

To Set Up Appointment for a New Optometrist

1. Go to Optometrist/Doctor/Dispenser's Details under Maintenance, create a New record for the new optometrist:
 - a. enter "Y" at the "Appointment (Y/N)" near the bottom of the screen
 - b. select an "Appointment Colour" by pressing F5.

2. Go to Appointment Setup under Maintenance, create New Templates for that optometrist, by:
 - a. Click onto the "Create New Templates" button.
 - b. At "Optometrist", select the new Optometrist Code just created. (*Select ***** for all optometrists*)
 - c. Enter the "Open At" time and "Close At" time.
 - d. Enter the "Duration".
 - e. Click onto the "Slot days". (*Do the days that have the same hours together*)
 - f. Click onto the "Create" button.
 - g. The list created will be displayed at the left hand side of the screen. Check to see if they are correct. If there is any mistake, you can edit by highlighting it and then click onto "Edit One Template". Or you can delete it by selecting "Delete One Template".
(*Note: If there are a lot changes to be made in the appointment templates, sometimes it may be easier to delete all of them and re-do them all. Just make sure you "Pack Appointment Templates" after deletion.*)
 - h. Repeat step a to g for other days or other optometrists.
 - i. When finished, press Close to exit.

3. Go to the Appoinment screen (e.g. by selecting Appointment in the Quick Menu)
 - a. click onto the "Optom" button underneath the black weekly appointment screen. The Optometrist Display Combination screen will appear.
 - b. Highlight the row or roster you want to modify and click Modify.
 - c. Click onto the ↓ on right hand side of the box you want to change or set up. An optometrist list will appear. Select the new optometrist code from the list and then click OK.
 - d. Then highlight the row or roster you want and click Select

To Remove Appointment Setup of an Old Optometrist

1. Go to Appointment Setup under Maintenance, delete the templates for that optometrist by:
 - a. highlighting the one you want to delete at the template list and then clicking “Delete One Template”. Then repeat for every templates you want to delete;
or
Click onto “Delete Bulk Templates”. Select the optometrist and days and then click onto the “Delete” button.
 - b. The rectangular box in front of the template at the list will then turn black, indicating that the template has been deleted. *(Clicking onto the black box can clear or un-delete it.)*
 - c. When finish deleting *(all the ones you want to delete are marked black)*, click onto “Pack Appointment Templates” to completely remove them off the list. *(Note: you must exit out of the Appointment screen in all computers before packing. Once deleted templates have been packed, you will not be able to undelete them anymore)*
 - d. When finished, press Close to exit.
2. Go to the Appointment screen *(Optional)*
 - a. Click onto the “Optom” button underneath the black weekly appointment screen. The Optometrist Display Combination screen will appear.
 - b. Highlight the row or roster you want to modify and click Modify.
 - c. Click onto the ↓ on right hand side of that optometrist. An optometrist list will appear. Select the blank one at the bottom of the list or replace it with a different optometrist. Then click OK.
 - d. Highlight the row or roster you want and click Select. That optometrist will disappear from the Appointment screen.

Note: Once an Optom Code been taken out of the “Optometrist Display Combination”, all appointments made for that optometrist, past or future, will NOT appear in the Appointment screen. Therefore, it may be wise to leave the old Optom Code in the Appointment screen for a little while for looking back old appointments, or at least after you move all his future appointments to another optometrist.
3. Go to Optometrist/Doctor’s Details under Maintenance
 - a. Click onto List to select the optometrist
 - b. Modify to change the “Appointment (Y/N)” to “N”.