



Contents

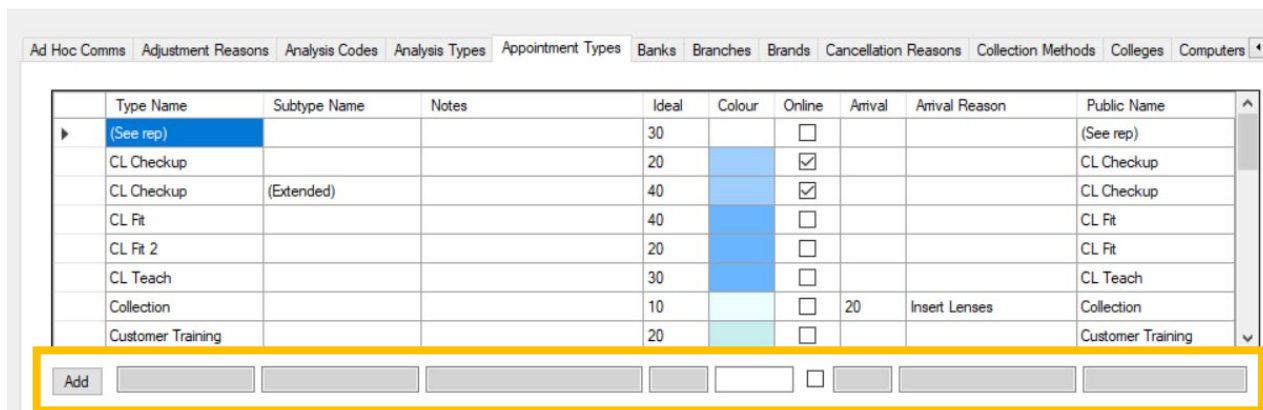
Appointments	2
Adding appointments	2
Assigning appointments to users	3
Custom appointment lengths	6
Replace appointment types	7
Remove appointment types	9
Resources	16

Appointments

Adding appointments

In the maintenance module, navigate to the Appointment Types tab.

Start on the top half of the page by adding the appointment types you need:



Type Name	Subtype Name	Notes	Ideal	Colour	Online	Arrival	Arrival Reason	Public Name
(See rep)			30		<input type="checkbox"/>			(See rep)
CL Checkup			20		<input checked="" type="checkbox"/>			CL Checkup
CL Checkup	(Extended)		40		<input checked="" type="checkbox"/>			CL Checkup
CL Fit			40		<input type="checkbox"/>			CL Fit
CL Fit 2			20		<input type="checkbox"/>			CL Fit
CL Teach			30		<input type="checkbox"/>			CL Teach
Collection			10		<input type="checkbox"/>	20	Insert Lenses	Collection
Customer Training			20		<input type="checkbox"/>			Customer Training

Below the table, there is an 'Add' button and several input fields for creating a new appointment type.

From left to right fill the boxes in containing:

1. The name of the appointment type in the first box.
2. Any subtype in the next box e.g. an extension of the appointment name. If the appointment type was eye exam you may have a subtype name of child.
3. Any notes about the appointment type in the third box (these notes are not displayed in the appointment diary; they are only displayed in this form).
4. The length of the appointment in minutes goes in the fourth box from the left.
5. Double click in the white box to open the colour pallet to select a colour for the appointment.
6. (Optional) Check the checkbox if you want the appointment type to be bookable by patients online.
7. (Optional) If this appointment requires a patient to attend the practice earlier than their appointment with the clinician (e.g. to insert contact lenses) you can put how many minutes earlier they need to arrive in the next box. When these appointments are booked any communications from the system will display the earlier time e.g. Printed appointment slips, confirmation text messages and emails. The time slot of the appointment changes colour to grey to identify that the patient is expected earlier than the time the patient is booked to see the Clinician.
8. (Optional) In the next box you can put a reason for the early arrival e.g. Needs drops.
9. The last box titled Public Name; the contents of this box is the how the appointment name will be displayed on any communications to the patient e.g. confirmation text messages. The appointment type name is only displayed within the system. This allows you to have a more descriptive name within the system but a more straightforward name

displayed on any patient communications. It will automatically be completed with the appointment type name however you alter this if you would like a different public appointment name.

Once all the relevant boxes are filled in click add

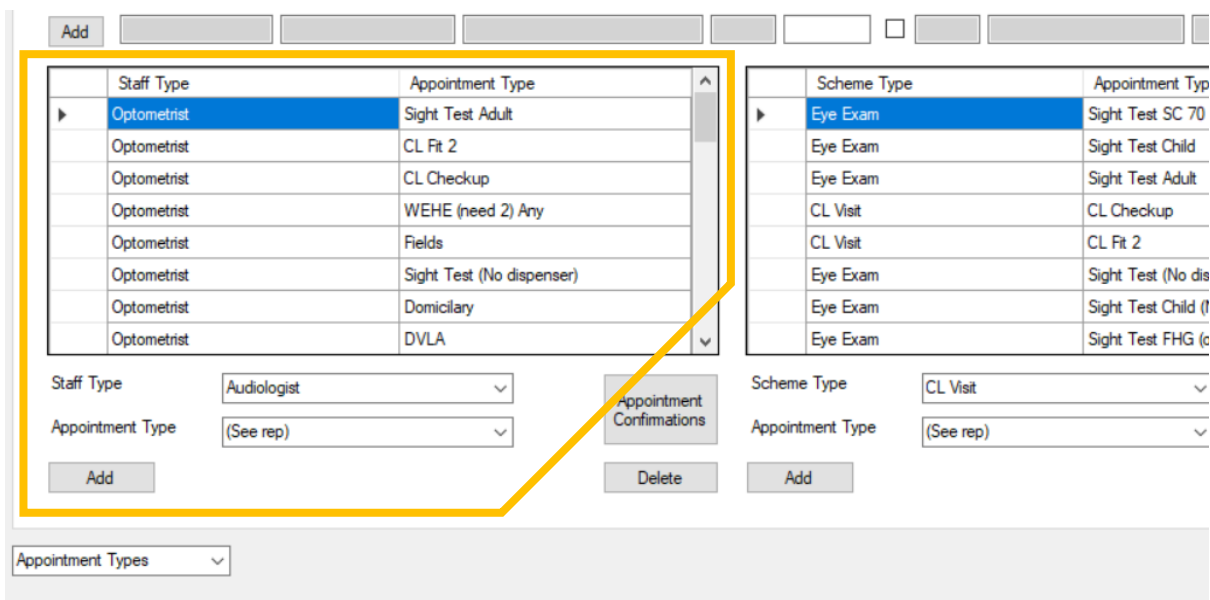


Assigning appointments to users

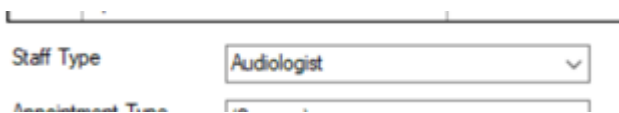
Once the appointment type has been added it needs to be assigned to a staff type. This allows you to control which appointments appear in which Clinicians appointment clinics. (If you have not already added your staff types, please see the “User Set Up” manual and go to the “Staff Types” section.)

Navigate to the Appointment Types tab in the maintenance module.

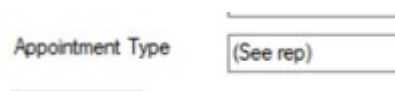
Assigning appointments to staff types is done on the bottom left hand section of the screen.



1. Select the staff type from the drop-down list.



2. Select the appointment type from the drop-down list



3. Click Add

Add

Continue with this process so each staff type that has a clinic is linked to each appointment type it can perform. *Appointment types can be linked to more than one staff type.*

You now need to assign each appointment to a scheme. Scheme types link appointments to recalls, forms and record printing. An appointment type assigned to the scheme type Eye Exam, will mean during clinic preparation if the patient is entitled to an NHS exam a GOS1 form will be printed. It also means that an eye exam paper record will be printed (rather than a contact lens paper record)

The scheme type to appointment type link is also important if you have the feature 'arrival resets recall turned on (branches tab). If this feature is turned on when a patient attends an appointment the system checks the scheme type linked to the appointment, if the patient has a recall communication in the pending communications section of their record of the same scheme type it will automatically update their communication send date. This is a failsafe so that if the patients recall does not get updated the patient does not receive a recall reminder shortly after attending an appointment.

The screenshot shows a patient record for Miss Hannah Dubberley. The 'Appointments' tab is active. There is a checkbox for 'Stop All Recalls' and two appointment date fields: 'Last Booked Appointment' (24/01/2020) and 'Next Booked Appointment'. On the left, a list of 'Recall Schemes' includes '[ST] 12 months' (selected), '[CL] CEC C Lens Wearer', '[CL] CL12', '[CL] CL24', '[CL] CL6', '[CL] OS CL Wearers (Eyeplan)', and '[CL] OS CL Wearers (Saulfon)'. On the right, a table titled 'Communications Pending' shows one entry:

Recall Scheme	Sequence No	Send Date	Communication Stage
[ST] 12 months	1	28/May/2021	12 months Stage 1

A yellow arrow points from the 'Send Date' column of the table to the '12 months' part of the selected recall scheme in the list.

In the maintenance module navigate to the Appointment Types tab. Scheme type link set up is located on the bottom right of the page.

Staff Type	Appointment Type
Optometrist	Sight Test Adult
Optometrist	CL Fit 2
Optometrist	CL Checkup
Optometrist	WEHE (need 2) Any
Optometrist	Fields
Optometrist	Sight Test (No dispenser)
Optometrist	Domiciliary
Optometrist	DVLA

Scheme Type	Appointment Type
Eye Exam	Sight Test SC 70
Eye Exam	Sight Test Child
Eye Exam	Sight Test Adult
CL Visit	CL Checkup
CL Visit	CL Fit 2
Eye Exam	Sight Test (No dispenser)
Eye Exam	Sight Test Child (No dispenser)
Eye Exam	Sight Test FHG (over 40)

Staff Type: Appointment Confirmations:

Appointment Type:

Scheme Type:

Appointment Type:

1. Select the scheme type that the appointment will belong to from the drop-down list.

Scheme Type

2. Select the appointment type from the drop-down list.

Appointment Type

3. Click add.

Custom appointment lengths

You may have a user who needs a different amount of time to carry out an appointment to the one that the appointment is set to. E.g. You may set an eye exam to be 30 minutes but your pre-reg optometrist may need 45 minutes. In order that the correct amount of time is blocked out for the pre-reg, without users having to manually alter appointment times, you can create custom appointment lengths:

Navigate to the Misc. 6 tab in the maintenance module.

Optom	Appointment Type	Standard	Custom
Charlie Gibson	Collection	10	20
Kayleigh Felstead	Sight Test Child	20	40

Imaging Link Form Settings

1. Select the user who needs the adjusted appointment length from the drop-down list.

Charlie Gibson

2. Select the appointment that needs adjusting from the drop-down list.

(See rep) (30)

3. Type the new appointment length into the end box.

4. Click add

Add

This button is also available in the users tab.

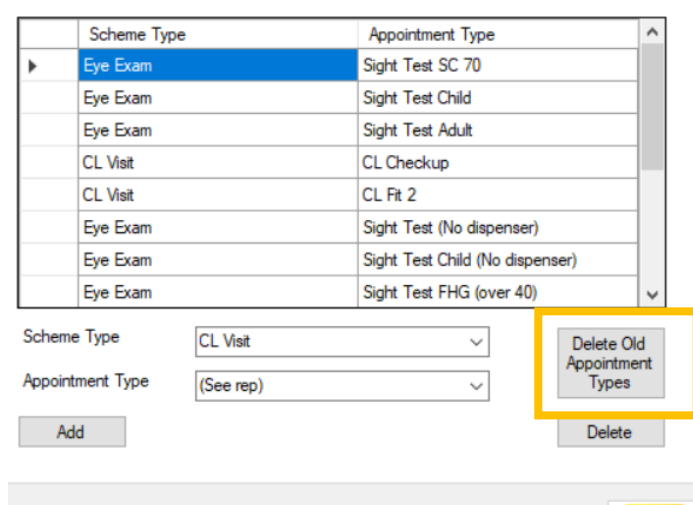
Replace appointment types

You can replace old appointment types using the “Delete old appointment types” button in the appointment types tab.

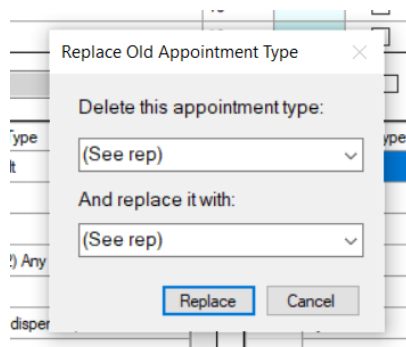
Please note: The old appointment will be renamed everywhere in the system. In patient’s appointment tabs any appointment previously booked will now appear to have been the new appointment type. Any appointments booked in the system will be renamed to the new appointment type. If you want historical appointment information to remain the same, but the appointment to no longer be available please see the “Remove appointment types” section below.

In the maintenance module, go to the Appointment Types tab.

The “Delete Old Appointment Types” button is at the bottom right hand corner:



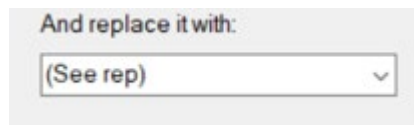
1. Click on the “Delete Old Appointment Types” button. This will open a new window.



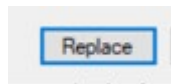
2. Select the appointment you want to replace from the dropdown list.



3. Select the appointment you would like to use to replace the old appointment from the drop-down list.



4. Click the "Replace" button.



Remove appointment types

You can stop the appointment from being booked in the future without altering any previous information. Any previous appointments of this type will still show in the patient's appointment tab. Any appointments booked but not yet completed will still show as this appointment type on the report, but if you open the appointment to edit it you will have to change to a new appointment type.

To remove an appointment type, go to the Appointment Type tab in the maintenance module.

We will be working on the bottom left hand side of the screen:

Staff Type	Appointment Type
▶ Optometrist	Sight Test Adult
Optometrist	CL Fit 2
Optometrist	CL Checkup
Optometrist	WEHE (need 2) Any
Optometrist	Fields
Optometrist	Sight Test (No dispenser)
Optometrist	Domiciliary
Optometrist	DVLA

Scheme Type	Appointment Type
▶ Eye Exam	Sight Test SC 70
Eye Exam	Sight Test Child
Eye Exam	Sight Test Adult
CL Visit	CL Checkup
CL Visit	CL Fit 2
Eye Exam	Sight Test (No dis
Eye Exam	Sight Test Child (T
Eye Exam	Sight Test FHG (c

Staff Type: Appointment Type: Appointment Confirmations

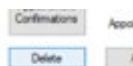
Add Delete Add

Appointment Types

1. Highlight the appointment type you want to remove by clicking on it. The arrow shows which appointment and staff type link you are editing.



2. Click delete

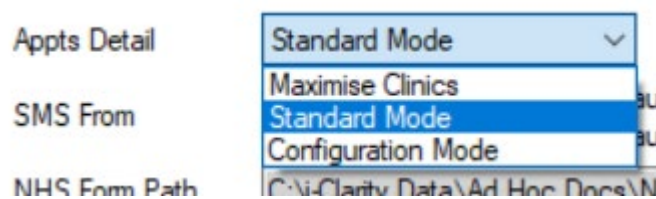


Additional appointment configuration options

Default appointment view

There are three layouts of the appointment's module; configuration mode, standard mode, and maximise clinics. You can switch between these modes from within the appointment's module, but you can set a default mode for each practice, so when the appointments module is opened you get the layout you prefer.

In maintenance, go to the Branches tab select your default mode from the Appt Detail dropdown list:



Maximise clinics

This shows only the clinics on the page, they are extended to their maximum length. This default is useful for practices who have clinics that start at 9am and extend past 5.30pm.

09:00	
10:00	
10:30	
10:30	
11:00	
12:00	
13:00	* Lunch Break
14:00	* Training
15:00	* Training
16:00	* Training
16:40	* Training

Config mode

This shows the clinics but they are shortened in length so will have a scroll bar, a notes section below each clinic and the clinic editing functions.

The screenshot displays a grid of clinic slots in Config mode. Each slot is a small table with a time slot on the left and a description on the right. For example, one slot shows '13:00 Lunch Break' and another shows '11:00 Dickens Mr R'. Below the grid, there are several tabs labeled 'His.', 'GOS', 'Crds', and 'Sms'. Underneath these are dropdown menus for appointment types, such as 'Standard day with no dispenser' and 'Delyth - day with no dispenser'. At the bottom, there are various control buttons including 'Add Clinic', 'Go To Patient's Next Appointment', 'Go To Last Booked Appointment', 'Delete Thu 31 Mar 2011 - Mrs Sara Ward', 'Duplicate Selected Clinic To', 'AM / PM', 'Multi-Duplicate', 'Duplicate Block', 'Go To Today', 'Split Appointment', 'View Patient', 'Append', 'Add to Start', and 'Overview'. There are also date and time pickers for selecting a specific appointment.

Standard mode

This shows the clinics as a standard length and the notes sections below each clinic.

The screenshot shows a single clinic slot in Standard mode. It consists of a table with a time slot on the left and a description on the right. The time slots shown are '13:00 Lunch Break', '14:00 Reserved', '15:00 Reserved', '16:00 Reserved', and '17:00 Reserved'. Below the table, there are tabs labeled 'His.', 'GOS', 'Crds', and 'Sms'. Underneath these is a dropdown menu for appointment types, currently set to 'Standard day with no dispenser'. At the bottom, there is a button labeled 'Go To Patient's Next Appointment'.

Minimum appointment length

You can set a minimum appointment length in the Misc. tab.

This then does not allow a user to book an appointment in a slot less than the inputted amount of time.

Minimum Appointment Length



Allow Users to Modify GP Records

Automatically adjust appointment length

There may be times when you have an appointment type that is longer or shorter than time intervals available on the system e.g. Your clinic may be laid out in 30-minute intervals, but you may have a 20-minute or 40-minute appointment. You can choose how the system handles this situation with the “automatically adjust appointment length” check box.

Navigate to the Misc. tab in the Maintenance module.

If the checkbox is ticked:

When you book an appointment that is different in length to the slot you are booking it into, you will get a warning that the appointment isn't of optimal length, then the system will take some time from the following appointment slot in order to block the correct amount of time out of the clinic, or if the appointment is shorter it will leave a smaller slot of time available to be booked.

Fri 03 Apr 2020		Rpt
09:00	Test Mrs K	
09:40		
10:00		
10:30	Test Miss T	
11:00		
11:30		
12:00	Test 5 Mr S	
12:30	Test 5 Mr S	
13:00	* Lunch Break	

With the check box ticked the 40-minute appointment and 20-minute appointment slots have been adjusted

If the checkbox is unticked:

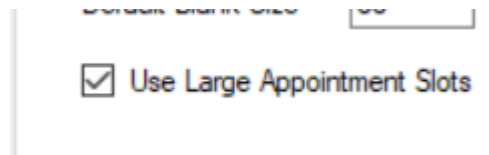
When you book an appointment that is different in length to the slot you are booking it into, you will still get a warning that the appointment is not of optimal length, but the system will only block out the original time slot, so if you booked a 40-minute appointment into a 30-minute slot, only 30 minutes would be blocked out for that appointment, the slot would turn pink to notify you that you has less time to complete the appointment than was intended.

11:00		
11:30		
12:00	Test 5 Mr S	
12:30	Test 5 Mr S	
13:00	* Lunch Break	

With the check box unticked the 40-minute and 20-minute appointment slots are not adjusted. Both remain in 30-minute slots.

Use large appointment slots

In Misc. 3 there is a “use large appointment slots” check box.



If this is unticked, then the space per appointment slot is smaller to keep a whole clinic on one page without the need to scroll to get to the later appointments. If the box is ticked the appointment slots are larger but you do need to scroll down to see what appointments are available later in the day:

Both clinics have 30-minute intervals but this clinic on the left has the box ticked so the slots are larger, and you must scroll to see the later part of the clinic.

Both clinics have 30-minute intervals but this clinic on the right has the box unticked so the slots are smaller and the whole day can be viewed at once.

Time	Appointment
09:00	Test Mrs K
09:40	
10:00	
10:30	Test Miss T
10:50	
11:00	
11:30	
12:00	Test 5 Mr S
12:30	Test 5 Mr S
13:00	* Lunch Break
14:00	
14:30	
15:00	
15:30	
16:00	
16:30	
17:00	

Show clinics one day at a time

In the Branches tab you will find a checkbox called “show clinics one day at a time” on the right-hand side:

ie) Test branch 0

Show clinics one day at a time

Product Cache Interval 120

If this checkbox is ticked, when you enter the appointments module, instead of seeing a block of the next seven clinics, you will only see one day at a time. E.g.

Charlie Gibson	Kayleigh Felstead				
1: GU Mon 06 Apr 2020	1: GU Mon 06 Apr 2020	Rpt	Rpt	Rpt	Rpt
09:00	09:00				
09:30	09:30				
10:00	10:00				
10:30	10:30				
11:00	11:00				
11:30	11:30				
12:00	12:00				

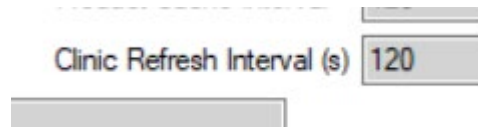
Show clinics one day at a time box is ticked.

Charlie Gibson	Kayleigh Felstead	Kayleigh Felstead	Kayleigh Felstead	Kayleigh Felstead	Charlie Gibson
1: GU Mon 06 Apr 2020	1: GU Mon 06 Apr 2020	1: GU Tue 07 Apr 2020	2: CG, GU Wed 08 Apr 2020	0 Thu 09 Apr 2020	0 Fri 10 Apr 2020
Rpt	Rpt	Rpt	Rpt	Rpt	Rpt
09:00	09:00	09:00	09:00	09:00	09:00
09:30	09:30	09:30	09:30	09:30	09:30
10:00	10:00	10:00	10:00	10:00	10:00
10:30	10:30	10:30	10:30	10:30	10:30
11:00	11:00	11:00	11:00	11:00	11:00
11:30	11:30	11:30	11:30	11:30	11:30
12:00	12:00	12:00	12:00	12:00	12:00
12:30	12:30	12:30	12:30	12:30	12:30

Show clinics one day at a time box is NOT ticked.

Clinic window refresh

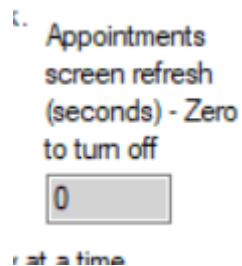
In the appointments module you can open the days clinic in a separate window so that it is available to look at without going in and out of the appointment's module. It is particularly useful for the clinician. You can set how often this window refreshes with up to date information in the Clinic Refresh Interval box in the branches tab. Put your desired refresh interval in in seconds:



Clinic Refresh Interval (s) 120

Appointment screen refresh

The appointment screen will refresh each time you open the appointments module. If the appointments module is left open, it can automatically refresh at a given interval. So, if you leave your appointment module open on one computer and someone else books an appointment, that appointment will become visible on your open appointments page when the screen refreshes. You can set how often that happens in the branches tab.



Appointments
screen refresh
(seconds) - Zero
to turn off
0

Put the refresh time, in seconds, in the box. If you put zero in to turn this feature off, an open appointments page will not reflect new appointments booked, or appointment changes until you either make a change on that computer or you exit the page.

Resources

If you have resources in your practice that are limited, you can add them to i-Clarity so that they can be assigned to an appointment. The colour of the appointment will change to reflect that the resource will be in use, so others are aware not to book another appointment at the same time with the same resource. Examples of could be if you only have one coloured overlay set, or one disabled parking space:

In the resources tab in the maintenance module, fill in the boxes from left to right.

Name	Notes	Colour
Parking		
Coloured overlay		

Add

resources

1. Type in the name of the resource.
2. Type any notes.
3. Double click in the box to open the colour palette to assign the resource a colour. We recommend that you choose contrasting colours for each of the resources where possible so that they are easily identifiable.
4. Click add.

You will now be able to select this resource in the appointment booking window and the colour of the appointment will change to match the resource to warn other users that the resource is in use.