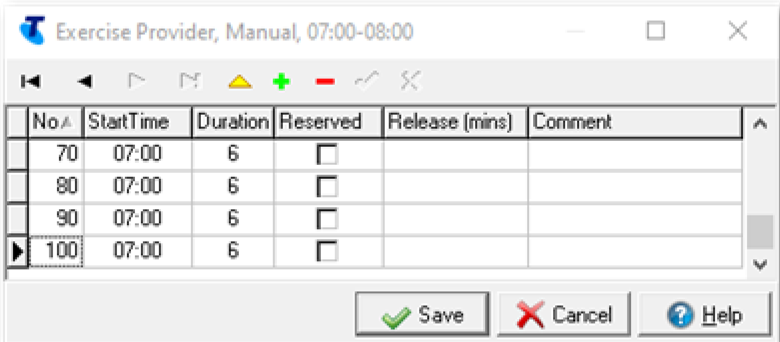


d. In the **Session template** window, from the **Facility** list, select the facility specified in step 1, `Exercise Room`.
e. If you want more than one appointment provider in the same room at the same time, set **Allow Facilities Overlap**.
f. From the **Session Type** list, select the session type specified in step 2, `Exercise Group`.
g. Enter a start time, end time and timeslot duration.

Note: Restrict the session length by setting the duration according to the number of participants in the session: divide the length of the session by the number of particpants. For example, for a 60 minute session, set **Timeslot Duration** to 6 minutes for 10 people, 5 minutes for 12 people and so on.

h. Click **Save**.

4. Add the timeslots:
a. In the Appointment Timeslot template window, add the number of timeslots available, either press cursor down or click Add and enter `20`.

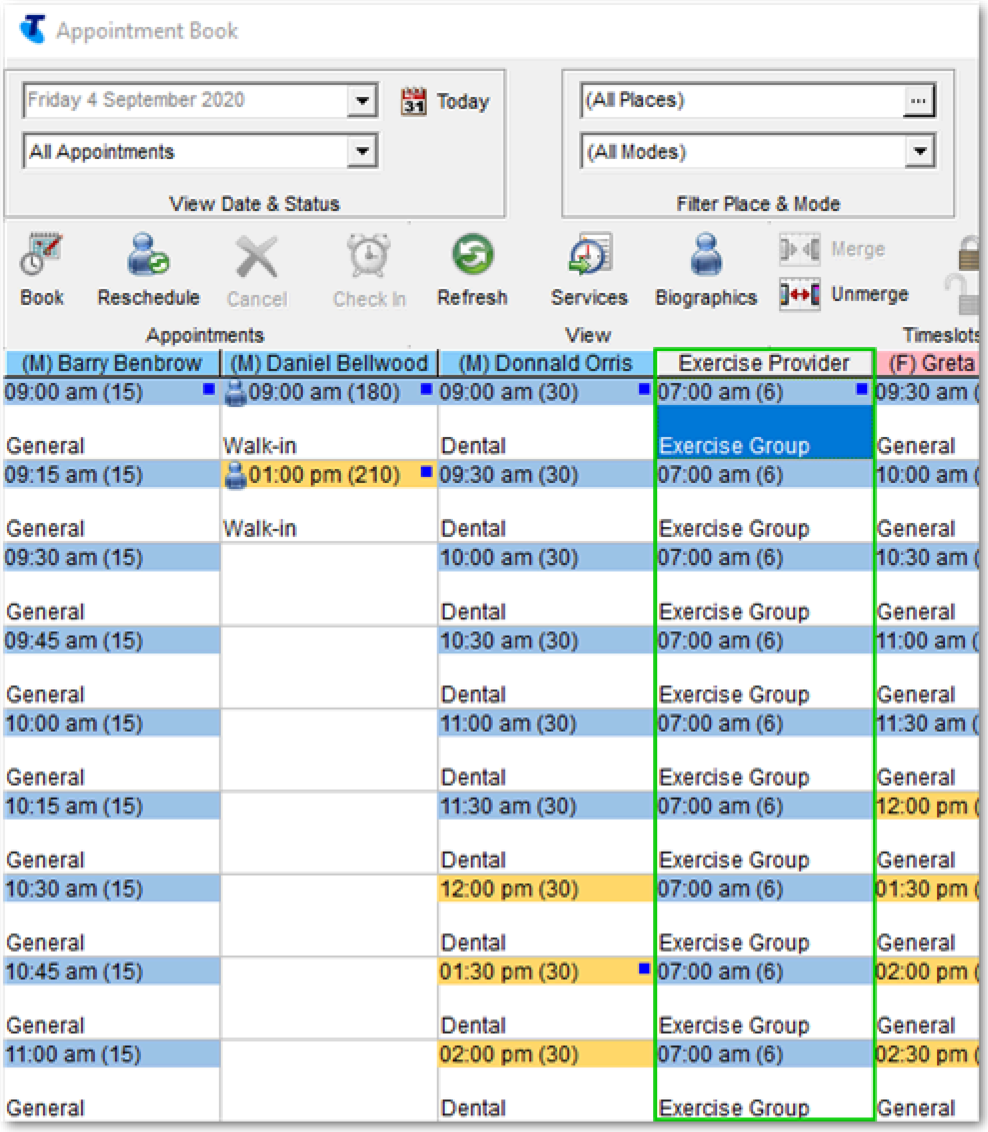


b. Repeat 8 times, incrementing the number. All appointments have the same start time and duration.
c. Click **Save**.

5. Enable the session template:
a. Double-click the session template you've been working with (specified in step 4).
b. Set **Enabled**.
c. Click **Save**.

If the session is a weekly repeating session it is added to the appointment book automatically.

To add a manual session, in the **Session Templates List**, select the provider specified in step 1, `Exercise Provider`. For more information, see Add Sessions to the Appointment Book *(on page 19)*.



You can now book a group of up to 10 people into a 7am exercise group, in the exercise room.

Appointment Timeslots

A timeslot is the period in which an appointment is booked. Timeslots can be of any duration.

Timeslots have the following characteristics:

- Number - controls the order of the timeslots within a session. Timeslot numbers are initially multiples of ten to facilitate easy insertion of new records.
- Start time - calculated by the system.
- Duration of the timeslot in minutes.

- Reserved - timeslots that cannot be booked. Reserved timeslots are useful for breaking up a session to allow some free time.
- Release - time in minutes before which the timeslot can not be booked. For example, a 10AM timeslot with a 120 minute release cannot be booked before 8AM. Use release times to ensure that sessions are not completely booked too far in advance.
- Merged - consecutive timeslots may be merged to create a longer appointment time.

Use the Edit Appointment Session Template Timeslots *(on page 18)* window to specify how the timeslots within an Appointment Session should be arranged.

Edit Appointment Session Template Timeslots

Edit the start time and duration of timeslots for a session template if required.

About this task

The Timeslot Template window:

- Displays the identity of the owning session at the top of the form, that is provider, day of week, start time, repeat start, repeat value.
- Displays details of each timeslot, including calculated starting time.
- As timeslots are added, deleted or changed the session end time is adjusted and displayed.
- Provider or facility overlaps are not allowed.
- Reserved timeslots are times intended for non-contact periods that cannot be booked. Set either a reserved timeslot or a release time, not both. Enter a comment for reserved appointment slots if required. Comments are displayed in the appointment book, but ignored if the slot is not reserved.
- If a release time is entered, the slot cannot be booked more than this number of minutes before it starts. Set either a reserved timeslot or a release time, not both.

Procedure

To edit timeslots:

1. Select **File > Appointments > Session Templates**.
2. In the **Session Templates** window, right-click the template whose timeslots you want to edit and select **TimeSlots**.
3. In the **Timeslots** window, edit the required start times and duration.
4. If required, to reserve a timeslot for administration or other requirements, set **Reserved**.
5. For regular timeslots, to make this timeslot available at a certain time, add the number of minutes before the timeslot starts that it becomes available.
6. Click **Save**.

Appointments

Use Communicare appointments to book future appointments and record services provided without an appointment, for example, walk-in patients.

Note: A standard activation fee applies. For more information, contact Communicare Support *(on page)*.

Before you can use the appointment book at your health service, it should be configured for your health service by your administrator. For more information, see Appointment Book Configuration *(on page 5)*.

View appointments by provider for a specific date, by all dates or just for today. This provides easy analysis of workloads over time, either by the practice or for an individual provider.

Once an appointment has commenced (patient arrival), it becomes a service record. If required, service records may be entered without an appointment to facilitate walk-in patients and other reporting requirements.

Working with the Appointment Book

Use the **Appointment Book** to add sessions, book and change appointments, and check patient's in.

Before you begin

To open the **Appointment Book**, in the main toolbar, click **Appointments Book**.

Add Sessions to the Appointment Book

Sessions with a type of *Weekly* are inserted automatically. As you open up booking days in the future, you may need to add new sessions into which you can book appointments, or you may need to add additional sessions at any time.

Before you begin

You can view only those appointment sessions created from templates with an Encounter Program to which you have access. Similarly, when adding Appointment sessions, only templates with Encounter Programs you have access to, or no Encounter Program specified, are available. For more information, see Appointment Session Templates *(on page 8)*.

About this task

You can insert a session with a type of *Manual* for any day. *Weekly* sessions can be inserted manually only for the day of the week for which they have been defined.

Procedure

To insert a session into the appointment book:

1. In the **Appointment Book**, click **Insert**.
2. In the **Session Templates List**, select the session you want to insert.
3. Click **OK**.

Results

The session is added to the **Appointment Book** unless it was not possible to insert the session because of overlaps between providers or facilities and so on.

What to do next

If there are errors in the **Template Application Log**, analyse the information and select a different session to insert.

Reserve Timeslots

If your provider needs time set aside without any patient bookings, that is not already included as a provider planned absence, or public holiday, reserve timeslots.

Procedure

To insert a session into the appointment book:

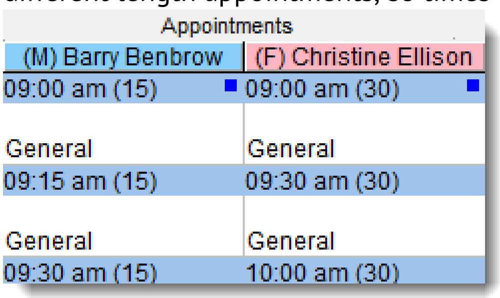
1. In the appointment book,, select a timeslot and click **Reserve**.
2. If the provider no longer needs this time set aside, select the reserved timeslot and click **Unreserve**.

Book Appointments

After you have configured your session templates and sessions have been inserted, either manually or automatically, you can book appointments.

About this task

The appointment book provides a one-day view. The sessions for a provider are listed in a single column. Each cell in the column is a single appointment timeslot. Different providers may have different length appointments, so times may not be aligned across the grid.



In this example, Dr Benbrow's appointments are 15 minutes long, while Dr Ellison's appointments are 30 minutes long. The time of the appointment and its length are displayed in the blue banner for each timeslot.

Tip: Appointment timeslots during public holidays and planned absences are not displayed. Instead, a single cell is displayed giving details of the holiday or absence so that you can see why no appointments are available and when a provider will be back from leave.

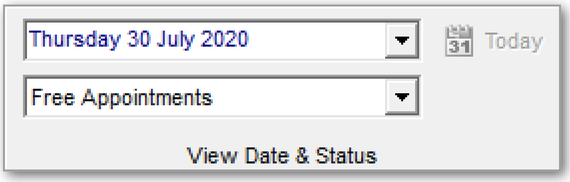
Procedure

To book an appointment:

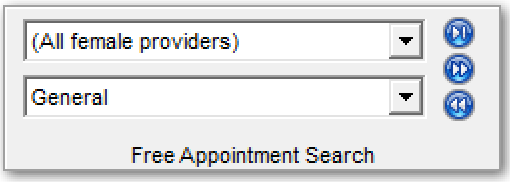
1. In the **Appointment Book**, if you have multiple sites, in the **Filter Place & Mode** pane, select a mode and place. This is important when multiple sites or separate waiting rooms are used. If you select an Administrative Encounter Place, appointments at all Service Encounter Places that belong to it are displayed.

2. If your health service books appointments from more than one workstation, to update your display to the latest appointment details, click **Refresh** or press F5.

3. Search for a free appointment slot:
   - To search for a free appointment for today or a specific day, in the **View Date & Status** pane, select **Free Appointments**. The Appointment Book displays only free appointment timeslots.

   - If there are no appointments available today, or for the selected date, to search for the next available appointment:
     a. In the **Free Appointment Search** pane, select which providers (all, female or male) and the type of appointment the patient requires.

     b. Click Play to go to the first day with available appointments.
     c. If there are no suitable appointments on that day, click Forward to go to the next day with available appointments or Back to go to a previous day with available appointments.

   Tip: To return to today's appointments, click **Today**.

4. If the patient requires a double appointment, select two adjacent timeslots and click **Merge**.

   Tip: If you later need to make this timeslot two single appointments again, select it and click **Unmerge**.

5. Select a free appointment timeslot and click **Book** or press CTRL+Enter.
6. In the **Select patient to book appointment** window (Patient search), enter the name of the patient for whom you're booking, select that patient in the list and click **Select Patient**.
   If you are booking for a new patient, first search for any existing record, then click **New Patient**.
7. The appointment is summarised in the **Appointment Details** window. Complete any extra booking information and click **Save**.
   For more information, see Appointment Details *(on page 22)*.

Results

The selected patient is booked into the appointment timeslot.

Appointment Details

When booking an appointment, after you have selected a timeslot and the patient, the **Appointment Details** window is displayed.

About this task

The patient's name and appointment information is displayed. You can't edit the appointment date or time here. Instead, click **Cancel** and move or reschedule the appointment.

Procedure

To complete appointment details:

1. If you need to view or update the patient's details, click Biographics.
2. If required, in the **Booking Comment** field, add booking information. This is displayed as a service message in the **Service Recording** window. For example, the urgency of the appointment.
3. If required, in the **Operator Initials** field, enter your initials. If no initials are entered, the login username is instead recorded. If initials are entered, both the login username and the initials are recorded.
4. If you want to make this a double appointment, set **Append next timeslot**. Communicare merges this timeslot with the next if it is available.
5. If required, from the **Appointment Type** list, select the type of appointment. If you are booking an appointment from the **Incoming Referral Details** window, you must select an appointment type.
6. In the **Booking Requirements** list, set any booking requirements and type any comments. When the Transport Management module is enabled, any Transport requirement is replaced with the Transport Management *(on page 6)* functionality. To add a transport requirement with the relevant information from the appointment booking, set **Transport Management**. To display the transport requirements for the patient, select the blue **Transport** link.
7. Click **Save**.

Edit Appointments or Sessions

Cancel appointment sessions, replace a session provider, or reschedule or cancel appointments.

Cancel and reschedule appointments manually

You can cancel or reschedule one or more patients' appointments in the **Appointment Book** at any time before the consultation starts.

Before you begin

In Communicare V21.1 and later, you can enable patients to reply to an SMS appointment reminder to confirm or reject the appointment. Patient replies are recorded in the **Appointment Book** and **Service Recording** windows. For more information, see SMS reply status *(on page 42)*.

About this task

To reschedule an appointment, you can either:

- Drag an appointment to a new timeslot, which cancels the original appointment
- Add a new appointment, then cancel the first appointment
- Queue the original appointment for rescheduling then add the rescheduled appointment. Using the reschedule queue allows the booking to be added to another session slot with the booking comments and requirements carried forward from the original booking. This is the best option if you want to cancel multiple appointments.

Procedure

To cancel appointments:

1. In the **Appointment Book**, select the appointment you want to cancel.
   To select multiple appointments, press SHIFT + click.
2. Click **Cancel** or press F2.
3. In the **Appointment Cancellation** window, from the **Reason** list, select the reason for cancellation.
   If you select **Queue for rescheduling**, the patient is added to the reschedule queue. If you selected multiple patients, this is the only option available.
4. In the **Comment** field, add any other information. For example, `Provider sick`.
5. Click **OK**.

Results

If you cancelled multiple appointments for rescheduling, a cancellation report is displayed. Print this out and use it to help ensure you reschedule all patients. The report cannot be printed later.

What to do next

If you queued the patients for rescheduling, you can now reschedule the appointments.

Rescheduling appointments

If you cancelled appointments and queued the patients for rescheduling, you can reschedule the appointments.

Before you begin

Booking comments and requirements are copied from the original booking.

Appointments are listed in the reschedule queue until the original date and time of the appointment has passed. After that date and time, these appointments are still stored in the database but are not listed in the reschedule queue.

About this task

To display a list of appointments that were not rescheduled before the original date and time of the appointment has passed for follow up with patients who may still require an appointment:

1. As an administrator, select **Reports > Appointments > Reschedule Queue Details**.
2. Set a start date of any past date.

Procedure

To reschedule appointments:

1. In the **Appointment Book**, select the next appropriate available appointment timeslot and click **Reschedule**, or right-click and select **Reschedule From Queue**.
2. In the **Appointment Reschedule Queue** window, select the patient who you want to add to this timeslot.
   Details from the cancelled appointment are copied to the new appointment.
3. Click **Select**.
4. In the **Appointment Details** window, add any required details and click **Save**.

Results

The appointment is booked with its original booking details and the cancelled appointment is removed from the reschedule queue.

Patients booked from the reschedule queue are no longer counted in the patient cancellation numbers. Those not rescheduled are included in the cancellation numbers with a reason of `Queue for rescheduling`.

Appointment Cancellation Reason

Use the **Appointment Cancellation Reason** window to indicate a broad reason category for an appointment cancellation.

Comments can also be added to give a more detailed reason if required.

These are the defined cancellation reasons:

- Did not attend
- Rescheduled

- Queue for rescheduling
- Cancelled by patient
- Cancelled by service

Cancel an Appointment Session

You can cancel a session or part of session if required.

Procedure

To cancel a session, or part of a session:

1. In the **Appointment Book**, reschedule any appointments. For more information, see Cancel and reschedule appointments manually *(on page 23)*.
2. If you are cancelling part of a session, select the first appointment you want to cancel and click **Split** and in the **Confirm** window, click **OK**.
3. In the **Appointment Book**, click in the part of the session or the session that you want to cancel and click **Cancel Session**.
4. In the **Session Cancellation** window, type `session` and click **OK**.

Results

The session or part of session is removed from the appointment book.

What to do next

If sessions have been cancelled for the period between today and the horizon date, you can force the overnight process to recreate them by resetting the date in the appointment session template. The effect is that it will commence from 'today' instead of the day after the last run.

Replace an Appointment Session Provider

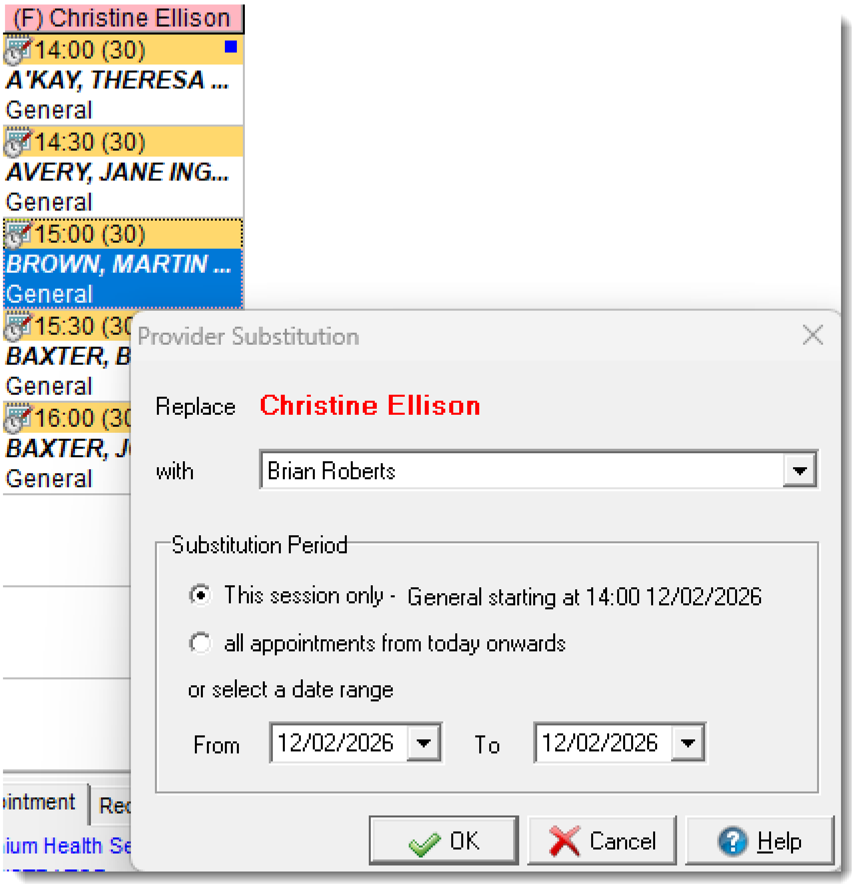
Replace a provider for a manual or weekly session, all appointments within a date range or all appointments from a selected date.

Procedure

To change an appointment session's provider:

1. In the **Appointment Book**, right-click in the session you want to reassign and select **Replace Provider**.

2. In the **Provider Substitution** window, from the **with** list, select an alternative provider.



3. In the **Substitution Period** list, select how many sessions you want to substitute. Choose from:
   - **This session only** - the provider is substituted for this session only.
   - **All appointments from today onwards** - the provider is substituted for this and all future sessions.
   - Date range - the provider is substituted for the selected date range.
4. Click **OK**.
5. Confirm the substitution.

Results

The selected provider is substituted for the original provider for the session or period specified, or until the horizon date if you selected **all appointments from today onwards**.

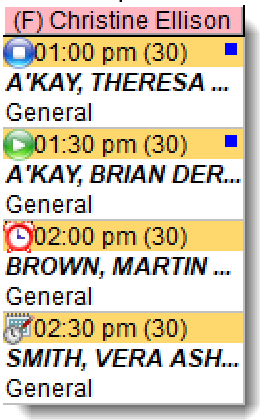
The session template is not affected by changes you make in the sessions; the provider for the session template is unchanged.

Checking a patient in

In the Appointment Book, you can manage an appointment's progress: you can check in a patient when they arrive for their appointment and then monitor the progress of that patient through your health service during their appointment.

About this task

For example in the Appointment Book:



- Vera's appointment is booked but she has not yet arrived
- Martin is checked in and is waiting
- Brian is seeing a provider (service in progress)
- Theresa has seen a provider and the service finished

Procedure

Having already booked an appointment, to check a patient in when they arrive:

1. In the appointment book, select the patient.
2. Click **Check In**.
3. In the **Service Record** window, the date and time of arrival are automatically listed. Record any other information as required, including setting the priority. For more information, see Service Record - Detail *(on page)*.
4. Click **Save**.

Results

The patient's status is changed to Waiting.

The other appointment status changes occur automatically when the service is started from the service record and the clinical record is closed.

What to do next

To open a patient's biographic information from the appointment book, select the patient's appointment and click **Biographics**.

To view a list of all upcoming appointments for a patient, click **Services** and search for the patient. Deselect **Future Only** to view all appointments.

To take payment when a service is finished and the patient returns to reception, in the **Service Recording** window, double-click a patient and select **Edit Service Details**.

Simultaneous Check-In

The **Simultaneous Check-In** window is displayed when checking in a patient who has more than one appointment today. It allows patients with multiple appointments to be efficiently managed through services with multiple providers.

Check-In

About this task

If patient has other bookings for the same Encounter Place, on the same day as the current record, when you check the patient in the **Simultaneous Check-In** window lists all appointments.

Procedure

To check the patient in for all appointments:

1. Select all appointments in the list.
2. Click **Save**.

Results

The arrival time for all selected bookings is set to that of the current record and the status of the patient is changed to *Waiting* for all appointments.

What to do next

The service for each appointment then starts and ends as normal.

Withdrawal

About this task

You may want to withdraw a patient from some or all appointments on the same day. For example, a patient has three services booked for morning and three for the afternoon. The patient leaves before completing all the morning appointments but will return for the afternoon appointments

Procedure

To withdraw the patient, for example, from the morning sessions:

1. In the **Service Record**, select the patient and click **Withdraw**.
2. In the **Service Record** window, click **Save**.
3. In the **Simultaneous Check-In** window, select all morning appointments for example, from which the patient is withdrawing.
4. Click **Save**.

Results

The patient is withdrawn from the selected appointments and any walk-in services at the same encounter place.

Walk-in patients

Walk-in patients are those who arrive without an appointment. That is, they just walk in.

Add these patients to the **Service Recording** window.

Adding walk-in patients to a service

Add walk-in patients to a walk-in session, or if this session is very busy, or you don't have a dedicated walk-in session, add walk-in patients to a general session.

About this task

Patients are listed in the **Service Recording** window in priority order. The priority is determined by:

1. Priority - where 1 is the highest priority and 3 is the lowest. Exact priorities are determined by your organisation:
    - By default, all walk-in patients for a dedicated walk-in only session are assigned a priority of 2.
    - By default, walk-in patients in a General service are assigned a priority of 3.
    - By default, booked patients are assigned a priority of 2.
2. Sequence date:
    - For a booking that hasn't yet started, the booked time
    - For a patient who has arrived, the arrived or check-in time. If your organsiation has a grace period set and the patient arrives late for their appointment, the priority for their appointment may be lowered.
    - For a service that has started, the start time
3. Encounter number: two services with the same priority and sequence date are listed in the order created

Tip: To apply basic triage to walk-in patients, ensure you set both the Priority and Service message when you enter a Service Recording. Develop standard service messages suitable for your encounter place.

Procedure

To add a walk-in service:

1. In the Service Recording *(on page)* window, click Add.
2. In the **Add Patient to Service Recording** window:
    a. In the **Patient Name** field, enter the patient's name.
    b. Select the required patient from the patient list.
    c. Click **Select Patient**.
3. In the **Session Selection** window, select the required session from the sessions available today at your encounter place and click **Select**.
   If a walk-in session isn't available, it has either not started or has not yet passed the last walk-in time available. The number of patients waiting for the session and the scheduled end time of the session are listed.

Tip: If you see a patient for an emergency on a public holiday or outside of hours when the practice is otherwise closed and there are no sessions available, click **Extra**. The encounter is recorded as a service of type `Extra` with no session. If you open a clinical record directly rather than from the **Service Recording** window, the encounter is always recorded as a service of type `Extra`.

4. In the **Service Record** window:
   a. In the **Providers** list, ensure that the Provider is correct.
   b. In the **Priority** list, select a priority for the patient. This determines the order in which patients will be seen if the provider is working from the top of the list.
   c. In the **Service message** field, enter supporting information for the priority. For example, `URGENT, head wound`.
   d. Check the other information for this patient.

5. Click **Save**.

Results

Patients are listed in the **Service Recording** window in priority order. Providers can use this list as a guide to determine in which order to see patients, and open patient clinical records from the list.

If you added the walk-in patient to a General session, they are added to the end of the bookings, unless you have changed their priority. If you changed the walk-in patient's priority to the same or higher than the booked patients (generally a priority of 2), they are added to the Service Recording list before the next booked patient.

If a selection is cancelled, you can record the service without a session, as an Extra service. Extra services do not have a provider or encounter place assigned automatically. Set or change these manually.

Patient Appointment and Service History

From the **Appointment Book** or clinical record, use the **Service List** window to view a list of all upcoming appointments for a patient, and a patient's appointment and service history.

To view a list of all upcoming appointments for a single patient, including cancelled appointments, click **Services** and search for the patient.

The **Service List** window is also displayed when an appointment is booked if the patient already has other appointments booked.

To view all appointments for the patient, including past appointments, deselect **Future Only**.

To book another appointment for the patient, click **Book Appointment**.

To print a reminder slip for the patient, click **Print all future appointments**.

Appointment Book report

Use the **Appointment Book** report to print the appointments book in a format that can be used in an emergency as a paper appointments book. It is also useful when reviewing the setup of the appointments book.

The visual layout of the report is similar to the appointment booking form, but is a list rather than a grid. One Provider is printed per page. Each cell of the report includes:

- Start Date/Time
- Duration
- Status
- Provider
- Appointment Session Type
- Facility
- Patient name
- Patient phone - this will be either the patient's Mobile Phone No, Home Phone No, or Work Phone No in that order. If the patient has no phone number recorded it will say `No Phone`.
- Booking comment
- Requirements

Cancelled sessions are automatically excluded from the report.

SMS Messages and Reminders

In Communicare V21.1 and later, you can send appointment reminders to patients using Telstra Health's SMS gateway (TH Messaging) and a new interface.

Note: A standard activation fee and additional charges apply. For more information, contact Communicare Support *(on page)*.

Send SMS messages or reminders directly to individual patients from their biographics or clinical record, or SMS multiple patients automatically or manually.

Patient Privacy

All sites using SMS must be aware of the current direct marketing and privacy laws.

- Users must opt in to receive SMS messages.
- Users can opt out at any time to stop receiving SMS messages.

  Tip: If patients do opt out, on **Patient Biographics > Personal** tab, from the **Preferred Contact** list, select `No Contact`.

- Ensure that you document and manage these requirements.

For more information, see Office of the Australian Information Commissioner.

Enable SMS

To configure Communicare to send SMS with Telstra Health's SMS gateway (TH Messaging), enable the module and assign system rights to user groups.

Before you begin

Telstra Health's SMS gateway (TH Messaging) does not store message content. It passes along the complete message details using software components on both the Telstra and Telstra Health networks. The Message ID, sending phone number and receiving phone number are the only data that is stored on the server.

About this task

Tip: You can continue to use the existing `SMS Feature` module until you exhaust your Burst credit. You should then swap over to the new SMS `Communications` module.

Procedure

To enable SMS:

1. Request the new SMS Communications feature from Communicare Support. They will send you the contract forms and after you return the signed forms, set up your TH Messaging account.
2. Enable the module:
    a. Select **File** > **System Parameters** > **System** tab.
    b. In the modules list, set **Communications**.
    c. Click **Save**.
    d. Contact Communicare Support for today's security code. In the **Enter Authority Code** window, enter the code and click **OK**.
3. Assign access rights:
    a. Select **File** > **User Groups**.
    b. In the **User Group Maintenance** window, select the user group that you want to allow to create and manage SMS appointment reminder templates.
    c. On the **System Rights** tab, set **SMS Administration**.
    d. In the **User Group Maintenance** window, select the user group that you want to allow to send SMS appointment reminders.
    e. On the **System Rights** tab, set **SMS Messaging**.
    f. Repeat steps a-e for all groups that will manage or use SMS appointment reminders.
    g. Click **Save**.

Results

After the `Communications` module is enabled:

- In the patient record and clinical record, when you click **Send SMS**, the `Communications` module is used.
- In the **Tools** menu:
    - **Send Bulk SMS** uses the `Communications` module
    - **Manage SMS Appointment Reminders** requires both `Communications` module and `SMS Administration` user right
    - All other SMS menu items that were previously available are hidden if `SMS Feature` is not enabled.

What to do next

Users with the `SMS Administration` user right can now set up the SMS appointment reminder templates *(on page 34)* for group SMS appointment reminders for your health service.

Send direct SMS messages

Send SMS messages to individual patients from their biographics or clinical record.

Before you begin

If you have the `Communications` module or the `SMS Feature` module enabled and your user group has the `SMS Messaging` system right, you can send a direct SMS message to a patient from their clinical record or their biographics.

Tip: An SMS cannot be sent to a patient if in the patient record, **Personal** tab:

- In the **Mobile Phone** field, there is no phone number listed
- **Patient has no phone** is set
- In the **Preferred Contact** field, `No contact` is selected

About this task

If both modules are enabled, the `Communications` module uses Telstra Health's SMS gateway (TH Messaging) to transmit SMS messages.

Remember: Do not send confidential or sensitive information using SMS.

Procedure

To send a direct SMS message to an individual patient:

1. In the clinical record or patient's biographics, click **Send SMS**.
2. In the **Send SMS Message** window, the patient's mobile phone number is displayed. The mobile number cannot be edited here.
3. In the **SMS Message** field, enter a message. The message is restricted to 320 characters.
4. Click **Send SMS**.

Results

A new `SMS Message` clinical item is created in the clinical record on the **Detail** tab.

The status of the SMS message is displayed in the **SMS Send Status** field, initially with a status of `Pending`. The SMS message is sent when the `CCareQueue_Communications` service next runs. The message status in the clinical item is updated automatically when confirmation is received that the message has been sent or has failed.

Restriction: You cannot delete the record of an SMS sent from Communicare, including from the **Detail** tab.

Send individual SMS using Burst

Procedure

To send an SMS message to an individual patient using Burst:

1. In the clinical record, click **Send SMS**.
2. If you have sufficient credit to send a message, the **Send SMS** window is displayed with the patient's mobile phone number. This cannot be edited from the **SMS** window.
3. In the **Message** field, type a message. The message is restricted to 160 characters.
4. Click **Send SMS**.

Results

A new `SMS Message` clinical item is created in the clinical record on the **Detail** tab. The **SMS Send Status** in the clinical item is updated automatically when confirmation is received that the message has been sent or has failed. If a phone number is invalid, the following message is displayed: `Send Failed (Phone number is not valid)`.

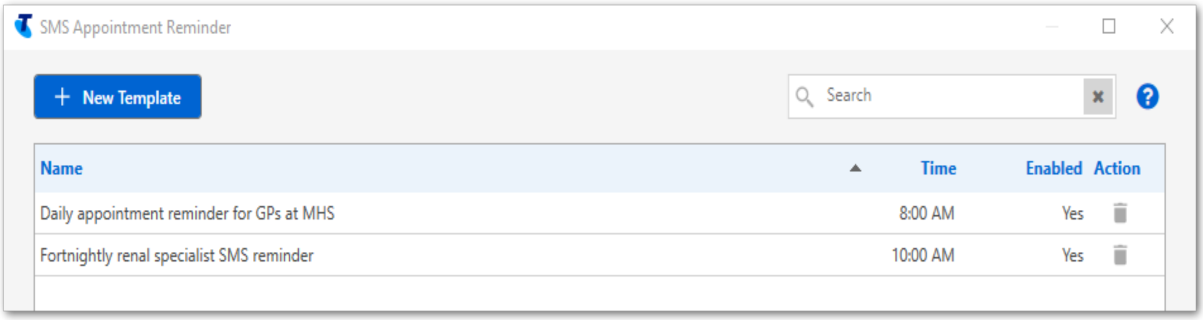
Restriction: You cannot delete the record of an SMS sent from Communicare, including from the **Detail** tab.

SMS reminder templates

Use SMS appointment reminder templates to compose and schedule the SMS messages that are sent to individual patients automatically, depending on appointments and other filters.

To set up and manage SMS reminder templates, the `Communications` module which uses Telstra Health's SMS gateway (TH Messaging), must be enabled and you must belong to a user group with the `SMS Administration` system right.

To display the **SMS Appointment Reminder** window, select **Tools > Manage SMS Appointment Reminders**.



The **SMS Appointment Reminder** window lists all SMS reminder runs that have been scheduled for your health service. The time at which the reminder is scheduled to run is also listed.

Tip: Before you create new templates, plan your templates to reduce the number of duplicate SMS messages sent to individual patients.

To search for a particular template, in the **Search** field, enter a word or phrase that appears in the template name.

To set up a new SMS reminder template, in the **SMS Appointment Reminder** window, click **New Template**. For more information, see Create SMS template *(on page 35)*.

To delete an SMS template that is no longer required:

1. In the **Action** column of the required template, click Delete template.
2. In the confirmation window, click **Yes**.

Create SMS template

Add an SMS appointment reminder template for each different appointment reminder and frequency that you want to send.

Before you begin

To set up and manage SMS reminder templates, the `Communications` module which uses Telstra Health's SMS gateway (TH Messaging), must be enabled and you must belong to a user group with the `SMS Administration` system right.

About this task

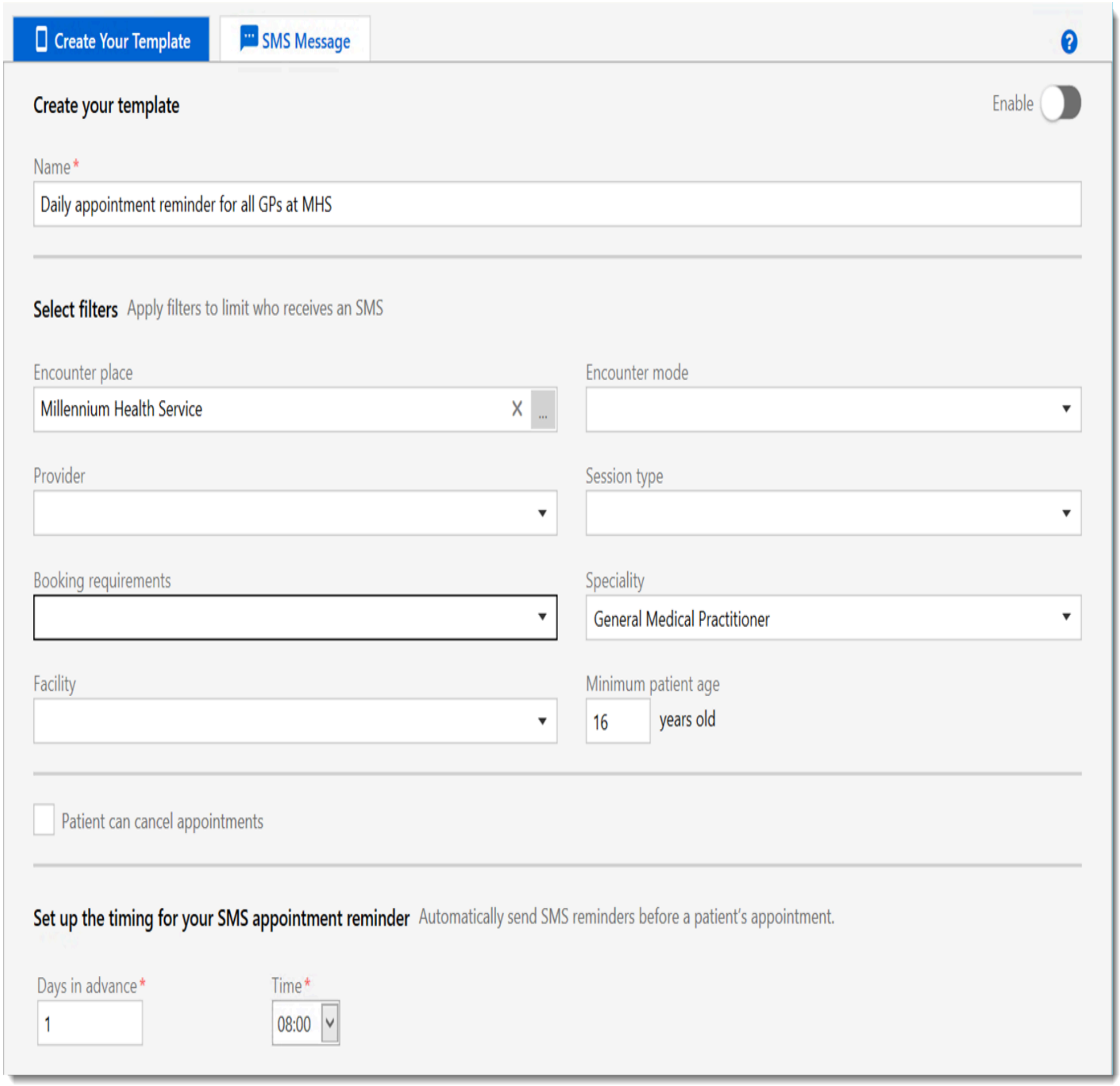
Reminders can be sent up to 28 days before a patient's appointment.

Procedure

To set up a new SMS reminder template:

1. Select **Tools > Manage SMS Appointment Reminders**.

2. In the **SMS Appointment Reminder** window, click **New Template**.



3. On the **Create Your Template** tab, in the **Name** field, enter a descriptive name for the template.

4. Optionally, add one or more filters to limit the recipients of the appointment reminder. Reminders are sent only for those appointments that meet all of the criteria you specify.
    - In the **Encounter place** field, click the ellipsis and in the **Select an Encounter Place** window, select the encounter place for which you want to send SMS appointment reminders and click **OK**.

      All enabled encounter places are listed. For grouped encounter places, if you select the parent encounter place, SMS appointment reminders are also sent to the dependent encounter places.
    - If you want to restrict the SMS reminder to appointments only assigned to a particular encounter mode, from the **Encounter mode** list, select that mode.
    - If you want to restrict the SMS reminder to appointments only for a particular provider, from the **Provider** list, select that provider. Only active providers are listed.
    - If you want to restrict the SMS reminder to appointments for patients only attending a particular session, from the **Session type** list, select that session.

- If you want to restrict the SMS reminder to appointments only with a particular booking requirement, from the **Booking requirements** list, select that requirement. Booking requirements *(on page 22)* are set in the appointment.
- If you want to restrict the SMS reminder to appointments only assigned to a particular speciality, from the **Speciality** list, select that speciality.
- If you want to restrict the SMS reminder to appointments for a particular facility, from the **Facility** list, select that facility.
- If you want to restrict the SMS reminder to patients of a particular age and older, in the **Minimum patient age** field, enter an age in years. All patients who are this age or older will receive an SMS appointment reminder.

5. To allow patients to cancel appointments automatically by replying `N` or `No` (by default) to the appointment reminder SMS message, set **Patient can cancel appointments**.

6. Set up the timing for your appointment reminder. By default, the reminder is scheduled for 8am, 1 day before the booked appointment.

   a. In the **Days in advance** field, set the number of days before the booked appointment that this reminder is sent.
   Reminders can be sent up to 28 days before a patient's appointment. If you do set a 28 day reminder, appointments scheduled for a time of day after the reminder is sent will not receive a reminder because they are more than 28 days in the future. Schedule the reminder to run at the end of the work day or use a 27 day reminder limit.

   b. In the **Time** field, enter the time at which you want the reminder to be sent.

7. On the **SMS Message** tab, in the **SMS Template** field, enter a message.
   For more information, see Compose SMS message *(on page 38)*.

8. On the **Create Your Template** tab, set **Enable**.

9. Click **Save**.

Results

Your new template is listed in the **SMS Appointment Reminder** window.

If you enabled the template, the template is run at the next scheduled time by `CCareQueue_Communications` and SMS messages are sent using Telstra Health's SMS gateway (TH Messaging), to all patients who meet the criteria specified in the template. The template does not consider any user, system or program rights.

Note: `CCareQueue_Communications` is run once daily at the time specified in the appointment reminder template. Any appointments booked after the appointment reminders have already been sent will not receive a reminder. For example, if *Daily appointment reminder* is run 1 day in advance at 8am, for any appointments booked after 8am on the day before the appointment, patients do not receive a reminder.

A new `SMS Message` clinical item is created in the clinical record of each recipient, on the **Detail** tab. The status of the SMS message is displayed in the **SMS Send Status** field, initially with a status of `Pending`. The SMS message is sent when the `CCareQueue_Communications` service next runs. The message status in the clinical item is updated automatically when confirmation is received that the message has been sent or has failed, or if the patient has replied.

Restriction: You cannot delete the record of an SMS sent from Communicare, including from the **Detail** tab.

What to do next

Patients can reply to their appointment reminder SMS.

- If you set **Patient can cancel appointments**, a negative response from a patient cancels their appointment. A confirmation of the appointment or no reply are indicated in the **Appointment Book** and **Service Recording** windows.
- If you did not set **Patient can cancel appointments**, replies from the patient are recorded in the **Appointment Book** and **Service Recording** windows. Cancel or reschedule appointments manually.
- Replies from the patient are recorded in their clinical record on the **Detail** tab.

Compose SMS message

Compose and preview the SMS message sent to patients when an SMS appointment reminder template is run.

Before you begin

To set up and manage SMS reminder templates, the `Communications` module must be enabled and you must belong to a user group with the `SMS Administration` system right.

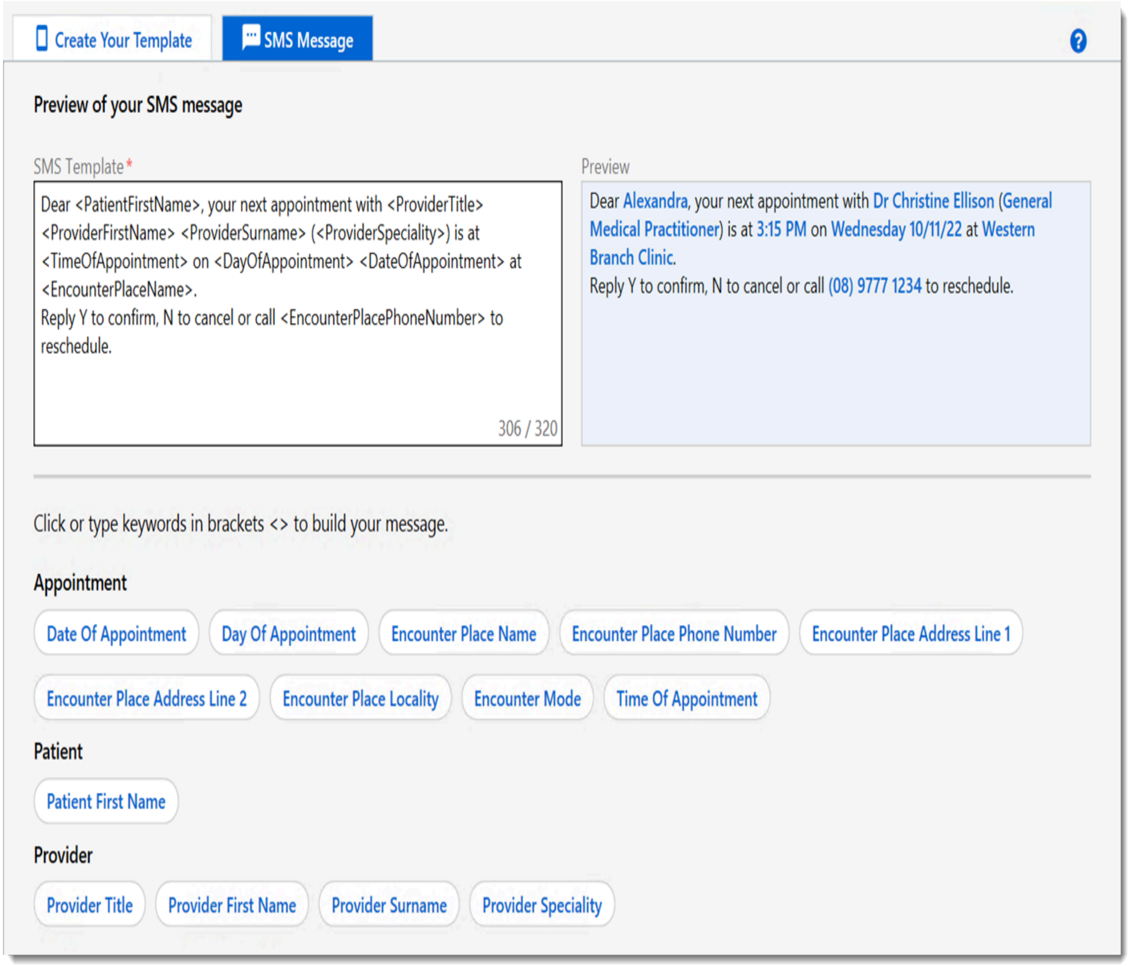
First, specify the scheduling details on the **Create Your Template** tab.

About this task

Procedure

To compose an SMS template message:

1. Select **Tools > Manage SMS Appointment Reminders**.
2. In the **SMS Appointment Reminder** window, click **New Template**.



3. On the **SMS Message** tab, in the **SMS Template** field, enter a message of up to 320 characters. Typically your message will be a combination of free text and keywords. Keywords are substituted with real details when the message is sent.

   Tip: To add a keyword, click the keyword you want, or type it in angle brackets < >. Keywords are case sensitive. Remember to add spaces around your keywords. If the keyword you type is incorrect, it won't be substituted with example text in the preview.

   The word count is a combination of free text and the text of each keyword and does not account for the text that will be substituted for the keywords. If you exceed 320 characters in the **SMS Template** field by adding a keyword, the count is highlighted in red.

4. Review the SMS message in the **Preview** field. The preview is updated as you type or add keywords and shows example text substituted for the keywords, highlighted in blue.

5. To check your template settings and enable the template, return to the **Create your template** tab. For more information, see Create SMS template *(on page 35)*.

Results

When the template is next run at the scheduled time, this message is sent to the patients who meet the criteria specified in the template.

Keywords are substituted with details from the patient record, the appointment book, the provider settings and the organisation settings.

Send bulk SMS messages manually

In Communicare V21.1 and later, you can manually send SMS messages to multiple recipients using Telstra Health's SMS gateway (TH Messaging).

Before you begin

The `Communications` module must be enabled and you must belong to a user group that has `SMS Messaging` system rights assigned.

About this task

To send messages to multiple recipients, Communicare first runs an SMS batch-specific report. Select from:

- **SMS Appointment Reminders** - shows all patients with appointments for a selected encounter place between two dates. To send reminders for a single day, enter that date in both the **First date to report** and the **Last date to report** fields. Appointments that have been cancelled or started are excluded.
- **SMS Patient Group Members** - shows all patients belonging to the selected patient group. Enter a message of up to 160 characters.

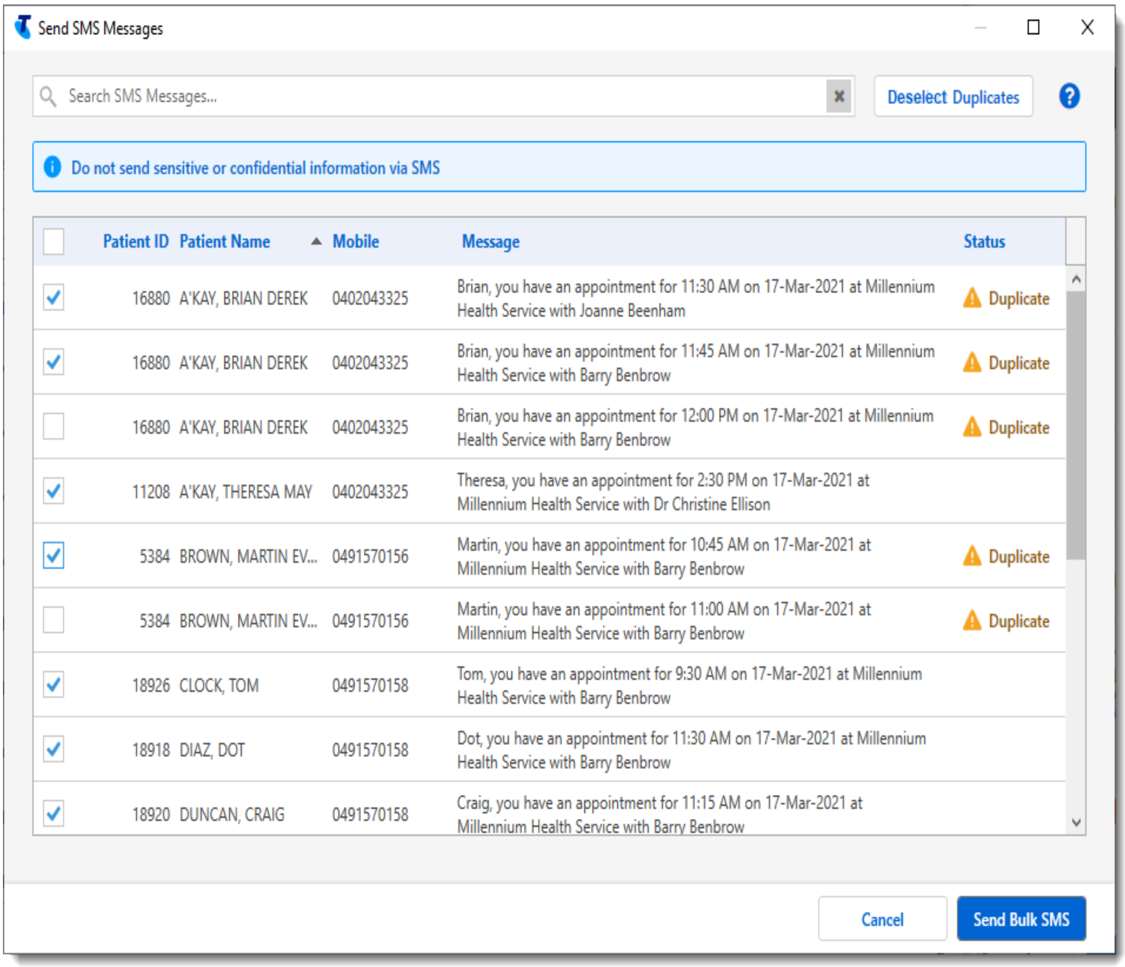
Only patients with a valid mobile phone number included in their record will receive the SMS. The following patients are excluded:

- Patients where **Preferred Contact** is set to `No Contact`.
- Deceased patients
- Fictitious patients

Procedure

To manually send SMS messages to multiple recipients:

1. Select **Tools > Send Bulk SMS**.
2. In the **Select an SMS query** window, select the required query, for example, **SMS Appointment Reminders**, and click **Preview SMS**.
3. In the confirmation window, click **Yes**.
4. Enter the required values in the fields for the selected report and click **OK**.
   For example, to send SMS appointment reminders for tomorrow, in the **Report Parameters** window, in the **First date to report** and the **Last date to report** fields, enter `tomorrow`. Limit SMS messages to patients with appointments at your encounter place or with a specific provider if required.
5. In the **Send SMS Messages** window, all patients who meet the search criteria are listed. Select all patients to whom you want to send an SMS.



Patients can be listed multiple times. For example, if they have multiple appointments at an encounter place with one provider or separate appointments with several providers. If there is potentially more than one SMS message for a patient, **Duplicate** is displayed in the **Status** column.

Tip:

- To select all patients, set the selection box in the heading.
- For a patient with duplicates, to automatically select only the first listed message, click **Deselect Duplicates**. If a patient has appointments with separate providers, only the first appointment for the day is selected. If you want to send multiple reminders, one for each provider, also select these messages in the list.
- To find a particular patient, in the **Search SMS Messages** field, enter the patient ID, name or phone number. Results are refined as you type.

6. Click **Send Bulk SMS**.

Results

A new `SMS Message` clinical item is created in the clinical record of each recipient, on the **Detail** tab. The status of the SMS message is displayed in the **SMS Send Status** field, initially with a status of `Pending`. If a phone number is invalid, the following message is displayed: `Send Failed (Phone number is not valid)`.

The SMS messages are sent when the `CCareQueue_Communications` service next runs. The message status in each clinical item is updated automatically when confirmation is received that the message has been sent or has failed.

Details of the SMS batch are displayed in the **Reports > SMS > Batch Report Details**.

Restriction: You cannot delete the record of an SMS sent from Communicare, including from the **Detail** tab.

SMS replies

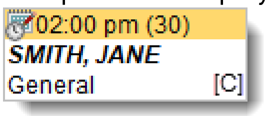
Patients can reply to an SMS and depending on the configuration of your system, confirm their appointment or cancel it automatically.

SMS reply status

If you use SMS appointment reminders, with Telstra Health's SMS gateway (TH Messaging), the status of SMS messages is recorded in the **Appointment Book** and **Service Recording**.

If patients can reply to the SMS, their response is recorded and changes the SMS status. If patients can automatically cancel an appointment, their booking is removed.

In the **Appointment Book**, the abbreviated status of the SMS replies for all patients are recorded in the timeslot for each appointment. When you select a timeslot, the status of the SMS reply for that patient is displayed on the **SMS appointment reminder** tab.



In the **Service Recording** window, the status of the SMS replies for all patients with an appointment are displayed in the **SMS Status** column. When you select a patient, the status of the SMS reply for that patient is displayed on the **SMS appointment reminder** tab.

Table 1. SMS reply statuses

Appointment Book	Service Recording	SMS appointment reminder tab	Description	Action
`[S]`	`Sent`	`Appointment Reminder SMS Sent`	An SMS appointment reminder for this appointment has been sent to the patient, but no reply has been received. If a patient replies with anything other than the expected response of `Y` or `Yes`, `N` or `No` (by default) or adds extra text, the status remains as `Sent`.	Depending on your processes, follow up with the patient or no action is required.
`[C]`	`Confirmed`	`Appointment Confirmation Received`	An SMS appointment reminder for this appointment has been sent to the patient, and the patient has replied with `Y` or `Yes` and confirmed the appointment.	No action is required.
`[R]`	`Rejected`	`Appointment Rejection Received`	An SMS appointment reminder for this appointment has been sent to the patient, and the patient has replied with `N` or `No` and declined the appointment.	Depending on your processes, either reschedule the appointment with or without patient input, or cancel the appointment. If automated appointment cancellation is enabled, the booking disappears. View the SMS status in the clinical record or **Report > SMS > Appointments Cancelled by SMS**
`[`*`blank`*`]`	*`blank`*	*`blank`*	No automated SMS was sent or the batch failed	

Note: Only the first response is received by Communicare. For example, if a patient replies `N` to an SMS reminder and then changes their mind and responds `Y`, the second response is ignored.

Tip: To view any previous statuses or replies, double-click **SMS Send Status**.

Clinical record

The patient's reply is also recorded in their clinical record. To display the reply, on the **Detail** tab, select the `SMS Message` clinical item. Details of the SMS are displayed in the **Qualifier** pane:

- **SMS Phone Number**
- **SMS Send Status** - when the patient has replied, displays `Replied (`*`reply from patient`*`)`, for example, `Replied (Yes)`. If the patient includes text other than the expected response, it is recorded here. Other statuses are:
  - `Pending` - the SMS has not yet been sent
  - `Sent Successfully`
  - `Send Failed` - the SMS was not sent and an error is displayed

SMS reports

Use **Report > SMS** reports to monitor SMS messages:

- **Appointments Cancelled by SMS** - lists appointments automatically cancelled
- **Batch Report Details** - lists patient and SMS details for a particular batch
- **Batch Report Summary** - lists numbers of SMS messages sent and whether they were successful

Appointments cancelled by SMS

If you are using automated SMS appointment reminders with Telstra Health's SMS gateway (TH Messaging), patients can automatically cancel their appointment by replying to an appointment reminder by SMS and rejecting the appointment.

If you aren't using automated SMS appointment reminders at your health service, but would like to, contact Telstra Health Support to find out how to activate it.

Patients who receive an SMS appointment reminder sent from Communicare because their appointment fits the criteria specified in an SMS appointment reminder template with **Patient can cancel appointments** set, can reply to the SMS and cancel an appointment up until the time that the appointment starts.

By default, patient's who reply `N` or `No` to the appointment reminder SMS message cancel their appointment. If patient's add other text, the appointment is not cancelled.

Tip: Add a line to your appointment reminder templates explaining to patients that they must only reply with `Yes` or `No` so that their responses can be recognised by Communicare. If you find that many of your patients reply with other responses, ask Telstra Health Support to also configure alternative confirmation or rejection responses.

If a patient receives multiple appointment reminders before replying, the latest appointment in the day for which the reminder is sent is cancelled.

Note: Only the first response is received by Communicare. For example, if a patient replies `N` to an SMS reminder and then changes their mind and responds `Y`, the second response is ignored.

When a negative SMS reply is received from a patient:

- A reason of `Cancelled by patient` is recorded and a cancellation comment of `Cancelled by SMS Reply` is added to the Service List
- The appointment is removed from the appointment book and service recording
- Linked incoming referrals are updated
- Transport management linked with that appointment is updated and the comment `Cancelled by patient` is added

To display a list of appointments cancelled by SMS, run **Report > SMS > Appointments Cancelled by SMS**.

SMS Batch Reports

You can add new local SMS batch reports to be used to send SMS messages to patients as required. Either request a new custom SMS batch report from Communicare or create it yourself.

Procedure

To request a new custom report:

1. In the Communicare User Portal - Help and Support tab, request support.

2. Provide the following information:

   ◦ Purpose of the report, for example, Recalls Due

   ◦ Additional filters required, for example, Recall type, date range (of appointment), patient age range, patient sex filter, Indigenous status, and so on

   ◦ Preferred name of report

   ◦ Output, the final SMS wording of no more than 320 characters

Results

When you receive the SMS batch report XML file from Communicare Support, import it into Communicare.

What to do next

To import the custom SMS batch report:

1. Select **Tools > Send Bulk SMS**.
2. In the **Select an SMS query** window, click **Import**.
3. Select the XML file on your computer and click **Open**.
4. Set **Public**.

The imported report is listed in the **Select an SMS query** window.

Tip: SMS Bulk reports do not show in the Communicare **Reports > SMS** menu, only in the **Tools > Send Bulk SMS** menu.

Creating a new SMS batch report

Procedure

To create a new local SMS report:

1. Select **Tools > Send Batch SMS**.
2. In the **Select an SMS query** window, right-click on a report and select **Copy and Edit SQL query**.
3. In the **Query Name** field, enter a name for report.
4. To prevent accidental use of the report while it is in draft, deselect **Public**.
5. If required, from the **Viewing Rights** list, select a viewing right. For example, `Maternal & Sexual Health`.
6. The `SMS Messaging` system right is required to run SMS batch reports. By default, `SMS Messaging` is assigned to the report. If any other system right is selected, from the **System Rights** list, select `SMS Messaging`.
7. Edit the SQL. You must include the following information:
    - An output attribute on the parameters set to XML, that is `<PARAMETERS OUTPUT="XML">`
    - The following output field names (use field aliases) in exactly the following order:
        - `PATID` - an integer field
        - `PATIENTNAME` - a string field
        - `MOBILENUMBER` - a string field
        - `TEXT` - a string field
8. To test your SQL, click **Preview Query**.
9. When you are satisfied with the SQL, set **Public** and click **Save**.

Results

You can now use the report to send a custom SMS batch.

System and viewing rights

About this task

To run SMS batch reports, users require the `SMS Messaging` system right.

When a report is run, the current user's viewing rights and program rights are respected in the output.

Important: To avoid unintentionally excluding some or all recalls, batch SMS Reminders for clinical procedures must be run by a user with the required viewing and program rights. Similarly, users running the report may have records excluded if their user group does not have the appropriate program rights.

For example, a user runs **Tools > Send Batch SMS >** *custom recall SMS batch*, then selects cervical screening recalls and the due date. If the user does not belong to a user group with the `Maternal & Sexual Health` viewing right, the output will not display any records.

SMS Messaging Using Burst

Set up SMS messaging so that your health service can send SMS messages to patients using Burst.

You can send messages to individuals or groups, including:

- Appointment reminders - `SMS Appointment Reminders` provides a standard reminder which is set by Communicare and cannot be edited
- Patient group messages - custom messages of no longer than 160 characters sent to patient groups
- SMS batch reports - if configured, use SMS batch reports to send SMS messages, for example, recalls

Note: Patients who do not have a mobile phone number in the **Mobile Phone** field in their patient record, or who have `No Contact` set in the **Preferred Contact** field are excluded from SMS messaging and report results.

Configuring Communicare to send SMS Messages

To configure Communicare to send SMS Messages:

1. Create a request to have Communicare Support configure Communicare and your SMS messaging account. You will receive an email with the SMS website login details. Support will enable the `SMS Feature` module in Communicare.
2. Allocate the `SMS Messaging` system right to the relevant user groups.

Adding credit to your SMS account

You must add credit to your SMS account before you can send any SMS messages.

To add credit to your account:

1. In Communicare, select **Tools > SMS Top-up**.
2. Log into the SMS account website using the account name and password details provided to you by Communicare Support.
3. Follow the directions and top up your SMS credit.

Sending Batch SMS Messages using Burst

An SMS can be sent to a list of patients using templates maintained by Communicare or custom, local SMS batch reports.

About this task

You can send SMS messages to multiple patients. Appointment reminder reports used with the `SMS Feature` module are distributed by Communicare. The `SMS Appointment Reminders` template is maintained by Communicare and is not editable.

Important: Do not send confidential or sensitive information using an SMS Message.

Procedure

To send SMS messages to multiple patients using Burst:

1. Ensure Communicare is configured for SMS messaging *(on page 47)*.
2. Select **Tools > Send Batch SMS - Burst**.
3. Select **SMS Appointment Reminders**.
4. Click **Preview SMS** and in the confirmation window, click **Yes**.
5. In the **Report Parameters** window, set values that limit who you send the SMS to. For example:
   - **First date to report** - tomorrow
   - **Last date to report** - tomorrow
   - **Appointment Place** - Millennium Health Service
   - **Provider** - Christine Ellison
6. Click **OK**.
7. The **Send SMS Messages** window lists the messages to be sent and the patient name and number. Review the messages to be sent and deselect any messages you do not want to send. Note the following:
   - The traffic light icon in the bottom left corner of the SMS Batch window shows you if you have enough credit to send the messages. The icon is:
     - Red if you do not have enough credit to send the messages. **Send SMS** is disabled. Click **Top-up Credit** to add more credit. See SMS messaging *(on page 47)* for more information.
     - Yellow if you do have enough credit but it is within 50 units of your current limit.
     - Green if you have credit for 50 more messages than you are about to send.
8. Click **Send SMS**.

Results

There is a delay between when a message is sent and when confirmation is received.

When the messages are sent, SMS Message clinical items are created for each patient who has been messaged. The Clinical Items can be found on the **Detail** tab of the Clinical Record and show the message, mobile number, date and time the message was sent, and the message status. The message status is one of the following:

- `Pending` - awaiting confirmation that the message was sent successfully
- `Sent Successfully` - the message was sent successfully
- `Send Failed` - the message failed to send and an error message is displayed

Restriction: You cannot delete the record of an SMS sent from Communicare, including from the **Detail** tab.

Sending SMS messages to group members

About this task

You can send custom SMS messages to members of a specific group, such as `Young Mothers Group`.

Important: Do not send confidential or sensitive information using an SMS message.

Procedure

To send SMS messages to group members:

1. Ensure Communicare is configured for SMS messaging *(on page 47)*).
2. Select **Tools > Send Batch SMS**.
3. Select **SMS Patient Group Members**.
4. Click **Preview SMS** and in the confirmation window, click **Yes**.
5. In the **Report Parameters** window:
    - In the **Message to send** field, enter your message to the group, up to 160 characters long
    - From the **Patient Group** list, select the group you want to message
6. Click **OK**.
7. The **Send SMS Messages** window lists the messages to be sent and the patient name and number. Review the messages to be sent and deselect any messages you do not want to send. Note the following:
    - Any messages that are longer than 160 characters are truncated to 160 characters. Hover your mouse over the message to see the message that will be sent.
    - The traffic light icon in the bottom left corner of the SMS Batch window shows you if you have enough credit to send the messages. This will be:
        - Red if you do not have enough credit to send the messages. **Send SMS** is disabled. Click **Top-up Credit** to add more credit. See SMS messaging *(on page 47)* for more information.
        - Yellow if you do have enough credit but it is within 50 units of your current limit.
        - Green if you have credit for 50 more messages than you are about to send.
8. Click **Send SMS**.

Results

There is a delay between when a message is sent and when confirmation is received.

When the messages are sent, SMS Message clinical items are created for each patient who has been messaged. The Clinical Items can be found on the **Detail** tab of the Clinical Record and show the message, mobile number, date and time the message was sent, and the message status. The message status is one of the following:

- `Pending` - awaiting confirmation that the message was sent successfully
- `Sent Successfully` - the message was sent successfully
- `Send Failed` - the message failed to send and an error message is displayed

Restriction: You cannot delete the record of an SMS sent from Communicare, including from the **Detail** tab.

Support

If you run into problems using Communicare, you can always get help from us.

For help and support, go the Communicare User Portal - Help and Support tab for general information and further links.

If you still need help, create a support request with Telstra Health Support and we'll get back to you.

Include as much information in the request as you can and follow these guidelines:

- If you include patient information, for patient confidentiality, use the Patient ID instead of the patient's name.
- If you include screenshots, ensure that you conceal both the patient's name and date-of-birth.

Fastpath: For urgent problems or issues with using the portal, call `1800 798 441` to speak to a support team member.

If reporting a problem, before contacting us, try to replicate the problem. It also helps to write down the problem and the circumstances under which it occurred.

Release Notes

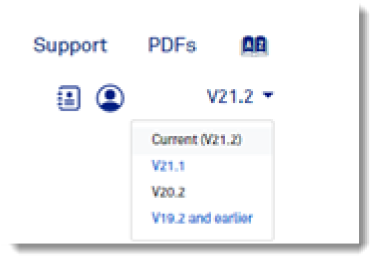
Release notes for all versions of Communicare are available on the Knowledge Centre.

To open the release notes for the latest version of Communicare:

1. On the Communicare User Portal > Help and Support https://communicare-portal.telstrahealth.com/help-and-support/ tab, in the **Knowledge Centre** tile, click **Learn More**.
2. In the Knowledge Centre https://communicare-portal.telstrahealth.com/knowledge/, from the main menu, select **Support > Release Notes >** *required release notes version*.

    Tip: Release notes for the latest version are listed first.

If you are using an older version of Communicare and want to refer to release notes for that version, the release notes are included with the latest version. However, to display the complete Knowledge Centre for your version of Communicare, in the Knowledge Centre, on the right side of the main menu, select your version of Communicare.



Quick links to release notes

- V23.1
- V22.4
- Older versions

Training

If you want someone to teach you how to use Communicare, from beginners to advanced users, try our training.

We can organise someone to come to you, or you can access our eLearning.

Tip: Check our eLearning site regularly for our invaluable *Tips and Tricks*.

Request Remote Assistance

Run Teamviewer for quick support or request remote assistance.

Requesting Remote Assistance will allow Telstra Health Support to have a live view of your screen so we can help you better.

To run remote assistance, when instructed by Telstra Health Support, in Communicare, select **Help > Request Remote Assistance**.

In order to invoke Request Remote Assistance, on your keyboard, press CTRL+F2.

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