

How to Setup and Manage Clipboards

RxWorks





- Firstly, you need to be in the **clipboard** work area.
- You can configure any **individual clipboard** by right clicking on its name under a clipboard group and selecting **configure** from the menu.
- The Configuration Window will open.
- There are various aspects to this window.

- Name you can change the name of the clipboard which will be visible on the clipboard window.
- **Group** you can change the clipboard group the individual clipboard appears in on the clipboards list. Select an option from the corresponding drop-down.
- Navigate To you can choose the page which the program will navigate to after you complete an entry in the clipboard. Select an option from the corresponding drop down. For example, you might choose to navigate to the financial work area after selecting a client from a waiting to pay clipboard.

General	Navigate		Manage	Tasks
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		12:15		
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- Transfer To you can choose from the drop-down list which will then transfer patients once work has been completed in one clipboard. He used a system to move patients and clients through series of clipboards as they visit progresses. A sign of progression might be from arrived for consult to waiting to pay to follow up.
- Add click Add to add a new clipboard.
- **Copy** to copy the existing clipboard.
- **Delete** delete the existing clipboard. Note that all records will be permanently lost.

- **Columns Area** the left box contains all the available columns. The right box contains the columns that will show on the clipboard when an entry is added.
- Choose From: use this drop-down to show all available fields or just fields for Clients, Patients or Consultations.
- Select the column you want to move and use the arrows to move the columns. To adjust the order the columns display on the clipboard, you can use the Move Up and Move Down buttons.





General			OK	Cancel
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- Appointment Scheduler Checking this option will ensure the clipboard is shown when the clipboard group is selected and is available to make appointments.
- Set Duration When Adding This option is available only if
 Appointment Scheduler is not selected. It will prompt a time for any new entries into the clipboard.
- Delete Entry on Finalising Visit Selecting this will delete any reference of the entry from the clipboard once the associated visit has been finalised.
- Form(s) to print when adding entries – You can select documents to be automatically printed once an entry is entered on a clipboard.
- Click ... to the right of the field to open a new window.
- Select the document you wish to print from the drop-down and click **Add**.

• Advanced – Choose whether a new visit should be created when an entry is added to the clipboard.

	1. Arrived for Co	nsult (ID: 400)
General		
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Group	SA Activities 🗸 🗸	Set Duration When Adding
Navigate To	Patient Page 🗸 🗸	Delete Entry On Finalising Visit
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Save Configuration Consultation Workflow You can choose to automatically add a new consultation whenever an entry is added to this clipboard. Select the required option below: No Action Take no additional action when adding an entry to this clipboard. Add New Visit Without Prompting Add a new incomplete visit and consultation, and do not show any prompts. Add New Visit and Prompt for Consultation Add a new incomplete visit and consultation, and show the Add Consultation prompt. Prompt to Append to Existing Visit and Prompt for Consultation Prompt to append to an existing incomplete visit if any exist, and then show the Add Consultation prompt. Disallowed Actions You can disallow all users from performing the following actions to entries on this clipboard: Delete Transfer Move Copy Online Appointment Bookings	x
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Delete Transfer Move Copy Online Appointment Bookings	
Online Appointment Bookings	
If you have integrated with a third-party online appointment booking system then you can allow bookings to be made for this clipboard.	web
Allow Web Bookings	

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- The Advanced Clipboard Setup Window has several options.
- There are five different options regarding automatic new consultations. You can select the required one.
- **Disallowed Actions** This allows you to choose what access levels all staff have on that clipboard.
- If you have an integration with an online appointment booking system, you can tick this option to allow web bookings to be made on this clipboard.
- Click **Save Configuration** to save any changes.
- Click **OK** on the clipboard configuration window to save all changes.

• You can configure any **Clipboard group** by right-clicking on the name of the clipboard group and selecting **Configure** from the menu.



- The Clipboard Groups Configuration window will show.
- This allows you to set the **properties** of your clipboard group.
- The list in this window displays all the clipboard groups set up for your practice.
- Each clipboard group is listed in the order they are displayed on your clipboard work area.
- You can select a group from the list and then use the **Move Up** and **Move Down** buttons to change the position.
- Click **Add** if you want to add a new clipboard group.
- Note, only users with modify access can add new groups.

- If you wish to **edit** a clipboard group, select the group and select **Edit**.
- The lower area of the window will be accessible to edit the clipboard group.
- You can **Edit** the clipboard group's name.
- **Toggle** the **Auto Open** option. When selected, the clipboard group will

Clipboard Gr	oups 🗌	? X
Use this dialog to set the proper You may also add new ones or	ties of your clipboa change the display	ard groups. y order.
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Clipboard Groups	? X
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Puppy parties	
Move Up Move Down Appointment	Configuration
Group Name Evergreen Appts	Save
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automatically be expanded to show individual clipboards.

- If you have more than one branch, you can choose which clinics can view this clipboard group.
- Click Save to update any changes or Undo to cancel.
- **Delete –** If you want to delete a clipboard group, select it and then click **delete.**

- A window will show asking to you confirm by typing YES and clicking Delete.
- Appointment Configuration This will open the Appointment Properties window for the clipboard group.
- In the **Times** area, you can set a time frame for when appointments can be made.
- You can then choose the time slots duration.
- You can **Add**, **Edit** or **Delete** a time slot in the calendar.



Clipboard Groups	? X
Use this dialog to set the properties of your of You may also add new ones or change the	clipboard groups. display order.
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RiverHouse Appts	Edit
SA Appointments (Llinic 3) Surgery	Delete
SA Activities Out or Hours Bpt Prescriptions	Close
Staff Messages Financial	
Clinic Phone Book Puppy parties	
Move Up Move Down Appointmen	t Configuration







• Click **Customise** to customise the start and end times for **clipboard appointments**.

• You can also set the **default time** for appointment slots.

- In the Properties Area of the window you can configure whether to show appointment grid colours by user or appointment type.
- Click Configure Appointment Types, the corresponding window will open.
- You can add new appointment type descriptions, edit or delete existing appointment types.
- Click Add.

• Enter the details and duration for the new appointment type and set the

Appointment Properties for SA Activities ? Use this dialog to configure the appointment times and properties for this clipboard group. Times Ргор rties Show Appointment Grid Colours: v By User O By Appointment Type Configure Appointment Types... Add Edit Delete Customise 0<u>K</u> Cancel



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text and background colour to how you want it to appear on the clipboard.

- Click Save.
- If you want to **edit**, **deactivate** or **delete** an appointment type, click the description heading.

- In the pop-up window, you can **edit** the appointment type.
- Click Save.
- To **delete**, simply click **Delete** then confirm.

- To **deactivate** an appointment type, click on the **Deactivated** option in the pop-up window.
- Click Save.

Create New Appointment Type				
Description	Health Check			
Global Duration	15 mins			
Clinic Duration	15 mins			
Text Colour				
Back Colour				
Allow Web Booking				
Deactivated				
	Cancel Save			

Evergreen Veterinary Hospital

O. Consult 5 mins 5 mins O. Emergency 30 mins O. Intergency 30 mins I. Consult 10 mins 10 mins 2. Consult 15 mins 15 mins 3. Consult 30 mins 30 mins 4. Vaccination 10 mins 5. Euthanasia 20 mins 6. New Cleint 10 mins 7. Post Op Check 10 mins In Clinic Visit 30 mins Phone Call 5 mins Surgery 30 mins Surgery Neuter 30 mins Y Z Block Out 5 5 mins	Visible	Description	Duration
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Description	Health Check	>
Global Duration	15 mins	
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Description	Health Check	
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