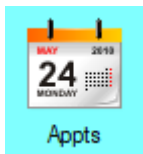
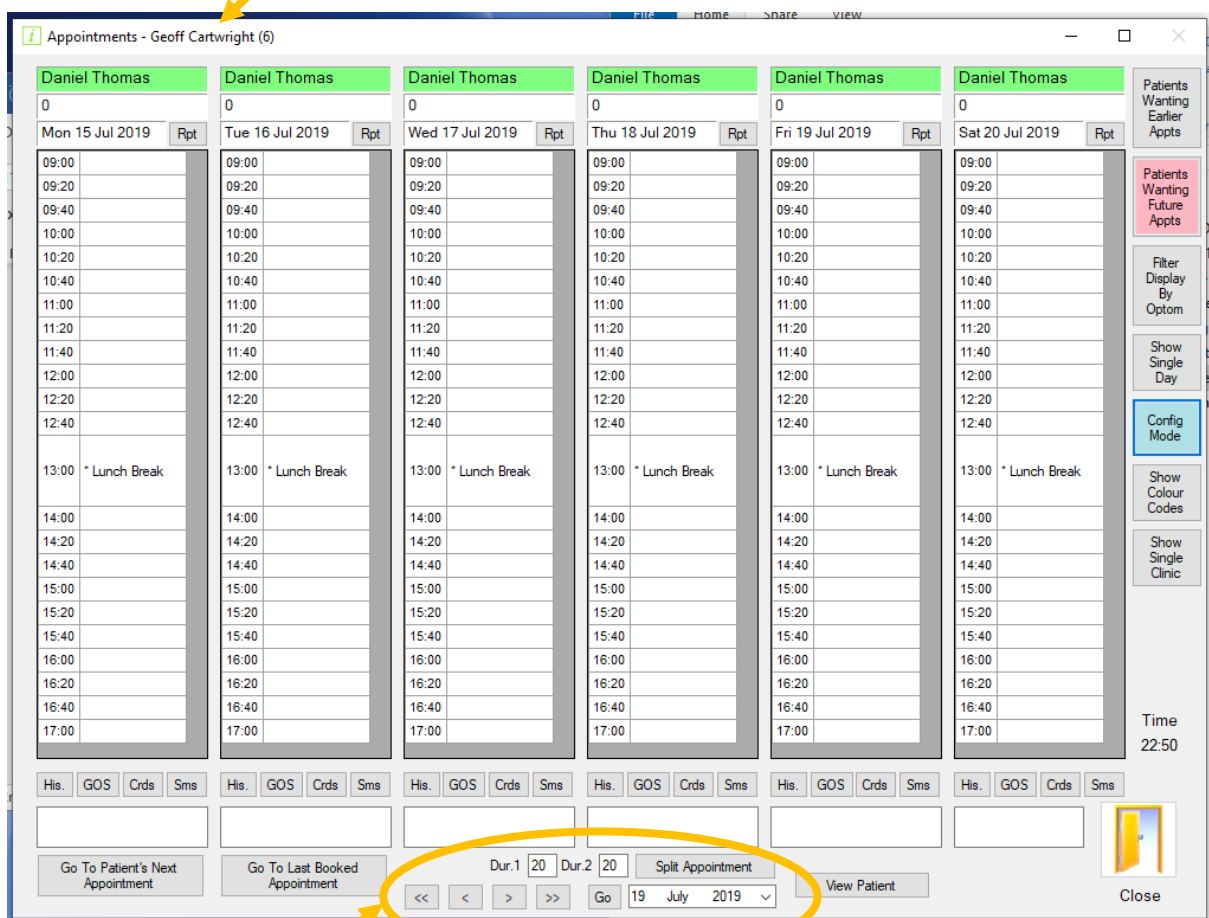


Booking an Appointment

Once you have an active patient you can then take them into the appointment diary, to do this you single click on the appointment icon along the bottom of the screen.



The appointment diary will open, with the clinic for today as the first clinic on the very left-hand side of the screen. If you do not have a clinic available today, then the left hand clinic column will be populated with the earliest upcoming clinic. The name of the active patient will be displayed at the top of the screen.



To navigate through the appointment diary, you can either use the arrows or the calendar at the bottom of the screen.

The image shows a set of navigation controls at the bottom of the screen. It includes two duration fields: 'Dur.1' with the value '20' and 'Dur.2' with the value '20'. To the right is a 'Split Appointment' button. Below these are four arrow buttons: '<<', '<', '>', and '>>'. To the right of the arrows is a 'Go' button, followed by a date selector showing '19 July 2019' with a dropdown arrow.

The double arrows will move the calendar forward or back six clinics so that you are presented with six new clinics to view.

The single arrows will move the calendar forward or backward one clinic only.

Selecting a day from the calendar will move the diary so that the selected day is the first clinic on the left-hand side of the screen.

The image shows a vertical appointment diary for Monday 15 Jul 2019. The time slots are listed on the left, and the patient names are listed in the corresponding slots. Some slots are highlighted in yellow, indicating booked appointments. The slots are: 09:00 (empty), 09:20 (Cartwright Mr G), 10:00 (McNamara Mrs M), 10:40 (empty), 11:00 (empty), 11:20 (Stone Mr A), 12:00 (empty), 12:20 (empty), 12:40 (Soap Mr T), 13:00 (* Lunch Break), 14:00 (empty), and 14:20 (empty).

Booked appointments are shown by displaying the patient name in the appointment slot. The appointment slot may also be coloured depending on how your system has been configured.

Available appointment slots will be white and will not have any text displayed.

Once you have found an available appointment double click on the available slot.

The image shows a close-up of a single appointment slot. The time '12:00' is displayed on the left side of the slot. The slot itself is white, indicating it is available. A yellow arrow points to the white space of the slot.

Double on the box of white space

This will open the edit appointment form.

From the Type drop down select the appointment type you wish to book.

If you need to make any notes about this appointment you can do this in the Notes section.

This notes section is ideal for recording any symptoms the patient may be experiencing. Not only will they be saved against the patients appointment (so are in a logical place for the optometrist to find before seeing the patient) but they are also saved with a time and date stamp in the patient activity notes. Other examples of notes that could go in this box include notes like; driving no drops, Pre Cat, Post Cat, Broken Specs, Struggling with reading.

You then need to save the appointment, there are several save options available, any that are not relevant for this patient will be greyed out.

Save with SMS will save the appointment and send the patient a text message confirming their appointment.

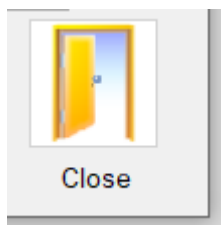
Save with receipt will save the appointment and print a slip on the receipt printer with the patient appointment information on.

Save with email will save the appointment and send the patient an email confirmation.

Save will just save the appointment into the diary without generating any form of communication.

The edit appointment form will close automatically after you have pressed one of the save options.

To close out of the appointment diary, click the close button.



Moving an appointment

The following process is used when a patient rings up to move their appointment to another time or day.

If applicable this process can be done without changing the current active patient record.

Open the appointment diary.

Navigate to the patient's appointment.

Single right clicking on the appointment slot.

The colour of the appointment time will change to a dark green colour to signify that the appointment is in the status of being moved.

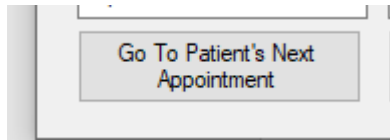


Once you have found a new appointment slot for the patient the double click on the slot as you did to book the original appointment – the original appointment type, and notes will be carried across so all you need to do is click one of the save options.

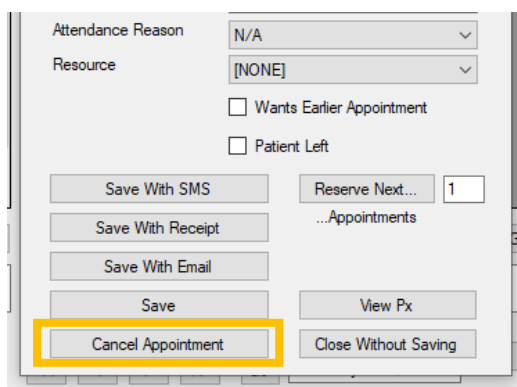
Cancelling an appointment

The quickest way to cancel an appointment for a patient is to make that patient the active record and then open the appointment diary.

Once in the appointment diary click on the bottom left hand button 'Go to patients next appointment'



This will move the diary to the patients next appointment and open the edit appointment form for their appointment. Click 'cancel appointment'.

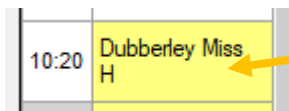
A screenshot of a web-based appointment editing form. The form has a light gray background and a white border. It contains several fields and buttons. At the top, there are two dropdown menus: 'Attendance Reason' with 'N/A' selected and 'Resource' with '[NONE]' selected. Below these are two checkboxes: 'Wants Earlier Appointment' and 'Patient Left', both of which are unchecked. In the center, there are four buttons stacked vertically: 'Save With SMS', 'Save With Receipt', 'Save With Email', and 'Save'. To the right of these buttons is a 'Reserve Next...' button followed by a small input field containing the number '1' and the text '...Appointments'. Below the 'Save' button is a button labeled 'Cancel Appointment', which is highlighted with a yellow rectangular border. To the right of the 'Cancel Appointment' button are two more buttons: 'View Px' and 'Close Without Saving'.

Appointment Status

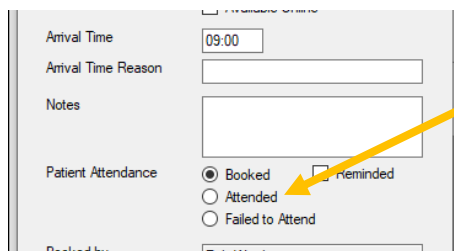
Appointment status - Arrived

When a patient arrives for an appointment you can change the status of their appointment to attended, if the practitioner has their clinic open in their consulting room then the status will be changed on their screen, so they know the patient has arrived.

Open the appointment diary, and double click on the patients appointment

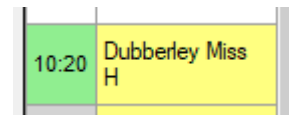


This will open the edit appointment pop up.

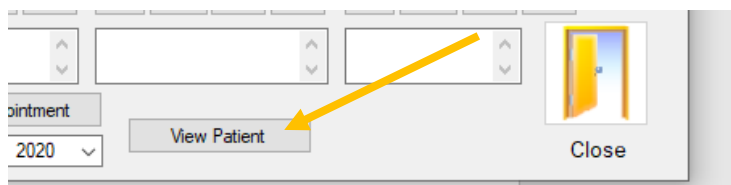


Click the attended bullet point


The edit appointment window will automatically close. And the time slot for that appointment will have gone green.

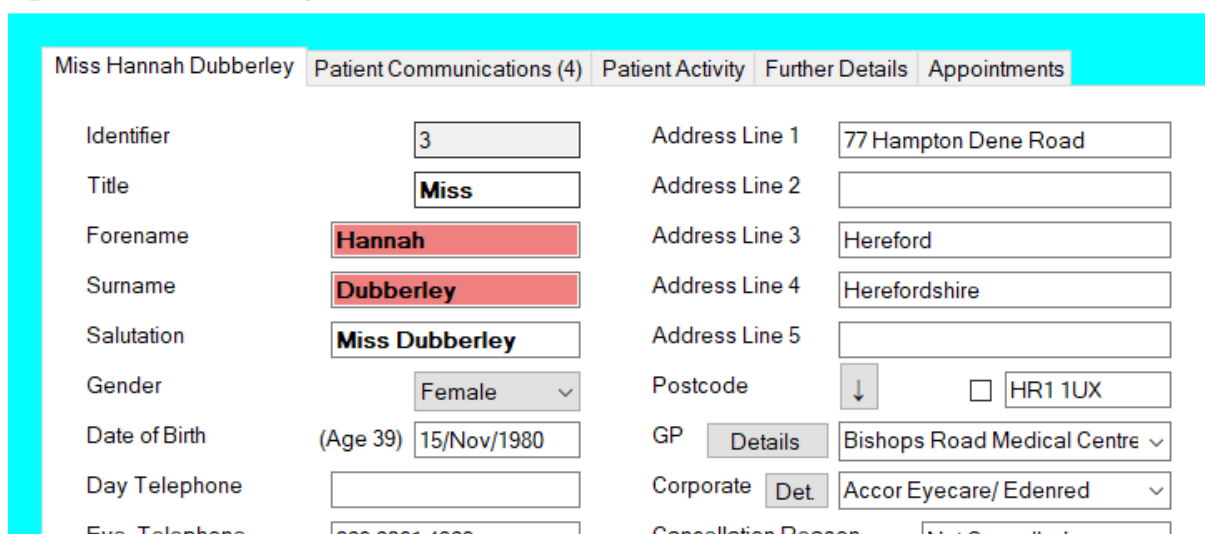


i-Clarity will have remembered which patients appointment was last opened so you click on the view patient button at the bottom of the form to make this patient the active record



The patient record will then open.

 Patients Records for Bristol Eyecare



Miss Hannah Dubberley		Patient Communications (4)	Patient Activity	Further Details	Appointments
Identifier	3	Address Line 1	77 Hampton Dene Road		
Title	Miss	Address Line 2			
Forename	Hannah	Address Line 3	Hereford		
Surname	Dubberley	Address Line 4	Herefordshire		
Salutation	Miss Dubberley	Address Line 5			
Gender	Female	Postcode	HR1 1UX		
Date of Birth	(Age 39) 15/Nov/1980	GP	Bishops Road Medical Centre		
Day Telephone		Corporate	Accor Eyecare/ Edenred		
Eve Telephone	0900 0001 4300	Cancellation Reason	Not Cancelled		

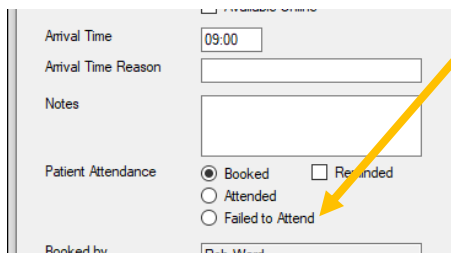
Appointment Status – Failed to Attend

If a patient does not attend their appointment, then the appointment status should be changed to failed to attend.

Open the appointment diary, and double click on the appointment the patient has not turned up for.



This will open the edit appointment pop up.



Click the failed to attend bullet point.

The edit appointment window will automatically close and the time slot of the appointment will go orange.

