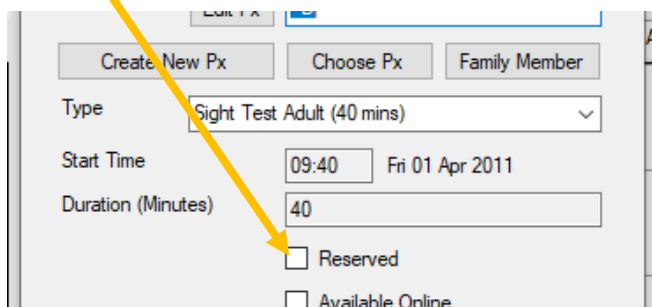## Reserving Appointment Slots

Reserving appointment slots will mark an appointment slot with the text reserved or a line of text of your choice. It is a feature that can be used in many different scenarios.

Some examples:

- Marking an appointment slot as unavailable.
- Marking an appointment slot as catchup time because the patient preceding it will need longer than a standard appointment
- Marking an appointment as a supplier rep visit
- Marking an appointment slot to be only used for specific appointment type.

Reserving an appointment slot

Double click on the appointment slot, instead of selecting an appointment type tick the reserved box.
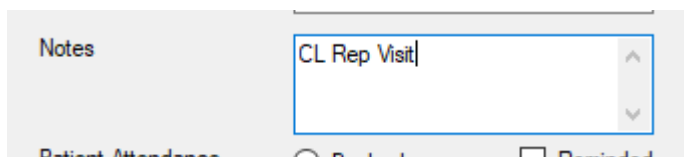

If you leave the appointment notes box blank, then when you saved the reserved appointment slot it will just show the text 'reserved'

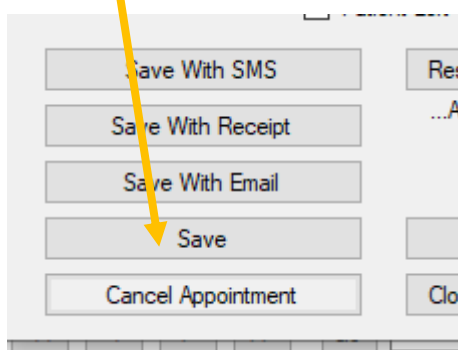Any notes you do write in the box will be displayed in that appointment slot.

Then click save.

Feature of The Appointment Diary v3 2 9 001

Un-reserving an appointment slot

To unreserve an appointment, double click on the reserved appointment.

11:00 | Reserved ← Double Click Here

Untick the reserved box

Create New Px | Choose Px | Family Member

Type   Sight Test Adult (40 mins)

Start Time   11:00   Thu 31 Mar 2011

Duration (Minutes)   60

☑ Reserved ← Click Here to Untick

☐ Available Online

Arrival Time   11:00

Arrival Time Reason

Notes
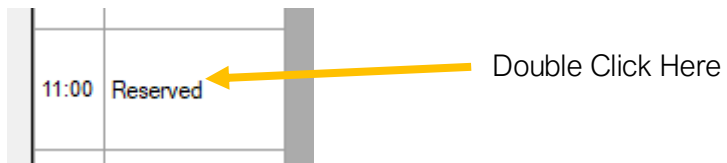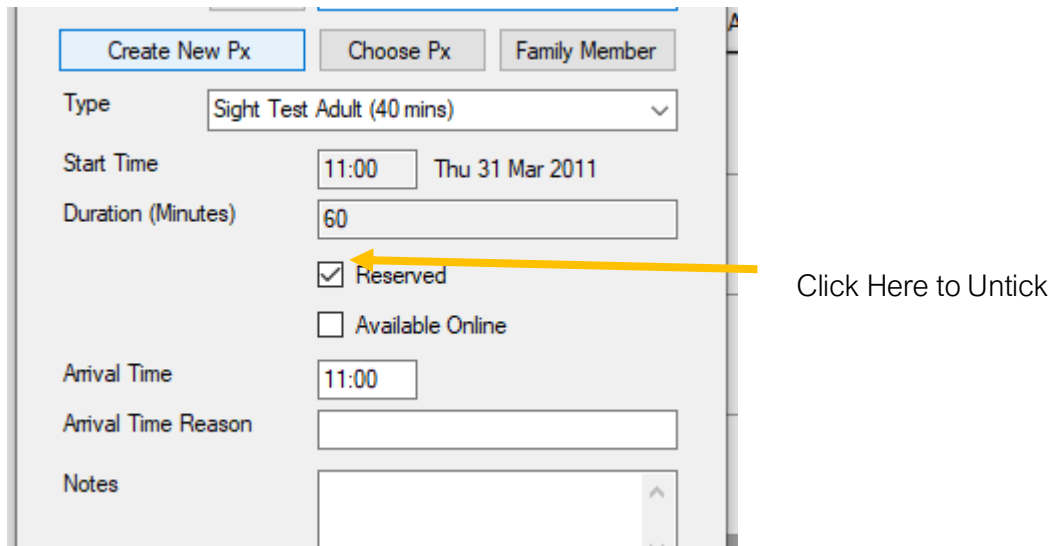
Then click unreserve and exit.

Save With Email

Save
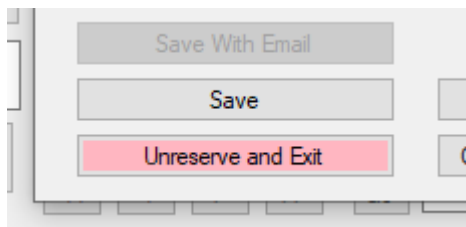
Unreserve and Exit

Un-reserving and booking an appointment

To unreserve and appointment and book the active patient an appointment.

With you patient the active record, open the appointment diary.

Double click on the reserved appointment

11:00 | Reserved ← Double Click Here

This will open the edit appointment window.

Select the appointment type you would like to book for the patient.

Feature of The Appointment Diary v3 2 9 001
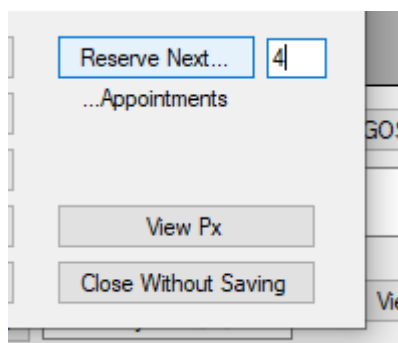
Then click save patient.

Reserving more than one appointment slot

If you would like to reserve several consecutive appointment slots, then double click on the first appointment slot.
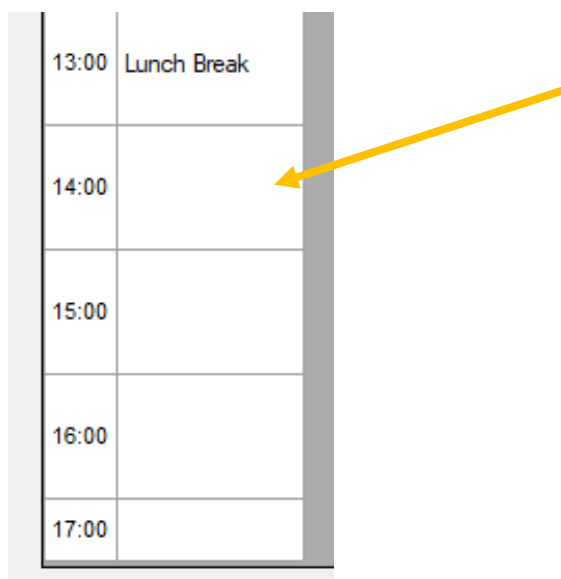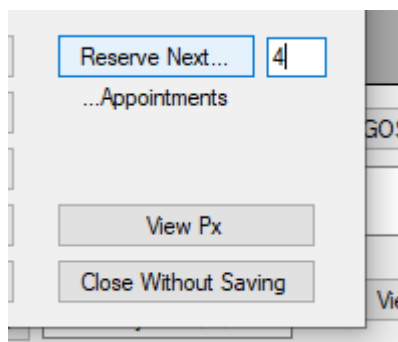

This will open the edit appointment window.

In the box next to the 'reserve next' button type the number of appointments you would like to reserve.

Click the reserve next button

The appointment window will close, and the appointments will be reserved.

|	
	1
14:00	Reserved
	1
15:00	Reserved
	1
16:00	Reserved
	1
17:00	Reserved

(if needed you can type in the notes field before clicking reserve next this will replace the reserved text with your note)

13:00	* Lunch Break
14:00	* Training
15:00	* Training
16:00	* Training

Feature of The Appointment Diary v3 2 9 001

Making appointments available online

If you have online appointment booking, then you will need to make appointments in your diary available to you online booking page.

Double click on the appointment you would like to make available.
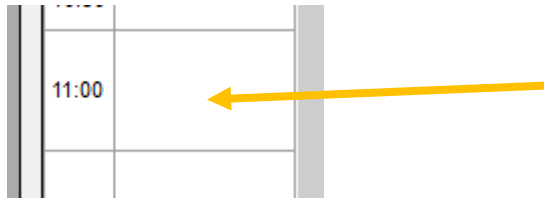
This will open the edit appointment window.

Tick the 'Available Online' option

Click the pink button at the bottom of the window, 'Make available online'.
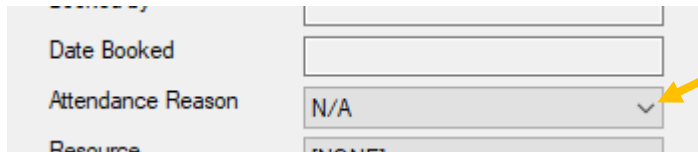
Appointment attendance reason

When booking an appointment, you can select from a predefined list the reason the patient is booking the appointment. This information is then available in a report, the idea is it allows you to see if your patients are responding to their recall communication or waiting for another reason to book an appointment, such as broken spectacles or a change in vision.

On the edit appointment window

Click on the arrow next to the attendance reason field

Select the applicable reason and then continue with the normal appointment booking procedure.

(The list of options in available to select is defined by the list in the maintenance of your i-Clarity)

Appointment Resource

Also, within the edit appointment window is the ability to assign a resource to the appointment. This will marked that booked appointment as using that resource. This has two possible uses.
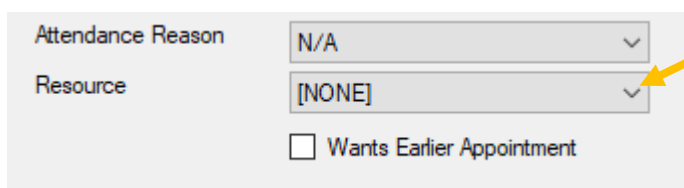
1. As a reminder that resources needs to be prepared/organised in advance of the appointment
2. To show that resource is being used at that time so another appointment that requires that resources should not be booked at the same time

Things that may be included in your list of resources, parking space, disabled access required, specific equipment required.

The list of resources applicable to your practice can be entered into the maintenance module of your i-Clarity system.

On the edit appointment window.

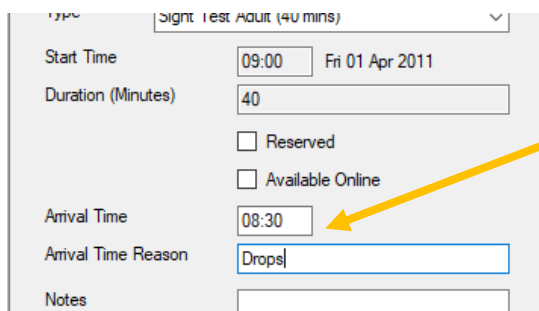Click on the arrow next to the resources filed.

Select the applicable reason and then continue with the normal appointment booking procedure.

Early arrival

One of the features of the appointment diary is early arrival. The early arrival feature allows you to mark an arrival time for the patient that is before the appointments start time. This situation can be useful are when you need the patient to arrive early for pre-screening, drops or contact lens insertion. Any communications now sent through i-Clarity to the patient about this appointment will have this early arrival time included instead of the appointment start time.

The system can be configured so that certain appointment types automatically allocate an early arrival time and reason. This is done in the maintenance of the system. If this is the case when you select the appointment type the arrival time and reason box will automatically be populated
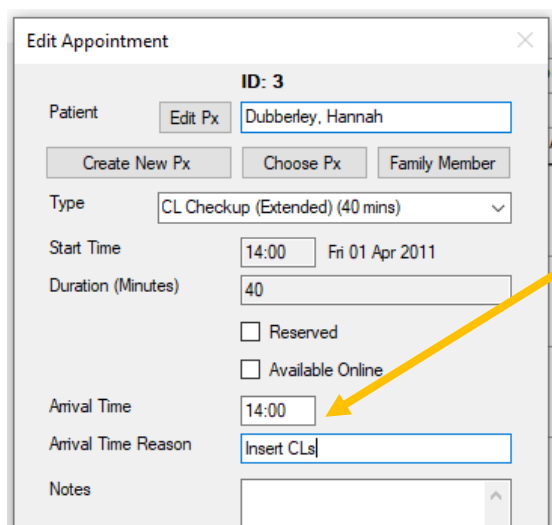
You can also add an early arrival time and reason to an appointment on an ad hoc basis.

One the edit appointment window

Type the time you would like the patient to arrive in the Arrival time box and type the reason in the box below.

Continue with the appointment booking procedure as normal.

Any appointments that have an early arrival will displayed with the time in grey.

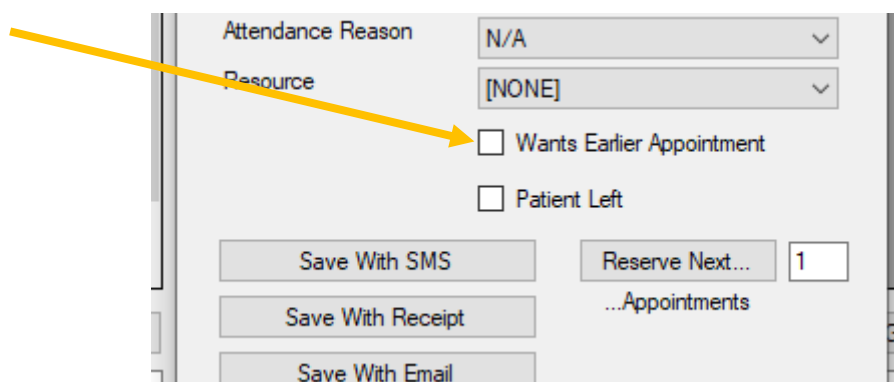

Patients wanting earlier appointments

i-Clarity has the facility to keep a list of patients that ideally would like to come in earlier for an appointment than the one they were able to book.

When booking an appointment, on the edit appointment window.

If the patient would like to have an earlier appointment tick the 'wants earlier appointment' box on the edit appointment window.
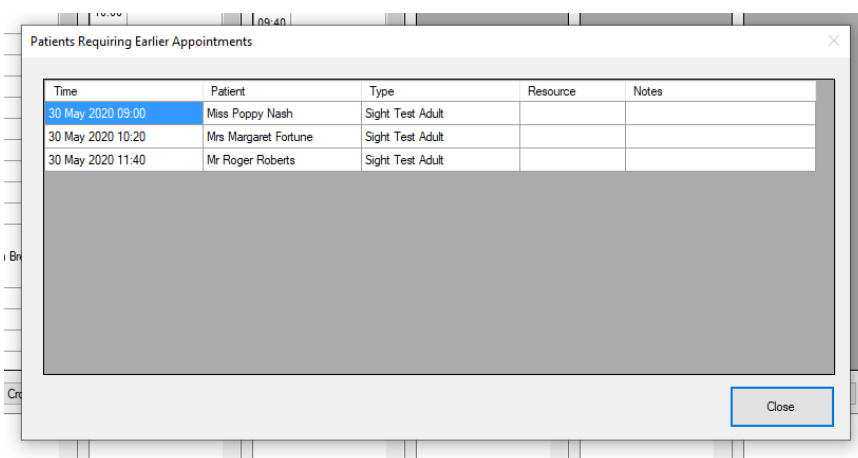

Continue with the appointment booking process as normal.

This will add the patient to a cancellation list. This list can be viewed by clicking the button 'patients wanting earlier appointments.
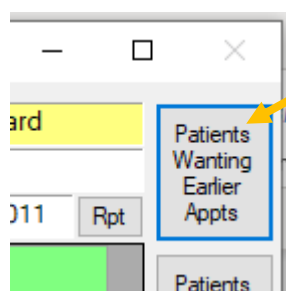
This patient will be removed from the last on the date of their booked appointment if you are unable to book them an appointment beforehand.

If there are patients listed in the 'Patients requiring earlier appointments' window, then the button will be pink.
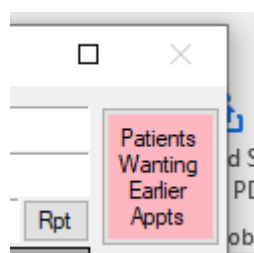
If you have an appointment become available, click on the 'patients wanting earlier appts' button. Double clicking on the patient name will take you to the patients booked appointment. A single click on the appointment will allow you to click the view patient button at the bottom of the appointment page to view the record and see if they are available to move their appointment to the available appointment slot.

Patients wanting future appointments

i-Clarity also has a facility to record a list of patients who do not have appointments already booked in the appointment diary but would like one when an appointment becomes available.

An example of when this feature can be used is when you have patients returning from university for a weekend or holiday and would like an appointment but you do not currently have an appointment available on the weekend they are back.

To add a patient to this list. Firstly, you need to make sure the patient record is active

Then open the appointment diary and click the patients wanting future appointments button.
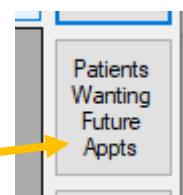
The active patients ID and name will be displayed in the fields along the bottom of the window.

You can leave the expiry date as the default or you can edit it to match the specific day the patient want to come in or the last day the patient can come in for an appointment. Then select the Appointment type the patient requires from the drop-down list. If the patient would like to see a particular member of staff, then select their name from the drop down. You can also do the same if there is a resource required for this appointment. Then click Add.

This appointment will be removed from the list after the expiry date.
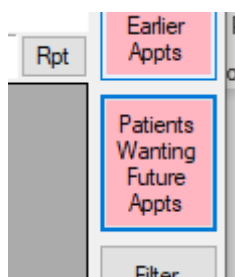
If there are patients listed in the 'Requiring Future Appointments' window, then the button will go pink.

Double clicking on the patient name will open the patient record.

Filter Appointment Display

Another feature of the i-Clarity appointment diary is that it allows you to Filter its display by practitioner name or staff type. This will then only display clinics for that individual staff member or the clinics of that staff type. Allowing you to flick through the clinics for that staff member quicker.

Feature of The Appointment Diary v3 2 9 001

Single click anywhere in the clinic of the staff member you want to filter the display by.

Single click anywhere in the optometrist clinic

Then click 'filter display by optom' button.

This will then filter the display of i-Clarity so it just shows clinics for this staff member, if you click the button again it will show clinics for all staff member of that staff type.
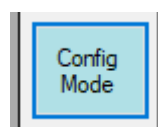

Show single day

Clicking this button will change the diary view so that it only shows clinics for one day at a time rather than filling all six clinic spaces with the next six clinics of more than one date.

Once clicked the button will have changed to say show all days so that if it is clicked again i-Clarity will return to showing six clinics at a time.
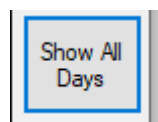
Config Mode

 Clicking config Mode button changes the status of the appointment diary from a standard state to a state of configuration. The clinic length will shorten, and more buttons will appear at the bottom. The function of these buttons will be covered in another document.
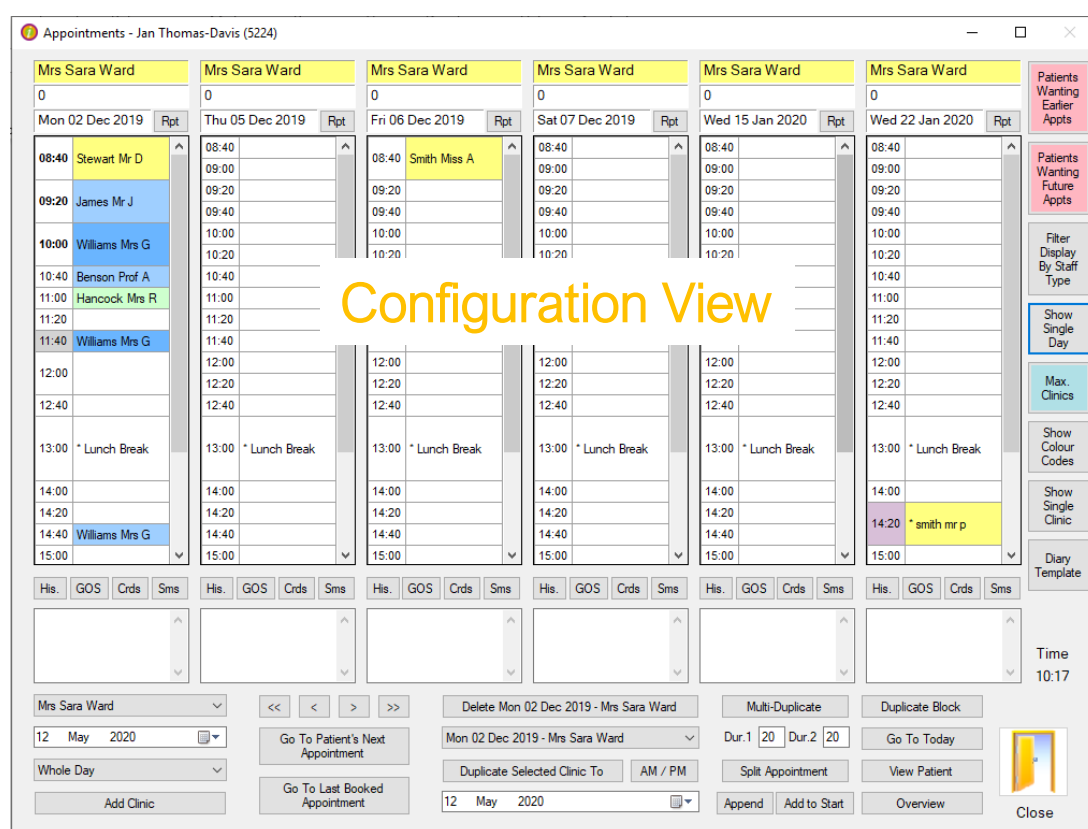
 Once clicked the config mode button will change to say max clinics.

Clicking on the max clinics button will change the state of the appointment diary to a maximum clinic length view. The clinic length will extend and there will be very few buttons at the bottom of the page.
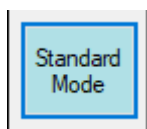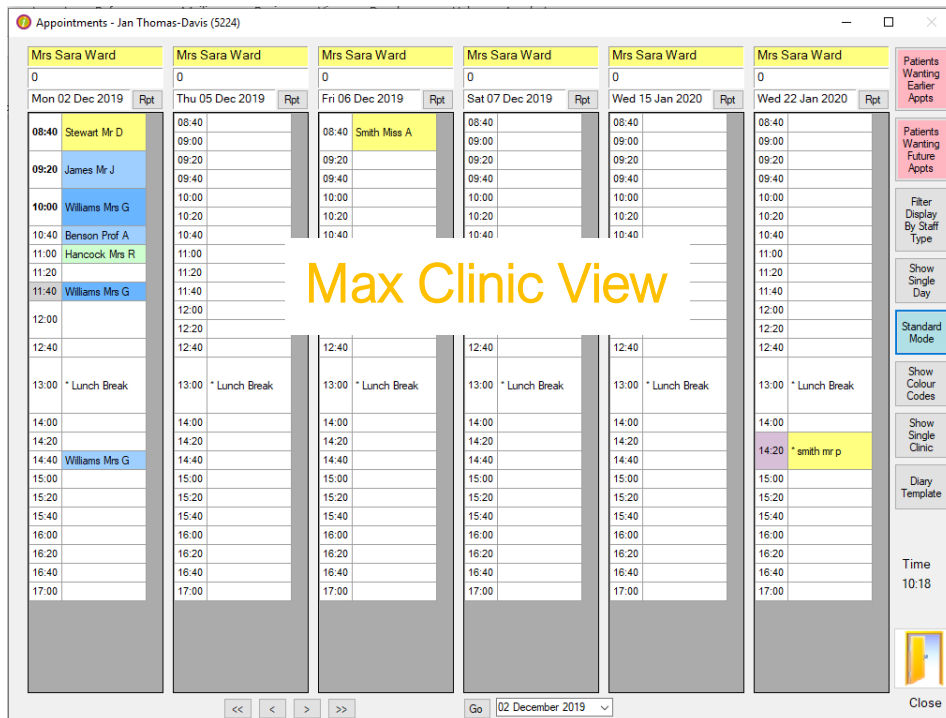
Max Clinic View

Once in the max clinic state the button will change to say, Standard Mode.

Clicking on the standard mode button will return the appointment to the standard view.

Standard View
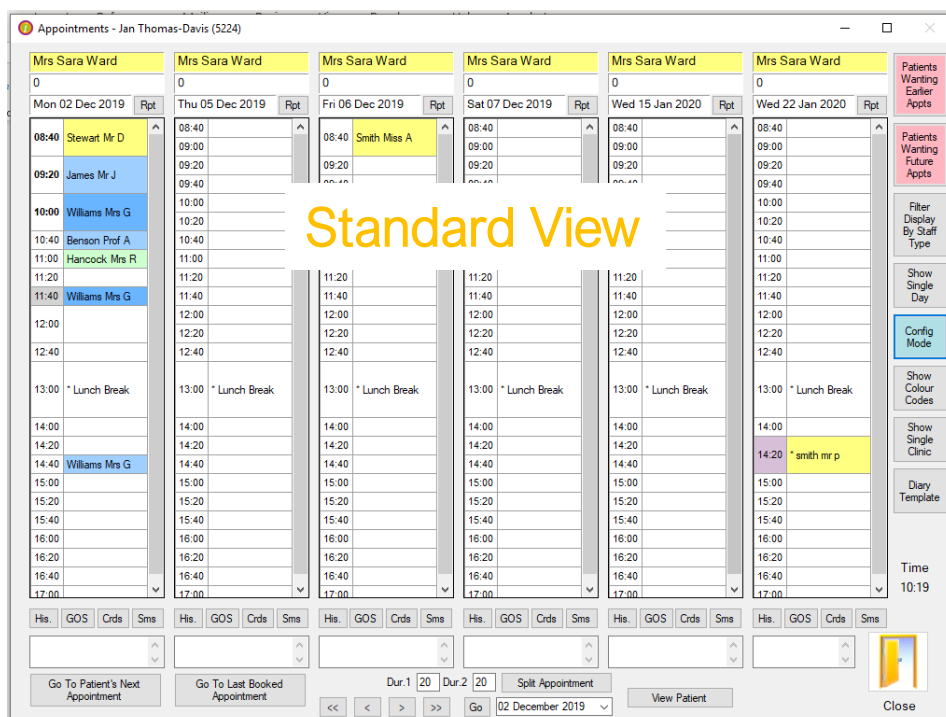
Colour Codes

Show colour codes, clicking this button will open a window that shows the meaning of the colours for appointment status which get displayed in the time slots and a the meaning of the colours for appointment type which gets displayed in the appointment slot.

Time Slot, colour in this area shows the appointment status

Fe .... ary v3 2 9 001

Appointment Slot, colour in this area shows the appointment type
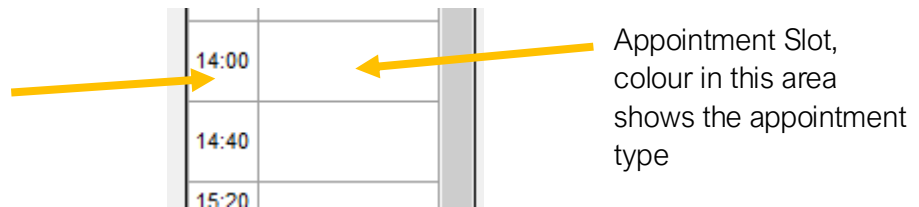
Clicking on the 'Show Colour Codes' with open an appointment type window to show the colours codes
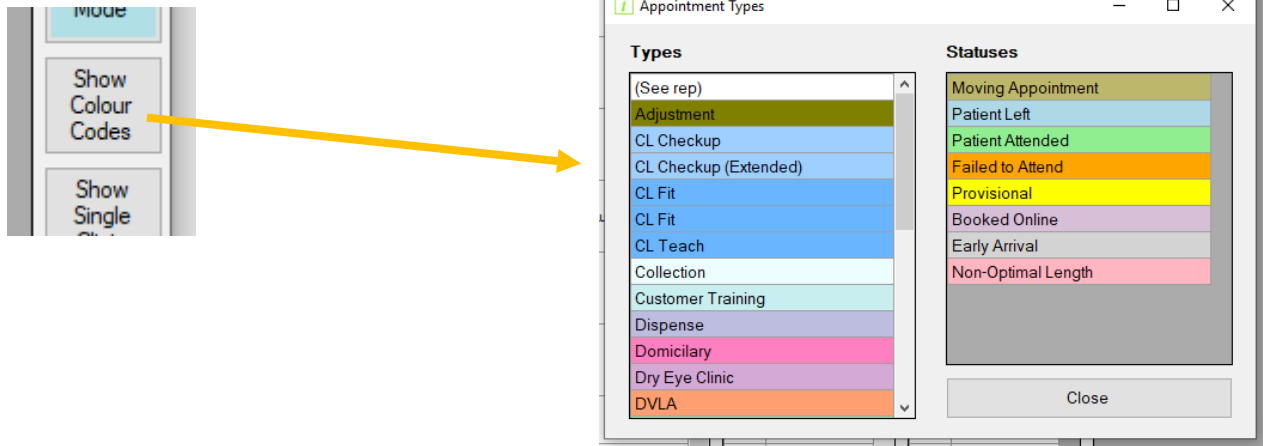
Show single clinic

The show single clinic button will open a selected clinic in a separate window. This window will stay open when the appointment diary is closed. The clinic in this window will refresh and show any changes to the main diary, including a change of appointment status. So as patients' appointments get marked as attended the appointments in the single clinic window will also change to show the patient has arrived.

This will be most useful in the examination room, where the clinic for that room/practitioner can be viewed by the side of your i-Clarity screen whilst you are viewing the patient record or completing the clinical record.

Another scenario when this single clinic window is useful is when you would like to complete clinic analysis of a historic clinic. As standard the i-Clarity appointment diary opens with todays clinic as the very left-hand column or the first clinic in the future in the left hand column. If you are opening and reviewing patient records from a clinic in the past then this means every time you open a patient record when you return to the diary you will have to navigate back to the historic clinic. If you open the clinic in a single clinic window you will be able to open the patient records from this window.

Open the appointment diary.

Single click anywhere in the clinic you would like to open in a separate window.

Single click anywhere in the optometrist clinic

Then click on 'Show single clinic' Button

This will open the selected clinic in a separate window.

Feature of The Appointment Diary v3 2 9 001

To open a patient record from this window, double click on the patient's appointment as you would in the appointment diary.

This will open the patient edit appointment window.

Allowing you to see any appointment notes.

From this window click on the View patient button

(If you have a practice running a single clinic each day then this feature may also be useful on front desk. As a patient arrives then front of house can double click on appointments in the single clinic and mark them as attended, reducing the need to open the appointment diary)

Diary Template.

The diary template button will open a new window which allows you to create different diary templates that can be copied into your main diary. More details of this feature will be covered in a separate document.
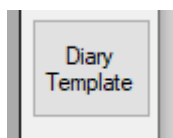
Clinic Buttons

Each clinic has features mainly located under buttons located at the top and bottom of each clinic.

The report button.

Clicking the 'Rpt' button at the top of the clinic will open a new window with a clinic report.

Clinic Report for Mrs Sara Ward on Sat 30 May 2020. Branch: Bristol Eyecare

Time	Type	ID	Name	Age	New	NHS	Att.	Phone	Notes	Dur.	Ideal	Rx	£	Rec.	O/L
08:40										20	0				N
09:00	Sight Test Adult	2052	Miss Poppy Nash (30 Jan 2002)	18		Y	Y	07913670754	Flashes and Floaters	20	40				N
09:20										20	0				N

This can be printed out by clicking on the printer icon at the top of the screen. This report is especially useful for clinic preparation when you need a list of patients to use to pull records from the filing cabinet.

There are 4 buttons along the bottom of each clinic in the appointment diary. They have the following functions.
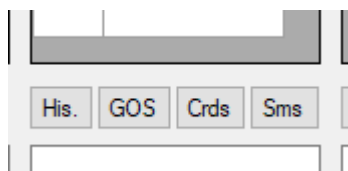
Clinic History

Clicking on the 'His' button at the bottom of the clinic will open a new window with details of the clinic history. You will be able to see which appointments have been booked, cancelled, and moved in this clinic.

GOS

GOS, clicking the GOS button at the bottom of the clinic print the GOS forms required for this clinic. It does this by firstly checking the type of appointment the patient is booked in for, to check if it is a eligible appointment type for a NHS claim and then it will check the patient record to see if they have a selected NHS reason on the front.

In the maintenance of your system there is the field which links a word document to this button. This allows you to decide if you would like to print just GOS1 forms or also print GOS2 forms.

Cards

Clicking on the 'Crds' button will open and print a word document for each patient in the clinic. This is mainly used to print a new clinical record card, and if required can print a different record card for eye examinations and contact lens appointments.

If you are using clinical records then you will have no need to print a new record card for the patients appointment but because this button links to a word document of your choice and design you can put this button to other uses. For example if you have a reception desk close to the waiting room you could print off the patients details and ask them to check and amend the details on the print out rather than reading the details from the record out load. This print out that you as the patient to check and complete could also have a lifestyle questionnaire included

SMS

Clicking the SMS button at the bottom of a clinic will open a new window, in this window will be a list of patients who have an email or SMS number that can be used by i-Clarity will be displayed.

If you don't want to send a communications, then you can untick the box next to the patients name underneath the SMS or Email columns. You can also amend the content of the message if need be. Once you are happy with the communications that are due to be sent click, send reminders.

The main reason you may want to untick a sms is because you have a family booked in and one parent would be receiving several messages. In this situation you could just leave the first family members appointment ticked and then amend the content to say you and (other family members name) have an appointment starting at (time).

Another reason you may want to untick a line is if a patient has two appointments booked for example an eye exam and CL check. You would untick the second appointment in the list.

Once the communications have been sent, those patients appointments that had a communication will show a change in status.

The time of the appointment will go bold to show they have been reminded.

his is because the reminder tick box on the edit appointment screen for that patients appointment will be ticked. For any patients who did not provided a number or email you can manually tick this reminded box once they have been called.
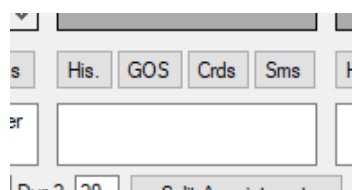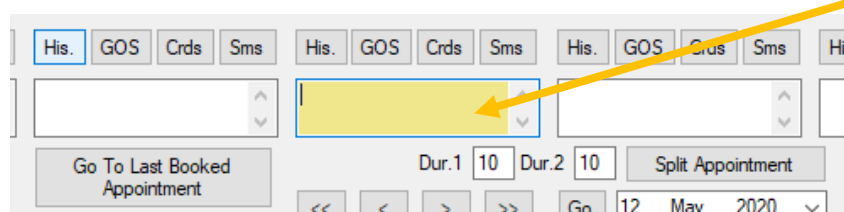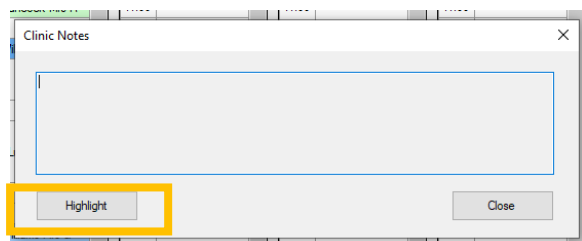

Clinic Notes

Feature of The Appointment Diary v3 2 9 001

At the bottom of each clinic is a free text notes box, this can be used to record information about that day or clinic.

If you double click on this box it will open in a separate window. In this window is a highlight button. Clicking this button will highlight the notes box, and can be used to draw attention to important clinic notes.
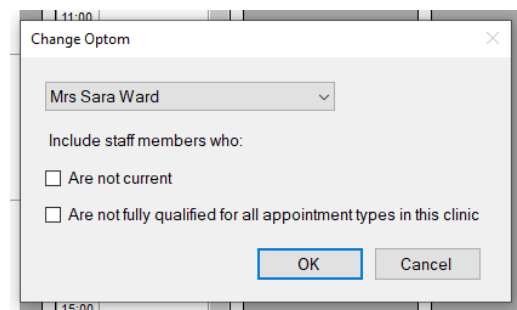
Highlighted Notes Box

Changing practitioner running clinic

If you need to change the name of the practitioner running a clinic you can do this by double clicking on the practitioner name above the clinic.
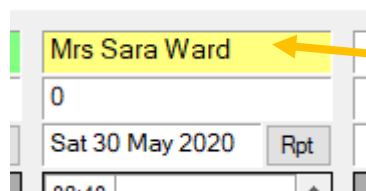
Double click on practitioner name here

This will open a change optom window.

The drop down list of optoms will show staff have the same staff type so are able to complete all the potential appointments in this clinic. If you need to see other members of staff then you can use the tick boxes to increase the list of staff.

Once you have selected the staff member who will be taking over the clinic click ok, which will change the name of the practitioner at the top of the clinic.

Amending appointment length

Depending on the configuration of your system i-Clarity will automatically adjust appointment slot lengths to match the length of the appointment type booked into that slot. Before adjusting

the appointment slot length i-Clarity will check the next slot to make sure there is no other appointment booked.

i-Clarity will always take time from below and will only include the part or whole of the next available slot not the one after.

Appointment slots lengths can be altered in the following ways.

Splitting an appointment

This is used when you need to start an appointment partway through an appointment slot.

Click on the appointment slot that contains the start time of the appointment you would like to book.
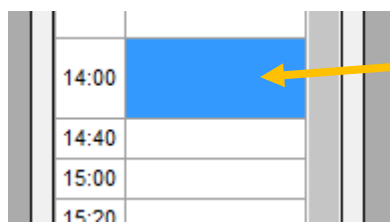

For example, I want to book an appointment for a patient at 14:20. I have single clicked in the appointment slot that starts at 14:00

At the bottom of the appointment diary there is a button called 'split appointment'. Next to this is two time duration fields. These will get automatically populated with half the duration of the appointment slot selected.
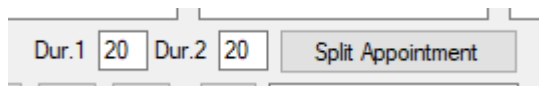
Then click 'split appointment', this will create two appointment slots so you can then book the appointment in the second slot.
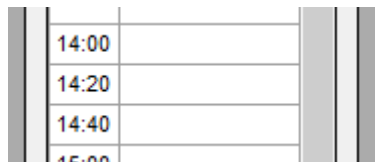
If required before you click split appointment you can manually amend the default durations in the split appointment section. For example if you wanted the appointment to start at 14:10 then after selecting the appointment slot you would amend the duration 1 field to 10, the duration 2 field will automatically change to 30.
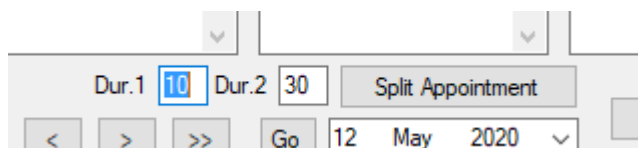
Extending or shortening appointment lengths

You can also manually adjust appointment lengths by double clicking on the time next to the booked appointment.

Feature of The Appointment Diary v3 2 9 001
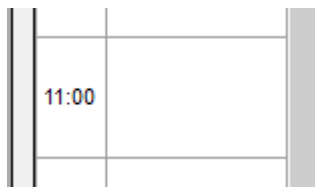
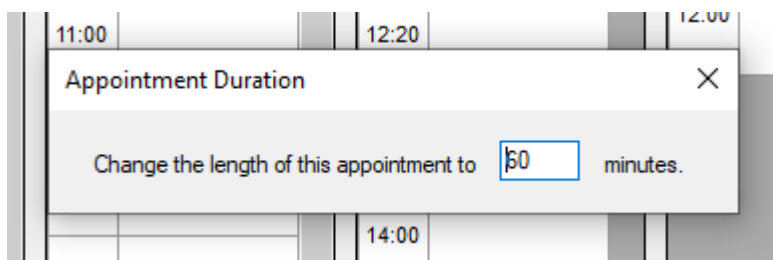A time window will appear, that contains the current duration of the appointment slot.

Over type the time displayed with the length you would like this appointment to be and click enter on the keyboard.

The appointment slot with then reduce or increase to the duration that was entered.
(i-Clarity can only extend to the duration on the next appointment slot as it runs a check to make sure it is available and not booked)

Appointment time slots can be adjusted with or without a patient appointment booked into it. If there is a patient appointment booked and the time is amended to so that it is a different duration to the default appointment duration of that appointment type the time slot will go pink to signify that this appointment time has manually been adjusted.

Feature of The Appointment Diary v3 2 9 001

Other Appointment Diary Features

Go to patients next appointment

Located at the bottom of the diary page there is a button called 'Go to patients next appointment'

Clicking on this button will open the active patients next edit appointment window.
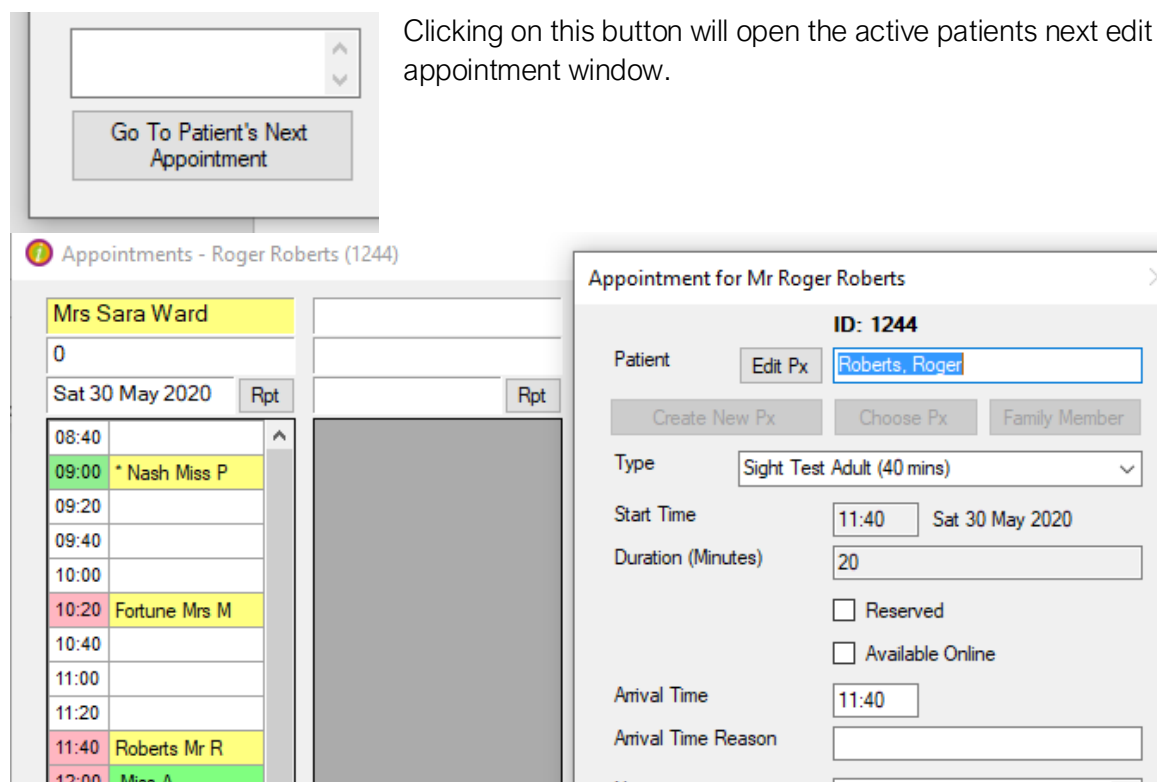
Go to last booked appointment

Clicking on this button located at the bottom of the appointment screen will navigate the diary to the clinic where the last appointment that was booked.

NHS early booking warning

The i-clarity appointment diary has an NHS appointment early warning feature. If an NHS patient is booking an appointment earlier than their due date the system will present you with a warning when booking, you can still continue to book the appointment but it is there to remind you to ask the patient for a reason as to why they are booking early.

Feature of The Appointment Diary v3 2 9 001