



12<sup>th</sup> December 2016

## **HEALTH ENGINE PROCEDURE**

### **What is Health Engine?**

Health Engine is an Online booking system that allows your clinic to publish certain appointment times that can be booked by patients online.

Initially most clinics will have control and publish the appointment times that best suit the clinic. As we get more proficient then Health Engine does have the capability of scanning the books and publishing all available appointment times which will require less work for FOC.

### **How can patients book using Health Engine?**

Either they can use the Health Engine website or click the 'Book Now' link on our Facebook page or website that will direct them to book the appointment.

If the appointment is booked through Health Engine directly, then any new patient bookings into the clinic will be considered and marked as 'Referral' on the dashboard and we will be charged a \$49 once off New patient referral fee. If they book directly through our own website or via the FB page then we are not charged the referral fee.

### **How do I use Health Engine?**

This will require a marriage and constant check between EXACT and Health Engine. Initially the slots published by the FOC or PM so that we have full control over the system.

However, if a patient does in fact cancel their appointment then it will be in the best interest of the clinic to publish these times as they become available so the books remain full. Also, if we find that the clinic has been quieter in recent times then there will be more times that will be available and publicity is the best way to fill these.

**LOGIN DETAILS:** These will be specific for each clinic issued by Dara or Russell

1. **Creating Availability on Health Engine** (Each Monday, FOC/PM to look through Appointment book and publish 14 days ahead)

- Choose the date and time
- Create the Preset Slot
- Right click, insert, preset slot - select duration and "Health Engine"
- Copy and paste an existing slot.
- Duplicate this in Sidebar, navigate to that date.
- Click create appointment - Select Duration, practitioner, start time.

2. **Removing Availability from Health Engine**

- Navigate to that date and time in Sidebar and click the appointment to remove.

### **3. Accepting a booking**

- When a booking has been made, the practice will receive an email
- Sidebar will flash with a red box.
- Click show details to review the information
- In d4w navigate to date and time, delete the preset slot replace it with the patient.
- In sidebar, mark as complete, to finish.

### **4. When a Patient Fails to Attend**

*(This MUST be done daily and accurate before the last day of the month prior to being invoiced for the service)*

This must be done by the FOC who takes the phone call so that our records clearly indicate that the patient did not arrive for their appointment

- Go to practice admin (Home Button)
- Bookings Tab
- Click Patients name
- If they are a 'NEW AND REFERRAL', then they are a charged patient in which case you must change them to 'Did not Attend' otherwise we will be charged the \$49 referral fee
- Click the "did not attend / Cancelled" button (RHS)
- Complete the form, an orange "dna" tag will be applied to the patient.

### **IMPORTANT:**

\*\*If the patient is not NEW (and they are also marked as REFERRAL) then email [accounts@healthengine.com.au](mailto:accounts@healthengine.com.au). Otherwise we will be incorrectly charged \$49

### **What do I do with the Health Engine invoice that I receive?**

A service invoice will be received to the email address of the clinic each month with the monthly subscription as well as any 'New Patient Referral fees' with the patient names.

The PM will be responsible for checking whether the invoice is correct as a final check although daily checks of the dashboard should be done to ensure there are no nasty surprises (are the new patients new, did they actually turn up for their appointment?)

Once correct, please upload it to Evernote to be paid. If there are any errors, please email [accounts@healthengine.com.au](mailto:accounts@healthengine.com.au) so that they can resolve it straight away.