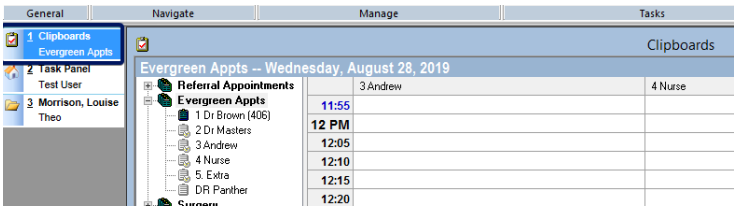
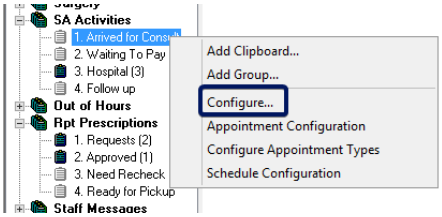
covetrus

How to Setup and Manage Clipboards

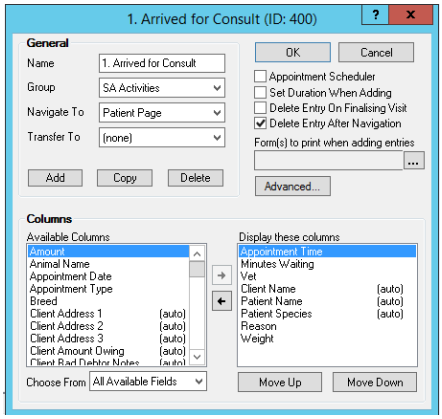
RxWorks



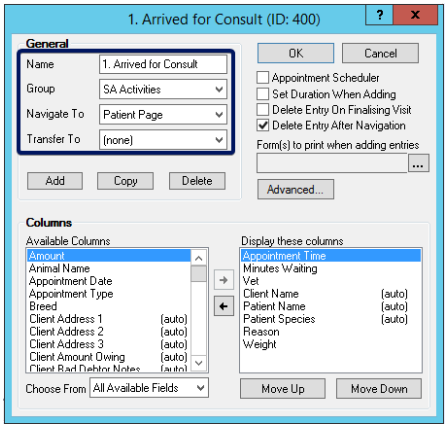
- Firstly, you need to be in the **clipboard** work area.



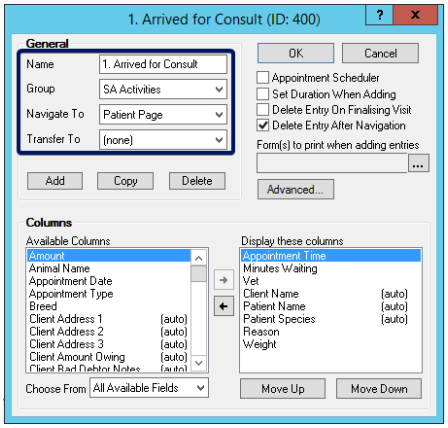
- You can configure any **individual clipboard** by right clicking on its name under a clipboard group and selecting **configure** from the menu.



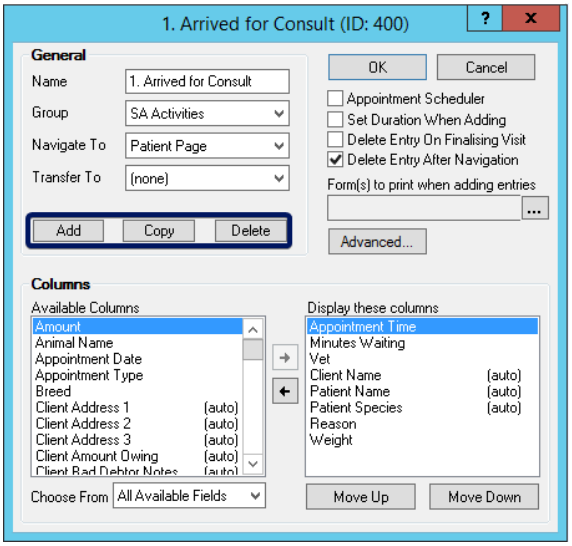
- The **Configuration Window** will open.
- There are various aspects to this window.



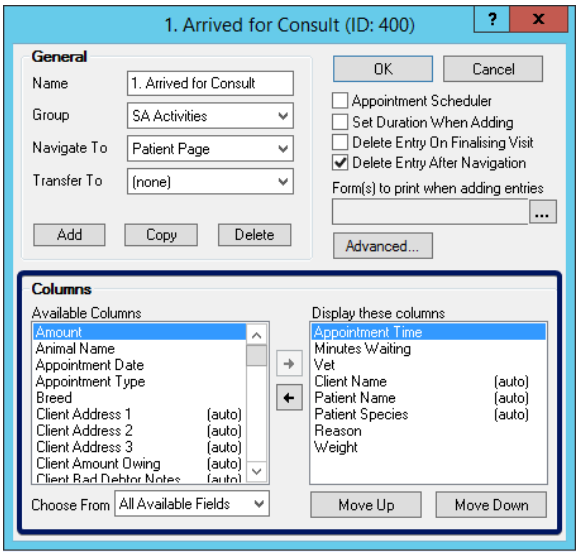
- **Name** - you can change the name of the clipboard which will be visible on the clipboard window.
- **Group -** you can change the clipboard group the individual clipboard appears in on the clipboards list. Select an option from the corresponding drop-down.
- **Navigate To -** you can choose the page 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.



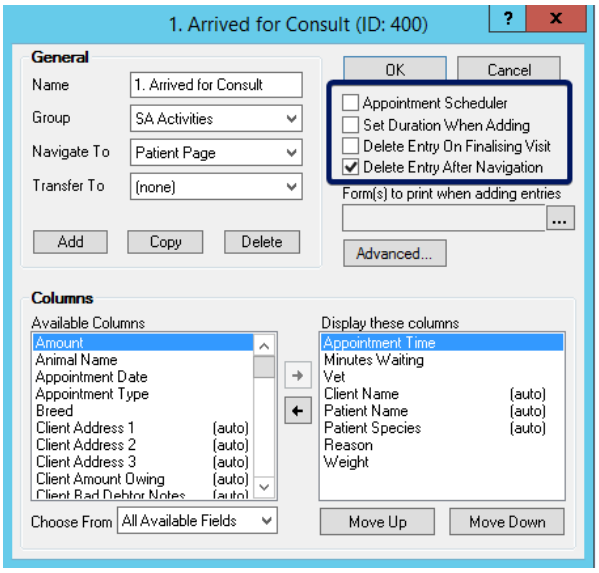
- **Transfer To -** you can choose from the drop-down list which will then transfer patients once work has been completed in one clipboard. He used a system to move patients and clients through series of clipboards as they visit progresses. A sign of progression might be from **arrived for consult** to **waiting to pay** to **follow up.**



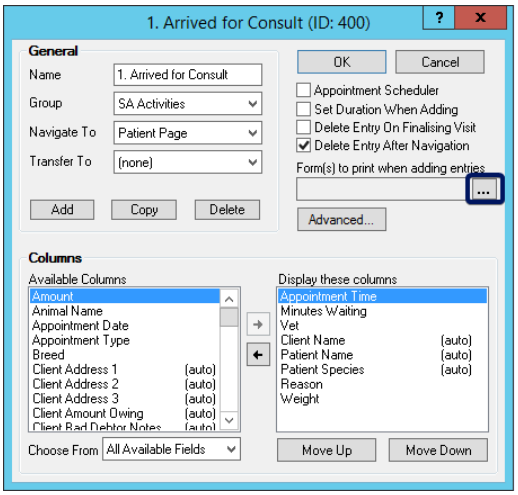
- **Add** - click **Add** to add a new clipboard.
- **Copy -** to copy the existing clipboard.
- **Delete** - delete the existing clipboard. Note that all records will be permanently lost.



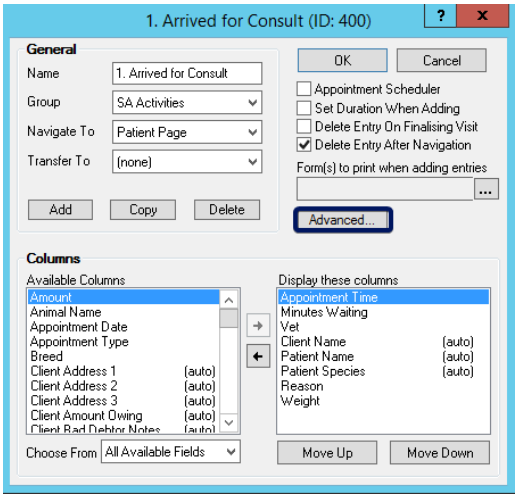
- **Columns Area** – the left box contains all the available columns. The right box contains the columns that will show on the clipboard when an entry is added.
- **Choose From:** use this drop-down to show all available fields or just fields for **Clients, Patients** or **Consultations.**
- Select the 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.



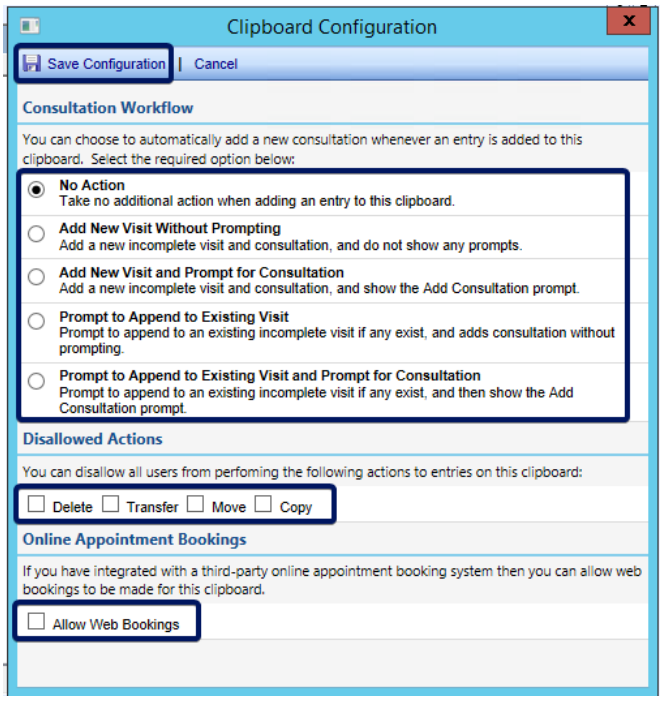
- **Appointment Scheduler –** Checking this option will ensure the clipboard is shown when the clipboard group is selected and is available to make appointments.
- **Set Duration When Adding –** This option is available only if **Appointment Scheduler** is not selected. It will prompt a time for any 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.



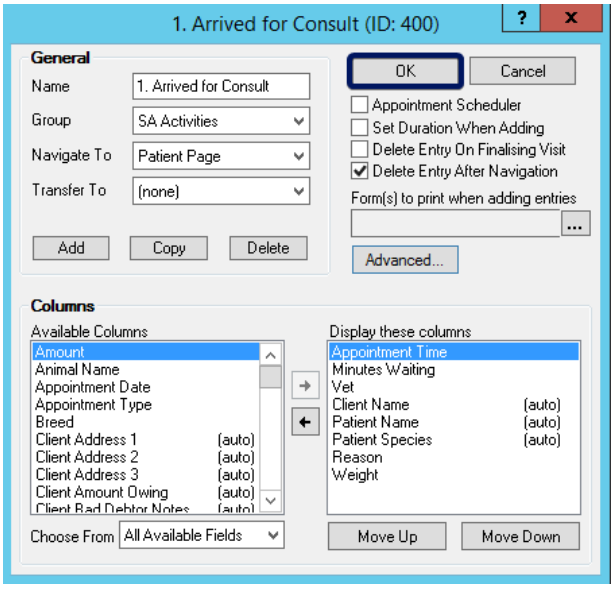
- **Form(s) to print when adding entries –** You can select documents to be automatically printed once an entry is entered on a clipboard.
- Click **…** to the right of the field to open a new window.
- Select the document you wish to print from the drop-down and click **Add.**



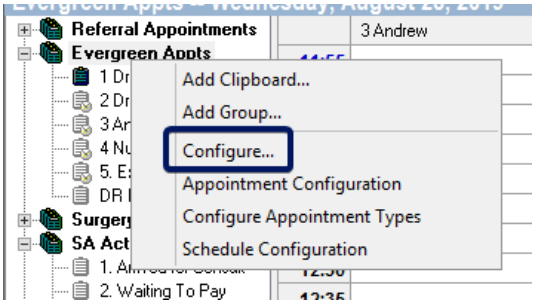
- **Advanced –** Choose whether a new **visit** should be created when an entry is added to the clipboard.



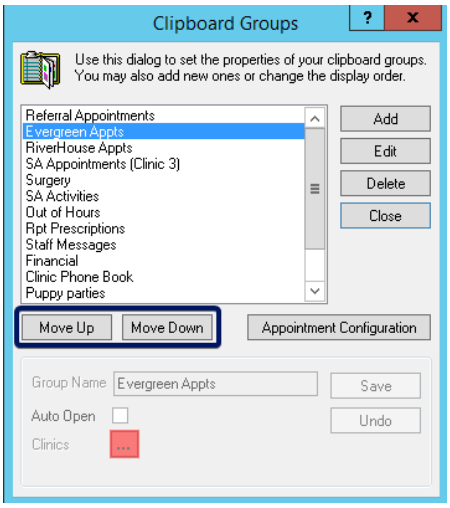
- The **Advanced Clipboard Setup Window** has several options.
- There are five different options regarding automatic new consultations. You can select the required one.
- **Disallowed Actions** - This allows you to choose what access levels all staff have on that clipboard.
- If you have an **integration** 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.



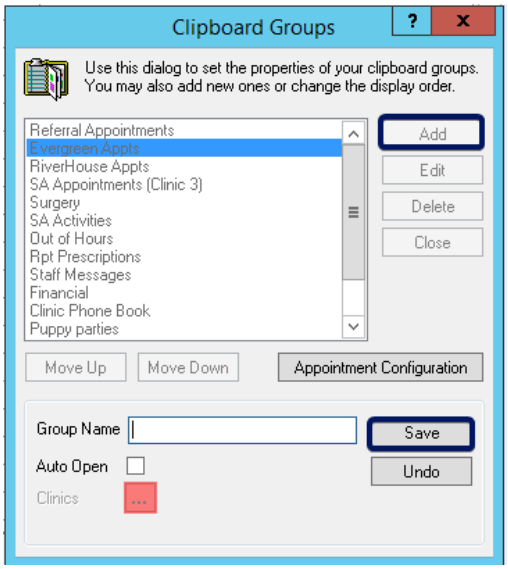
- Click **OK** on the clipboard configuration window to save all changes.



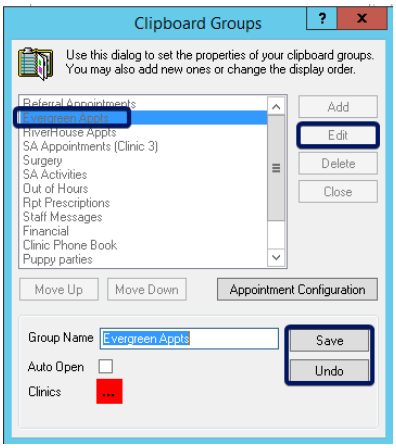
- You can configure any **Clipboard group** by right-clicking on the name of the clipboard group and selecting **Configure** from the menu.



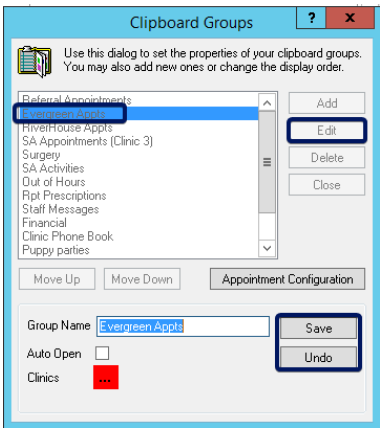
- The **Clipboard Groups Configuration** window will show.
- This allows you to set the **properties** of your clipboard group.
- The list in this window displays all the clipboard groups set up for your practice.
- Each clipboard group is listed in the order they are displayed on your clipboard work 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.

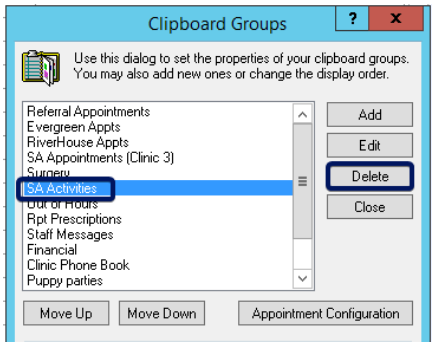


- If you wish to **edit** a clipboard group, select the group and select **Edit**.
- The lower area of the window will be accessible to edit the clipboard group.
- You can **Edit** the clipboard group's name.
- **Toggle** the **Auto Open** option. When selected, the clipboard group will

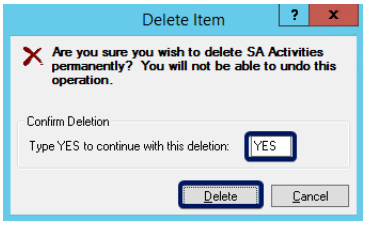


automatically be expanded to show individual clipboards.

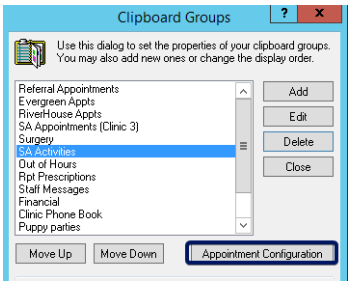
- If you have more than one branch, you can choose which clinics can view this clipboard group.
- Click **Save** to update any changes or **Undo** to cancel.



- **Delete –** If you want to delete a clipboard group, select it and then click **delete.**

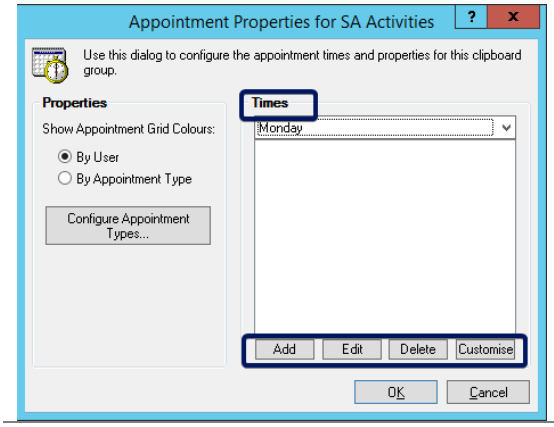


- A window will show asking to you confirm by typing **YES** and clicking **Delete.**

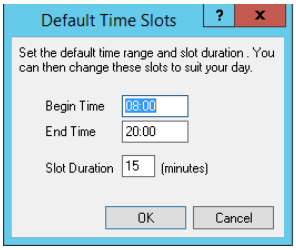


- **Appointment Configuration** – This will open the **Appointment Properties** window for the clipboard group.

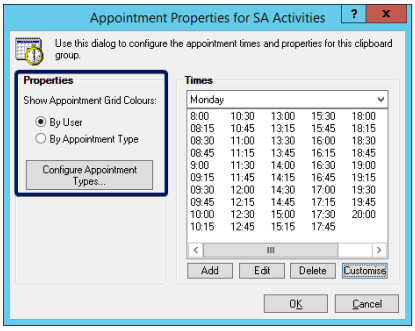
- In the **Times** area, you can set a time frame for when appointments can be made.
- You can then choose the time slots duration.
- You can **Add, Edit** or **Delete** a time slot in the calendar.



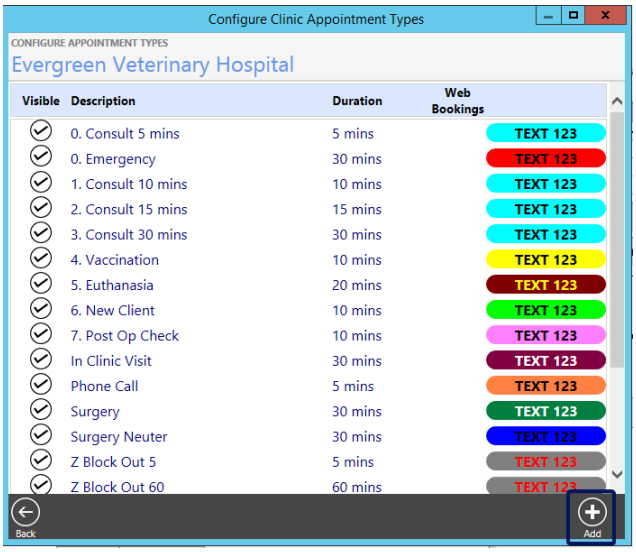
- Click **Customise** to customise the start and end times for **clipboard appointments.**



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

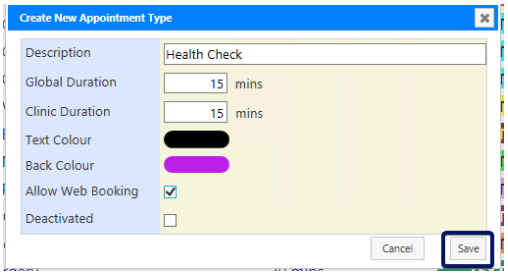


- In the **Properties Area** of the window you can configure whether to show appointment grid colours by user or appointment type.
- Click **Configure Appointment Types**, the corresponding window will open.



- You can **add new appointment type descriptions, edit** or **delete** existing appointment types.
- Click **Add.**

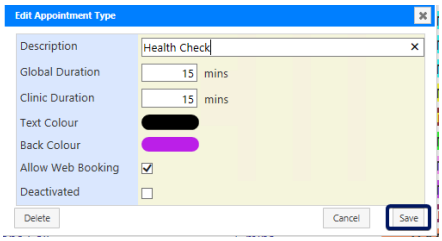
- Enter the details and duration for the new appointment type and set the



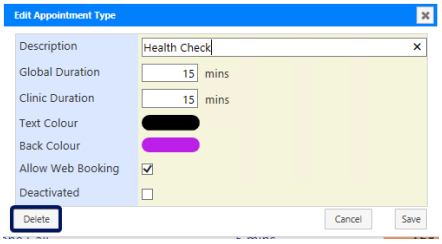
text and background colour to how you want it to appear on the clipboard.

- Click **Save.**

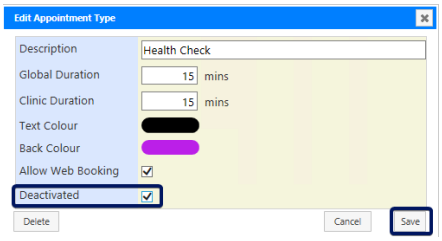
- If you want to **edit, deactivate** or **delete** an appointment type, click the description heading.



- 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**.