Appointment Calendars

January 2020

Table of Contents

Appointment Calendar

The Appointment Calendar is a tool that helps pharmacies manage and organize patient appointments within the Kroll application. Appointments can be made for a wide variety of service such as Flu Shots, Immunizations, and Medication Reviews, and can also be used to coordinate staff activities such as shifts, break times, and vacation.

You must have Kroll V10 SP9 or higher to use this functionality.

Calendar Screen Explained

The Appointment Calendar is accessed by selecting the **Calendar** tile from the **Alt+X - Start** screen. The tile count indicates the number of remaining appointments scheduled for today.

Calendars

Each configured calendar will appear in the bottom left corner of the **Calendar** screen. Place a checkmark next to the calendars whose appointments you want to view. If **Combined** is not enabled, a column for each selected calendar will display.

If **Combined** is enabled, the **Calendar** screen will display all scheduled appointments associated with each selected calendar.

Date Views

The dropdown menu in the top right corner of the **Calendar** screen allows you to select a **Month view**, **Week view**, or **Day View**. In each view, you can use the arrow buttons in the top left corner of the screen to select a different month, week, or day.

Month view:

Week view:

Day view:

If you click the **Today** button, the Calendar will highlight today's date in each displayed calendar:

Virtual Consultation Appointments

This section explains how to create, modify, and delete virtual consultation appointments, and how to launch scheduled services directly from the Calendar.

Configuration

A Kroll representative must provision the section of **File** > **Configuration** > **Store** > **Interfaces** > **Pharmacy Link** and enable all of the options shown in the below.

Setting up a Virtual Consultation Appointment
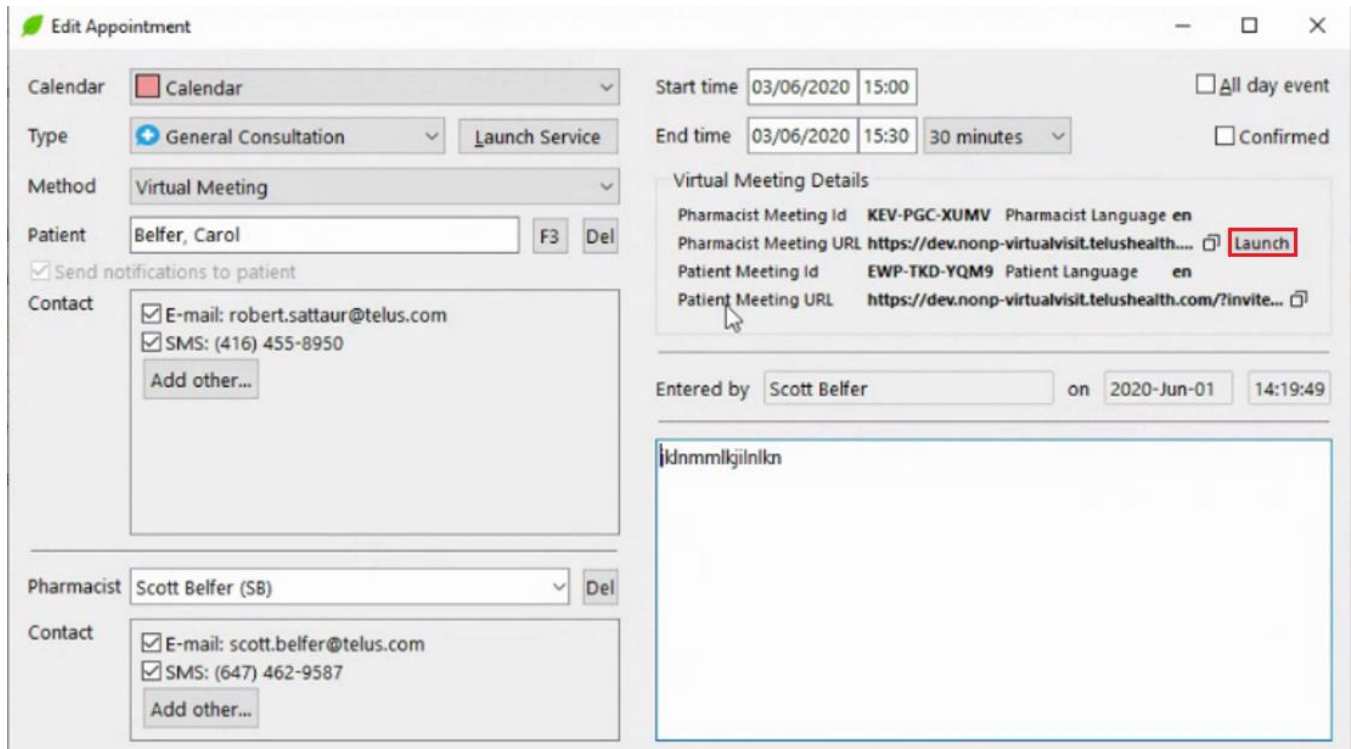
1. Select the Calendar tile from the Kroll Start Screen.

2. Click **New** or double click on the applicable calendar date.

3. The New Appointment from will be displayed. Complete the form with the information necessary including contact information for both the patient and the pharmacist. Ensure that the 'Method' is set to **Virtual Meeting**.

NOTE: If the pharmacist has their email and SMS number populated in the Users and Groups screen, their SMS and email will then be extracted from there directly into the Contact box of the Pharmacist.

4. Click Save. The appointment is now synched and will be displayed in the Calendar view and the patient will receive a confirmation message via email and/or SMS.

5. When you are ready to start the virtual consultation, simply double click on the appointment from the calendar view and click on the Launch button in the Virtual Meeting details section.

Modifying an Appointment

1. Double-click the appointment you want to modify.

2. The **Edit Appointment** form will appear. Make the necessary changes and click **Save**. The patient will receive a notification via email and/or SMS that the appointment has been changed.

Deleting an Appointment

1. Double-click the appointment you want to delete.

2. The **Edit Appointment** form will appear. Click **Delete**.

3. A prompt will appear asking if you are sure you want to delete the event. Answer **Yes**.

4. The patient will receive an email and/or an SMS stating that the appointment has been cancelled, and the appointment will be removed from the calendar.

Appointments
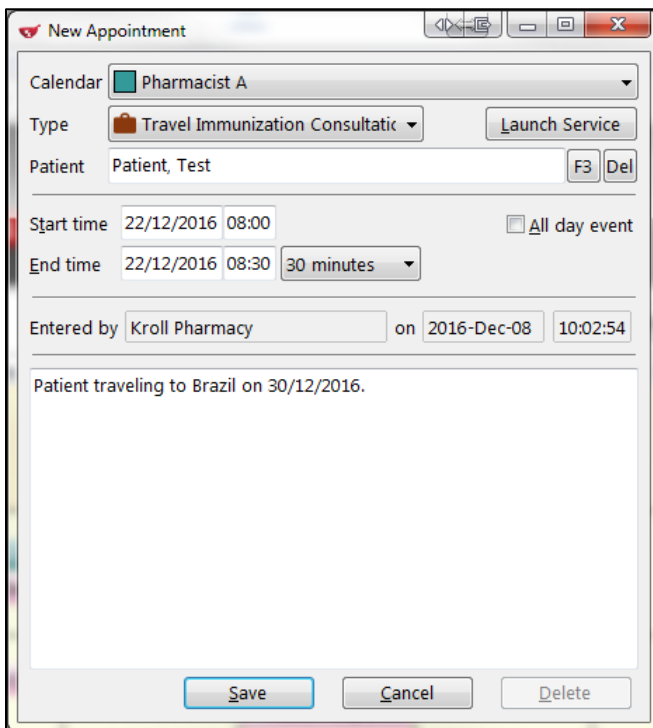
This section explains how to create, modify, and delete appointments, and how to launch scheduled services directly from the Calendar.

Inserting a New Appointment

1. Click **New**, or double-click the applicable calendar date.

2. The **New Appointment** form will appear. Complete the form and click **Save**.

- ■ **Calendar**: Select the calendar you want to assign the appointment to.

- ■ **Type**: Select an appointment type.

- ■ **Patient**: Click **F3** to optionally search for and select a patient. Once a patient is selected, the **Del** button can be used to remove the patient from the appointment.

- **Start time/End time**: Enter the start time. Select the length of the appointment from the list. The end time will update accordingly.

> **NOTE:** The appointment length defaults to 30 minutes. This can be changed in the **Store Level Configuration Parameters** > **General** screen.
>
>

- **All day event**: Check this flag if the appointment will run all day. No start or end times can be selected when this flag is enabled.

- **Comments**: Enter any comments in the space provided.

3. The appointment will be added to the calendar. Place the cursor over the appointment to see appointment details.
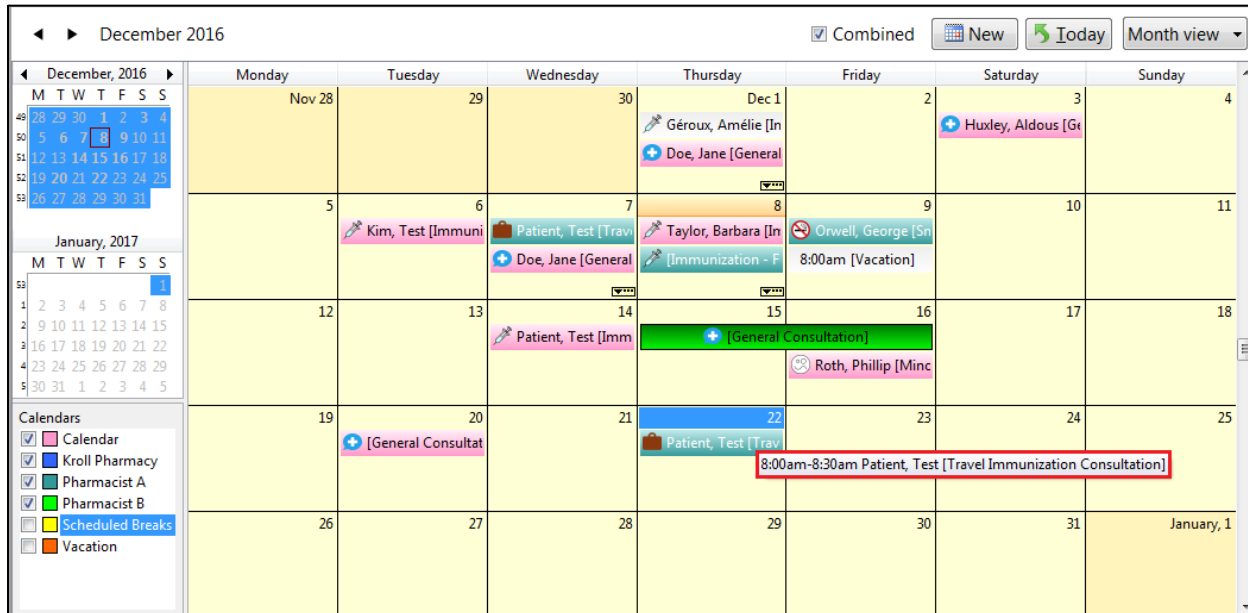
Modifying an Appointment

3. Double-click the appointment you want to modify.

4. The **Edit Appointment** form will appear. Make the necessary changes and click **Save**.
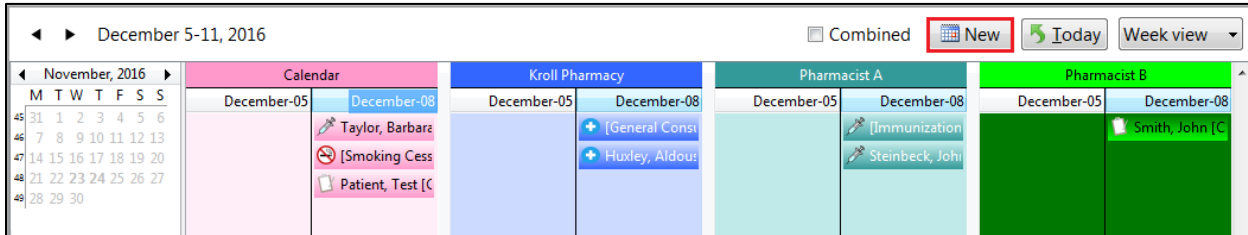
Deleting an Appointment

5. Double-click the appointment you want to delete.

6. The **Edit Appointment** form will appear. Click **Delete**.

7. A prompt will appear asking if you are sure you want to delete the event. Answer **Yes**.
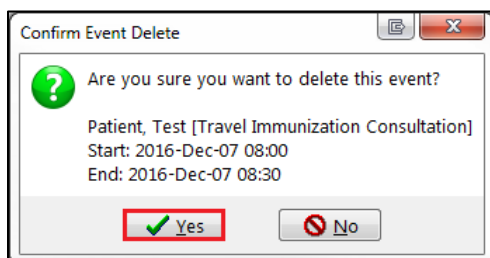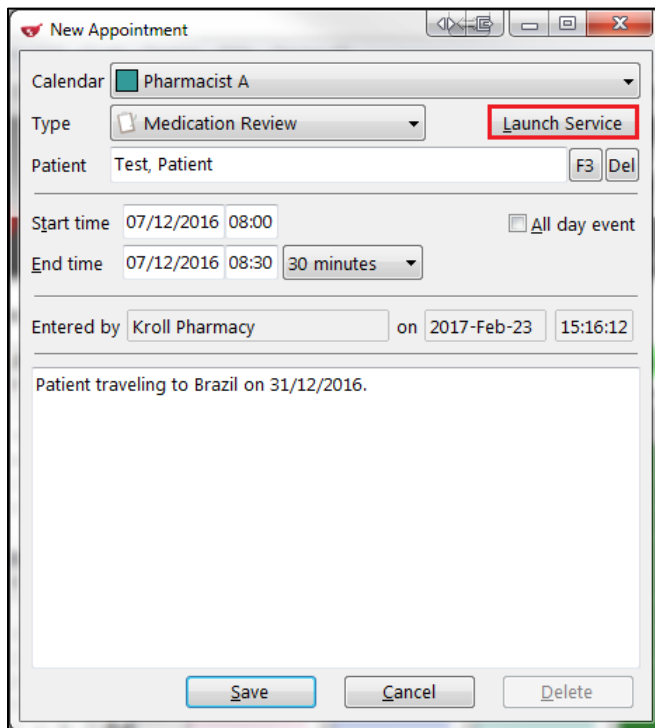
The appointment will be removed from the Calendar.

Launching a Service
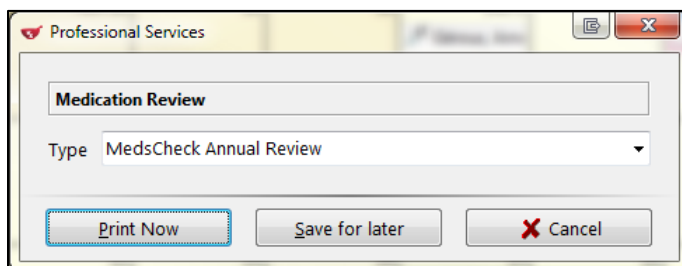
When an appointment for a service is due, the service can be launched directly from the Calendar screen.

> **NOTE:** The **Launch Service** option is only available for appointments that have a service and a patient selected.

1. Double-click the appointment from the Calendar.

2. The **Edit Appointment** form will appear. Click **Launch Service**.

3. The **Professional Services** screen will appear with the service type selected. Select a sub **Type**, if one is available, and begin performing the service.

Configuration

Appointment Calendar configuration settings can be accessed by selecting **Edit** > **Lists** from the **Alt+X - Start** screen.
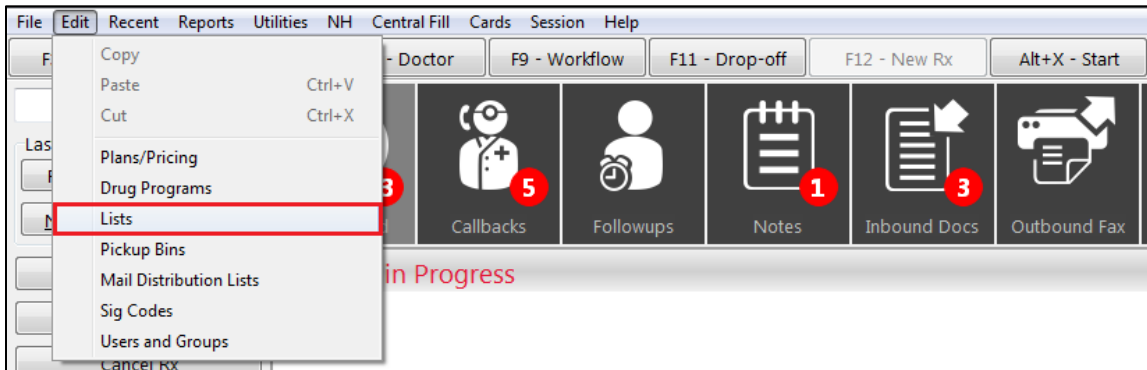
This will call up the **Edit Mast Lists / Groups** screen where Appointment Types and Calendars can be added, modified, and deleted.

Appointment Types

Select **Appointment Types** from the **Edit Mast Lists / Groups** screen. A list of configured appointment types will appear.

Inserting an Appointment Type

1. Click **Ins** or press the **Insert** key on your keyboard.

2. The **Edit Appointment Type** form will appear. Complete the form and click **Save**.

- ■ **Active**: Enable this flag to make the appointment type selectable when creating a new appointment.

- ■ **Icon**: To optionally add an icon to the appointment type, click **Select…** and locate an 16x16 pixel image file. To remove the icon from the appointment type, click **Clear**.
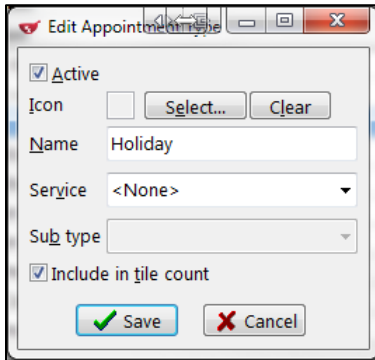
- ■ **Name**: Enter the name of the appointment type.

- ■ **Service**: Select a service associated with the appointment type. If the appointment type is not a service, leave this field blank.

- ■ **Sub type**: A sub type may be automatically selected based on your **Service** selection.

- ■ **Include in tile count**: Enable this flag to have instances of the appointment type included in the **Calendar** tile count.

The appointment type will be added to the **Appointment Types** list.

Modifying an Appointment Type

1. Select the appointment type you want to modify and click **F2**, or press the **F2** key on your keyboard.

2. The **Edit Appointment Type** form will appear. Make the necessary changes and click **Save**.

Deleting an Appointment Type

1. Select the appointment type you want to delete and click **Del**, or press the **Delete** key on your keyboard.

2. A prompt will appear asking if you are sure you want to delete the appointment type. Answer **Yes**.
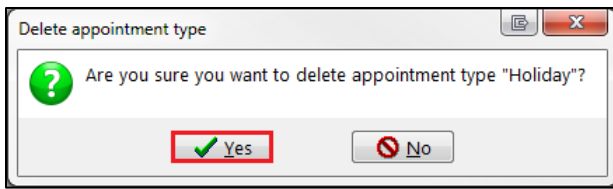
The appointment type will be removed from the **Appointment Types** list.

> **NOTE:** If there are active appointments associated with the appointment type, the following prompt will appear
> if you attempt to delete it:
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Calendars

Select **Calendars** from the **Edit Mast Lists / Groups** screen. A list of configured calendars will appear.

Inserting a Calendar

1. Click **Ins** or press the **Insert** key on your keyboard.

2. The **Edit Calendar** form will appear. Complete the form and click **Save**.

- ■ **Active**: Enable this flag to make the calendar selectable when creating a new appointment.

- ■ **Name**: Enter the name of the calendar.

- ■ **Colour**: Select the colour you want associated with the calendar. This will default to black if no colour is selected.

The calendar will be added to the **Calendars** list.
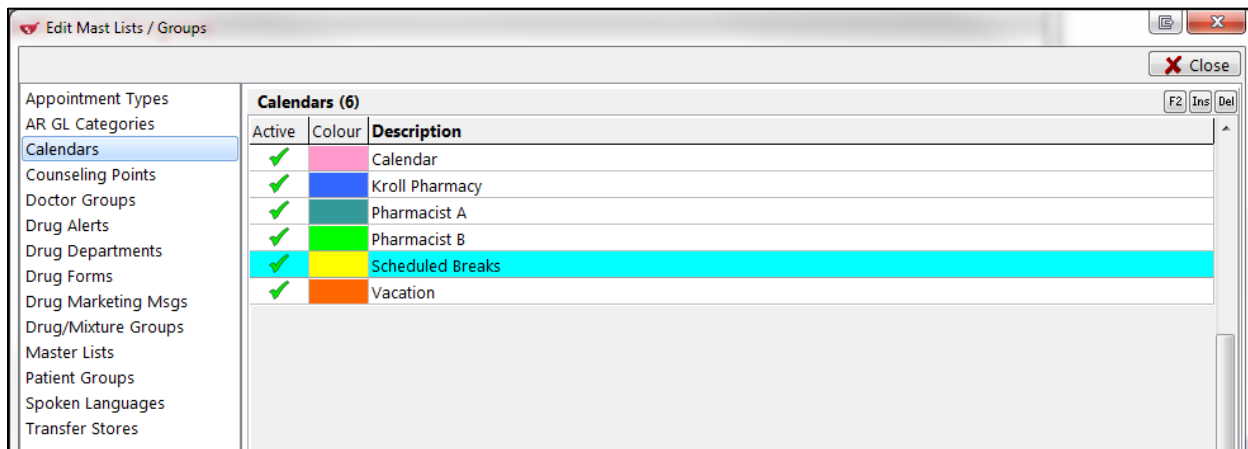
Modifying a Calendar

1. Select the calendar you want to modify and click **F2**, or press the **F2** key on your keyboard.

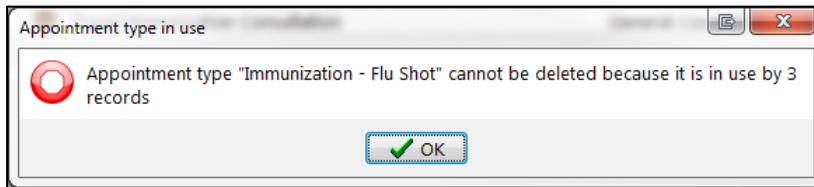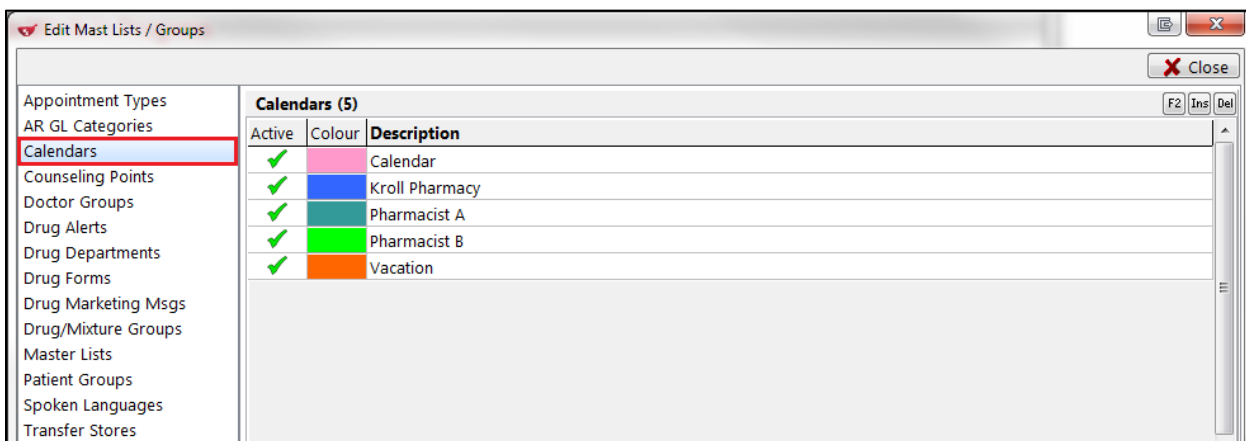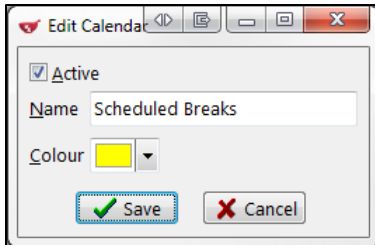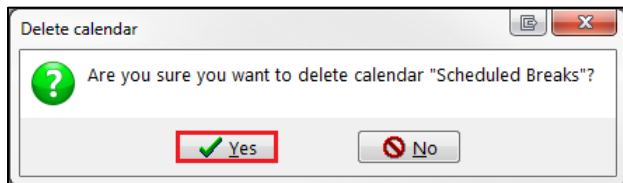2. The **Edit Calendar** form will appear. Make the necessary changes and click **Save**.

Deleting a Calendar

1. Select the calendar you want to delete and click **Del**, or press the **Delete** key on your keyboard.

2. A prompt will appear asking if you are sure you want to delete the calendar. Answer **Yes**.

The calendar will be removed from the **Calendars** list.

> **NOTE:** If there are active appointments associated with the calendar, the following prompt will appear if you attempt to delete it:
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