# Appointment set up

i-Clarity Version 3.2.9

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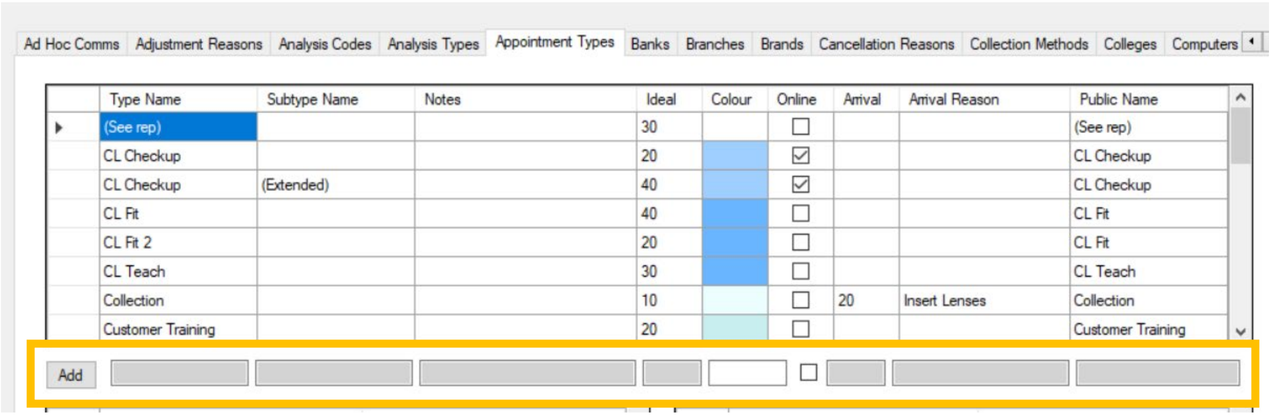
# Appointments

## 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 | | ☐ | | | (See rep) |
| CL Checkup | | | 20 | | ☑ | | | CL Checkup |
| CL Checkup | (Extended) | | 40 | | ☑ | | | CL Checkup |
| CL Fit | | | 40 | | ☐ | | | CL Fit |
| CL Fit 2 | | | 20 | | ☐ | | | CL Fit |
| CL Teach | | | 30 | | ☐ | | | CL Teach |
| Collection | | | 10 | | ☐ | 20 | Insert Lenses | Collection |
| Customer Training | | | 20 | | ☐ | | | Customer Training |

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.

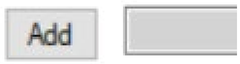
6. (Optional) Check the checkbox if you want the appointment type to be bookable by patients online.

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 that 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.

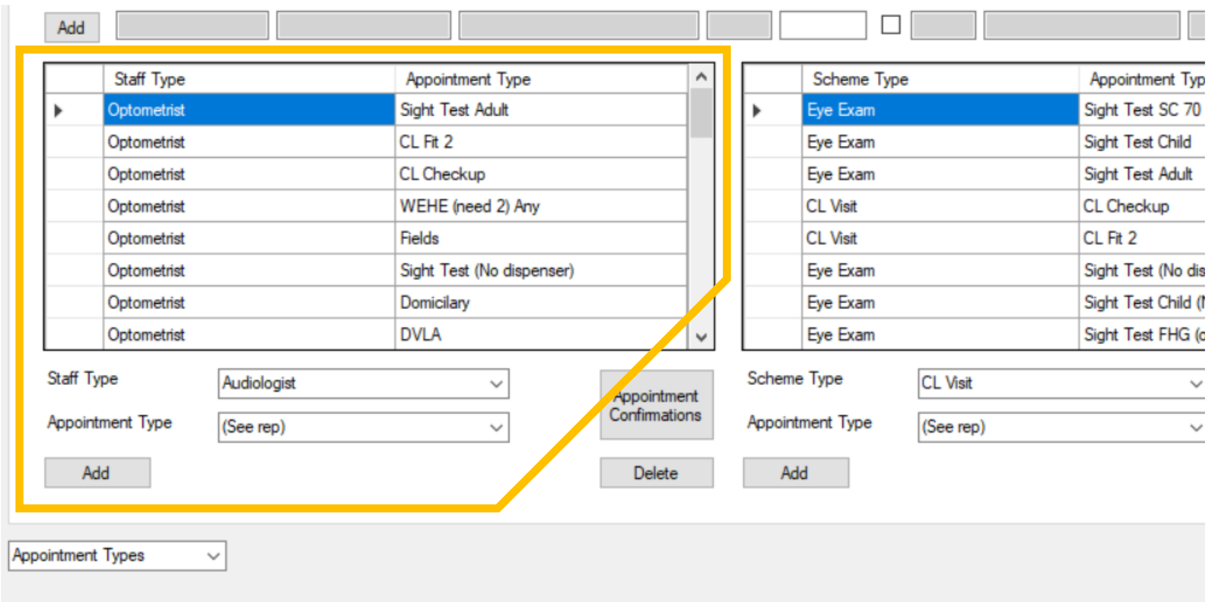
Once all the relevant boxes are filled in click add 


## Assigning appointments to users

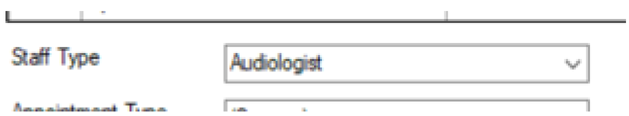
Once the appointment type has been added it needs to be assigned to a staff type. This allows you to control which appointments appear in which Clinicians appointment clinics. (If you have not already added your staff types, please see the "User Set Up" manual and go to the "Staff Types" section.)

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.



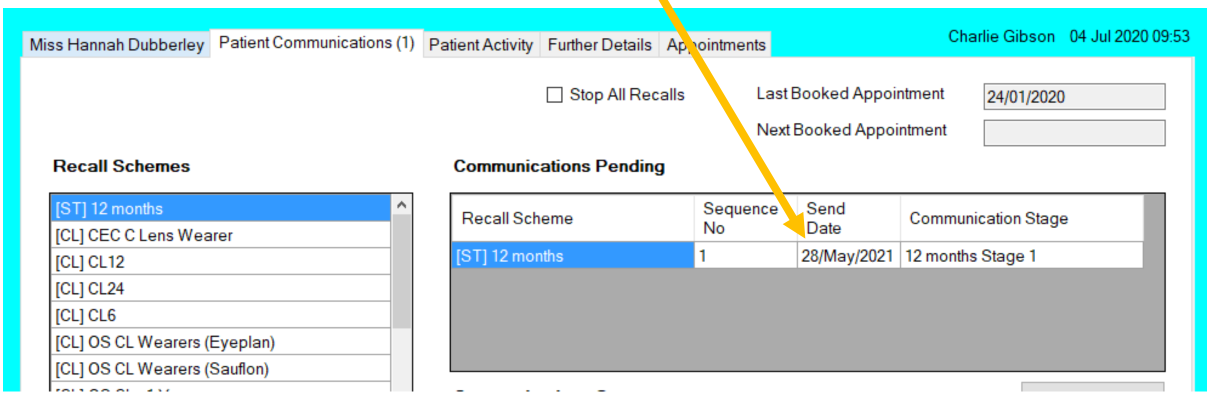

2. Select the appointment type from the drop-down list


3. Click Add

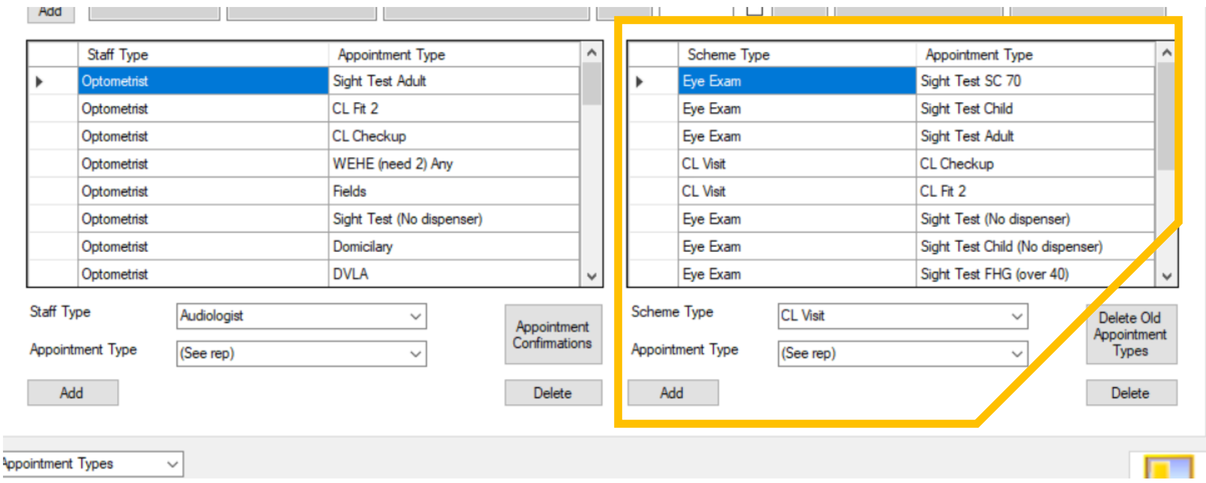

Continue with this process so each staff type that has a clinic is linked to each appointment type it can perform. *Appointment types can be linked to more than one staff type.*

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 printer (rather than a contact lens paper record)

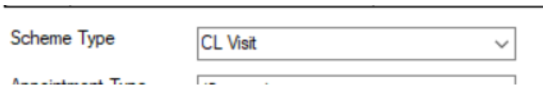
The scheme type to appointment type link is also important if you have the feature 'arrival resets recall turned on (branches tab). If this feature is turned on when a patient attends an appointment the system checks the scheme type linked to the appointment, if the patient has a recall communication 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.




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




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



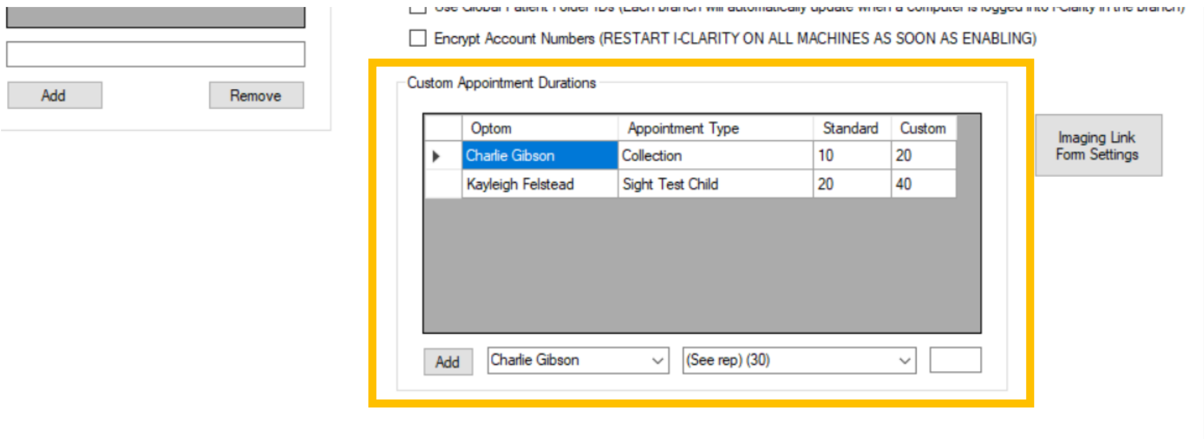

2. Select the appointment type from the drop-down list.


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:

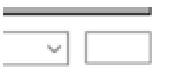
Navigate to the Misc. 6 tab in the maintenance module.




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


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


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



4. Click add


*This button is also available in the users tab.*

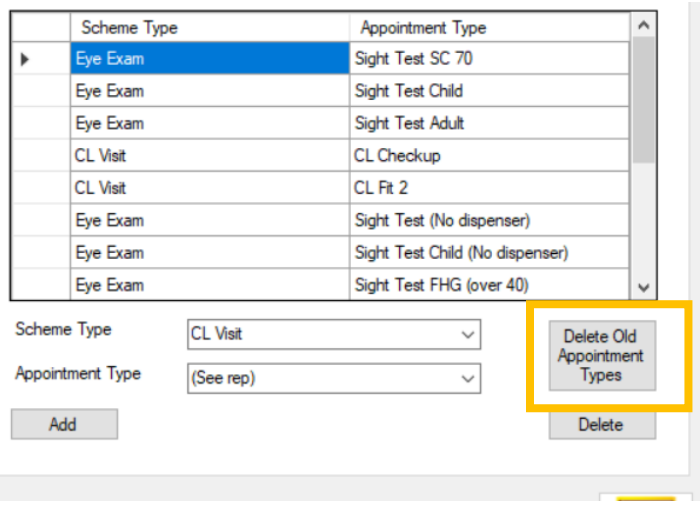
## Replace appointment types

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

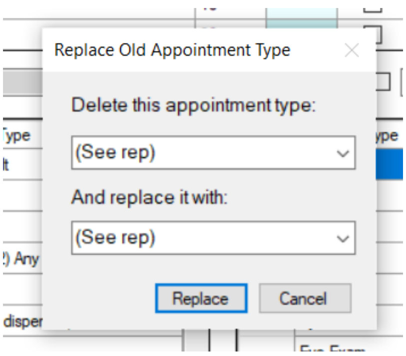
***Please note:*** *The old appointment will be renamed everywhere in the system. In patient’s appointment tabs any appointment previously booked will now appear to have been the new appointment type. Any appointments booked in the system will be renamed to the new appointment type. If you want historical 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.

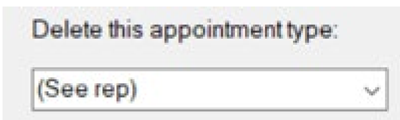
The “Delete Old Appointment Types” button is at the bottom right hand corner:



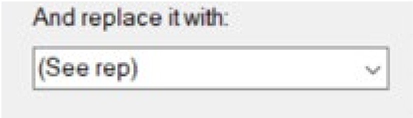

1. Click on the “Delete Old Appointment Types” button. This will open a new window.




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.



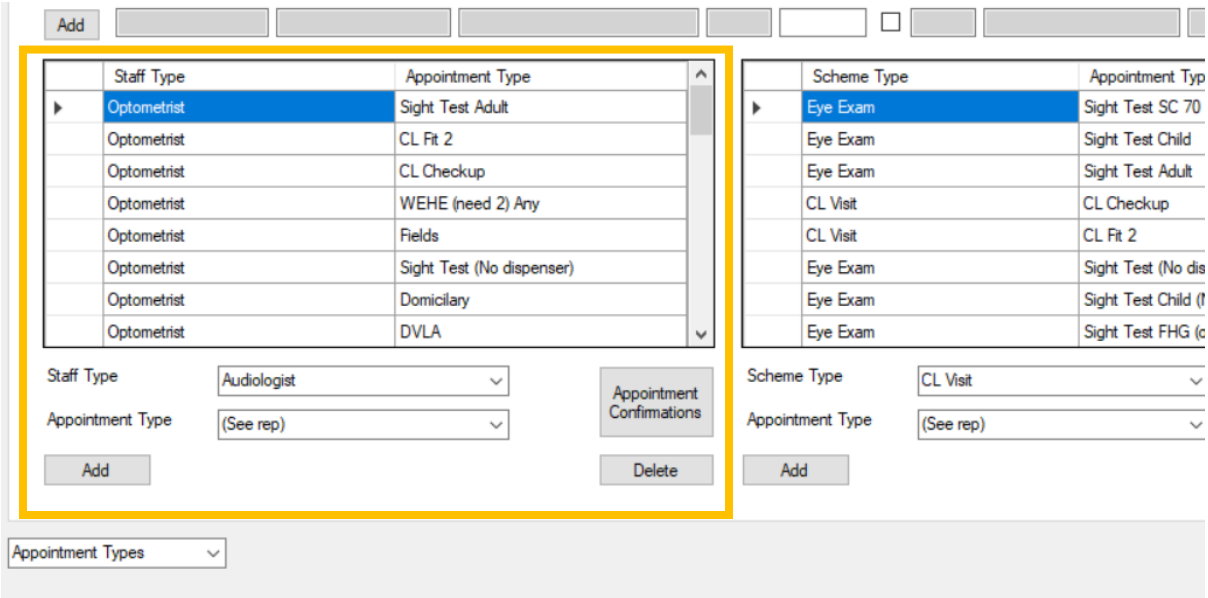

4. Click the “Replace” button.

<u>Remove appointment types</u>

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:




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.

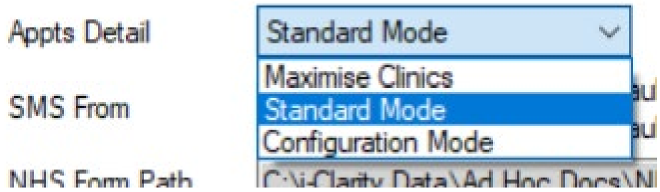

2. Click delete

## 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:

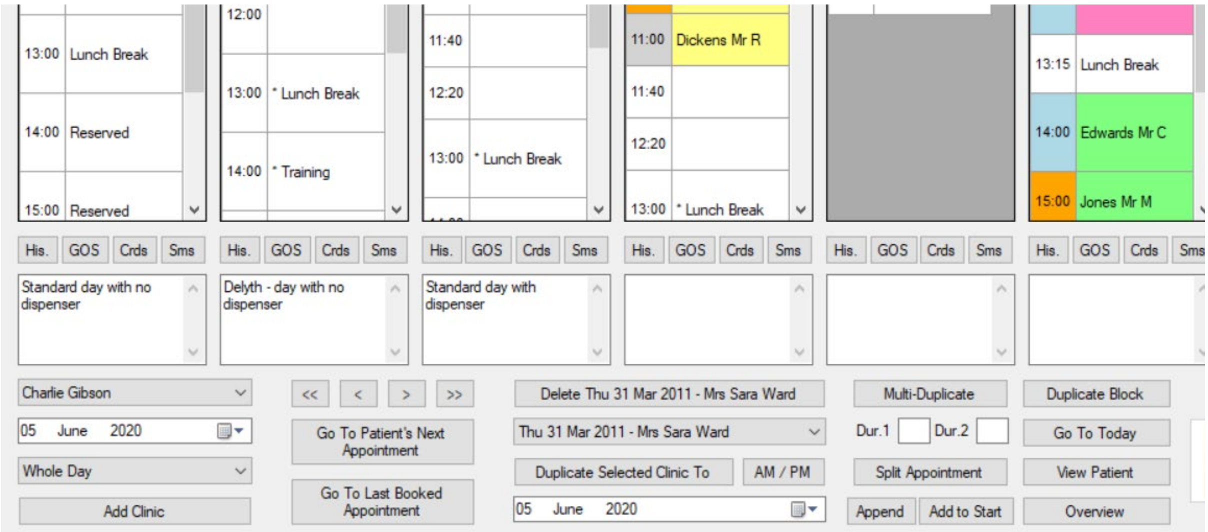



### Maximise clinics

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.

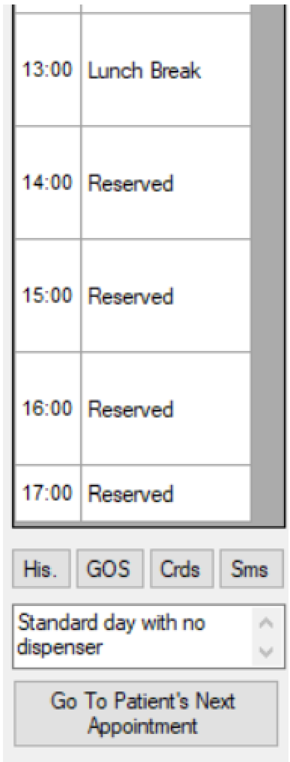
## Config mode

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.




## Standard mode

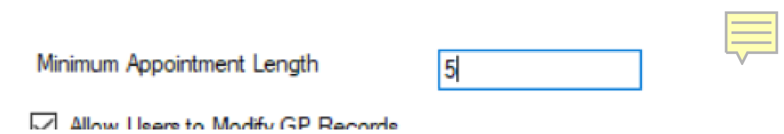
This shows the clinics as a standard length and the notes sections below each clinic.




## 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.



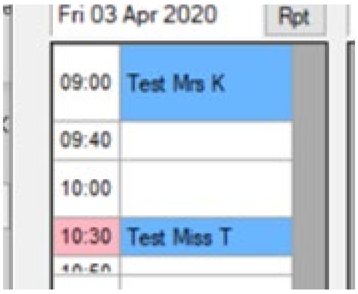
Automatically adjust appointment length

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:

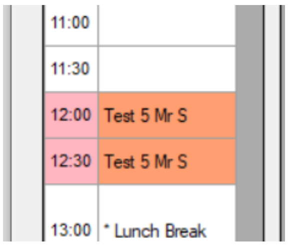
When you book an appointment that is different in length to the slot you are booking it into, you will get a warning that the appointment isn't of optimal length, then the system will take some time from the following appointment slot in order to block the correct amount of time out of the clinic, or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




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.

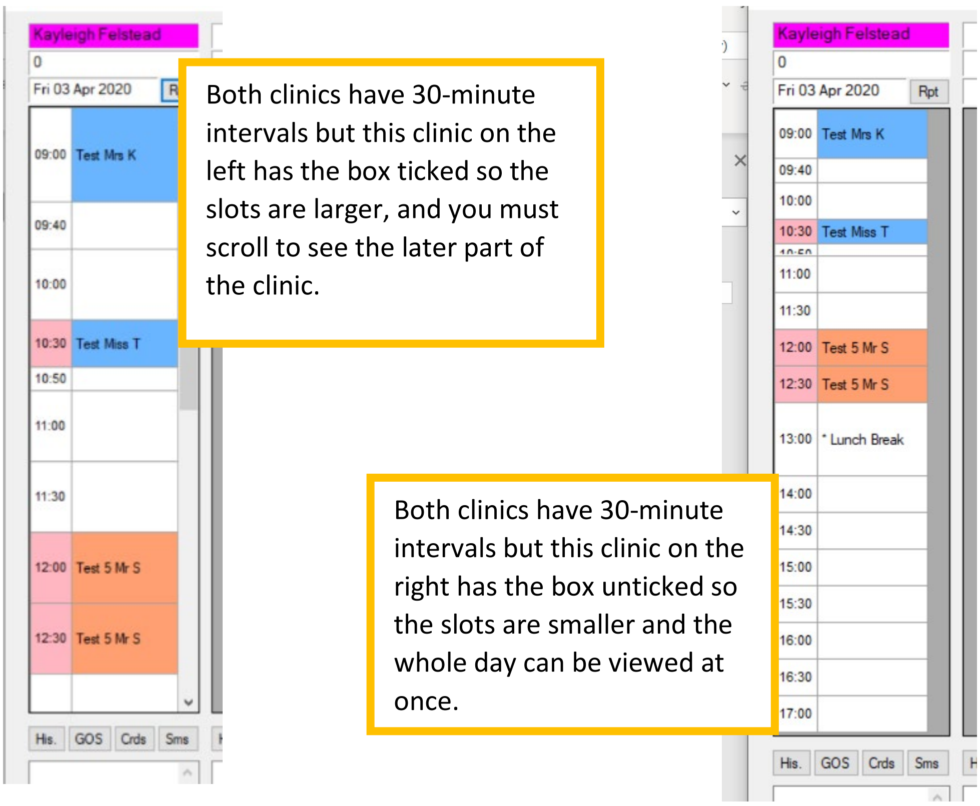



With the check box unticked the 40-minute and 20-minute appointment slots are not adjusted. Both remain in 30-minute slots.

Use large appointment slots

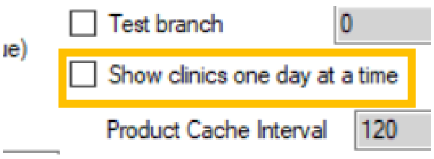
In Misc. 3 there is a “use large appointment slots” check box.


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:

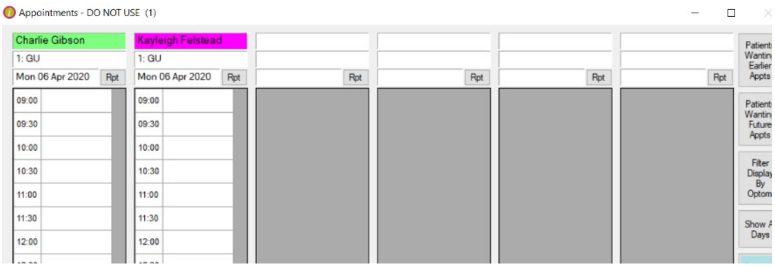


Show clinics one day at a time

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




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.




Show clinics one day at a time box is ticked.

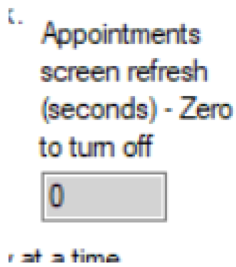

Show clinics one day at a time box is NOT ticked.

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:


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.

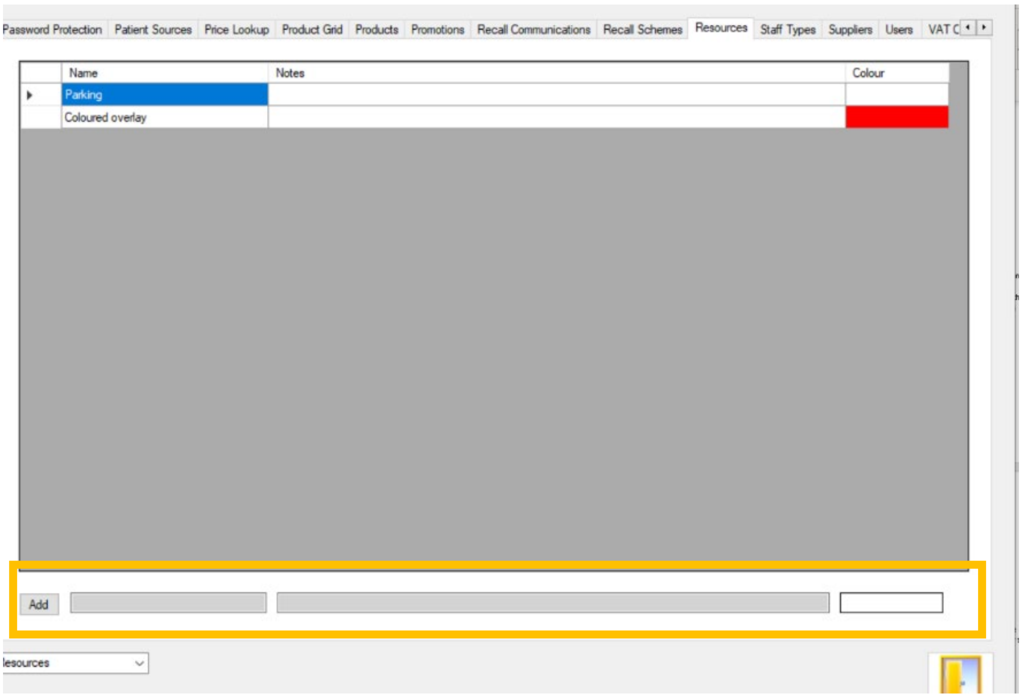



Put the refresh time, in seconds, in the box. If you put zero in to turn this feature off, an open appointments page will not reflect new appointments booked, or appointment changes until you either make a change on that computer or you exit the page.

## 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.




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.