ONLINE PHARMACY APPOINTMENT SCHEDULER:

V3 ADMIN MANUAL

Online Pharmacy Appointment Scheduler is a mobile friendly Solution that allows you to seamlessly manage your customer appointments.

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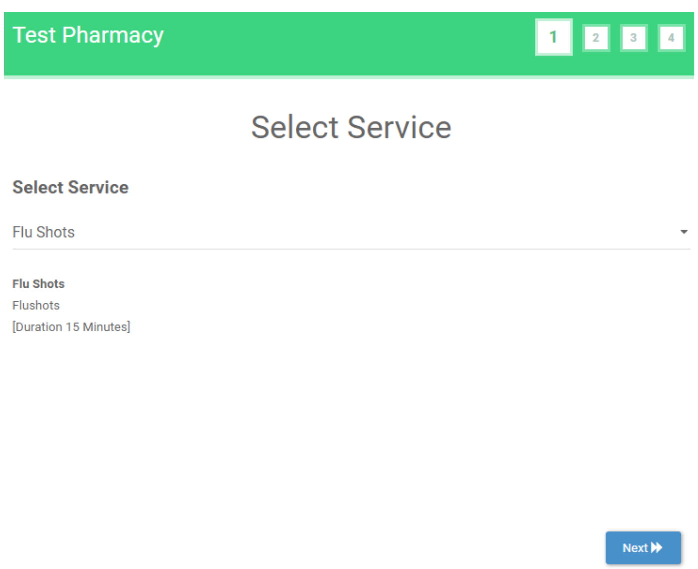
CHANGING YOUR USERNAME & PASSWORD

1. After logging in for the first time, you will need to change the Admin temporary USERNAME and PASSWORD. To do so, go to the Pharmacy/Admin tab, then Admins. Here you can change the credentials for all Admins as well as add other admins for the software. Users can also be added under the Users tab.

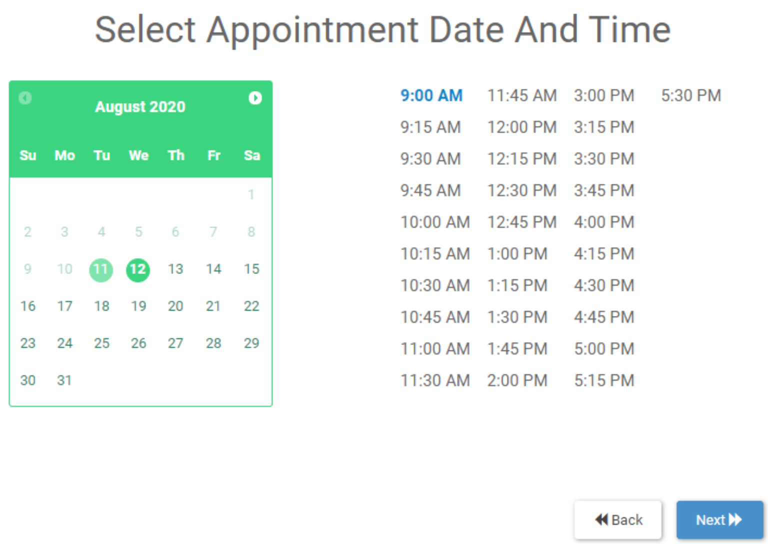
CUSTOMER EXPERIENCE-FRONTEND

Booking An Appointment

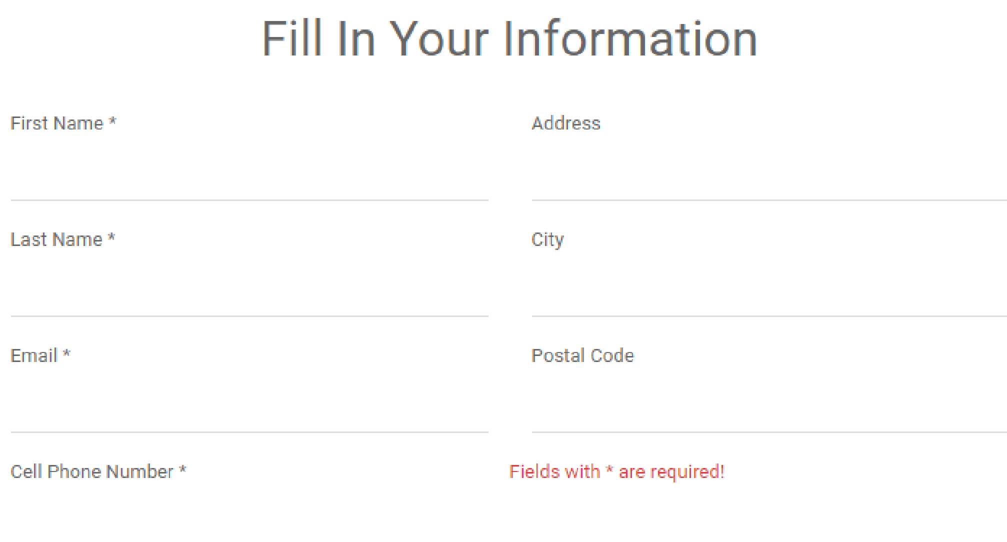
1) Customers select the service they want and click the "next" button.



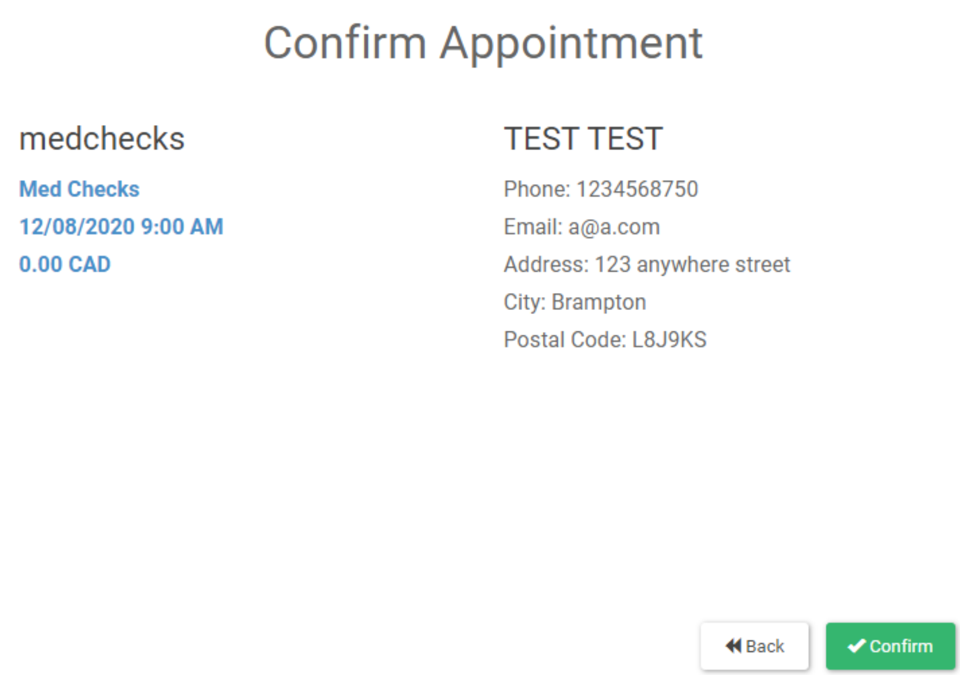
2) They then select the date and time they want to book by simply clicking on the calendar and the desired time



3) They are prompted to fill in all required fields with their personal information



4) The final step is to confirm all information is correct

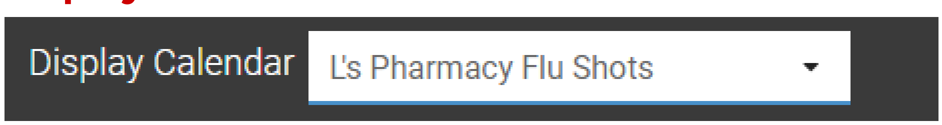


5) The customer and the pharmacy will receive an email with the appointment details. If configured, the customer will also receive an SMS text confirmation message.

PHARMACY EXPERIENCE-BACKEND

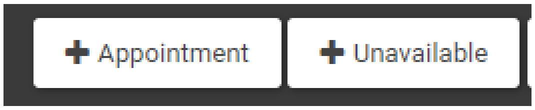
CALENDAR TAB:

Display Calendar



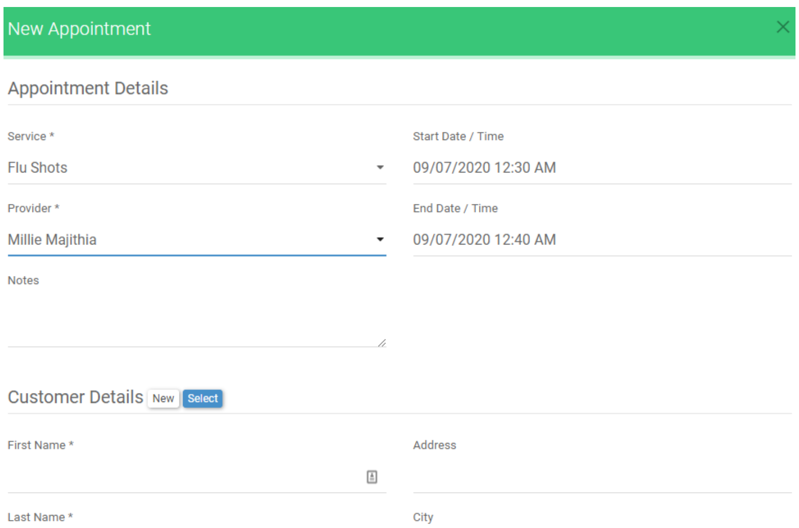
You can display the appointments by service and provider. Provider calendars will display all appointments that are booked for the specific provider. Service calendars will display all appointments that are booked for the specific service. Depending on the number of appointments in your calendar, you may want to use the Appointment Reports to print/edit/delete appointments from the scheduler. From this tab, you can see all your appointments in chronological order by service and make any necessary changes.

Book An Appointment & Select Unavailable Period



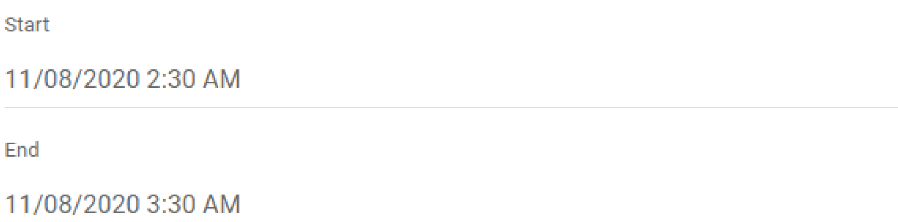
MANUALLY ENTERING A CUSTOMER APPOINTMENT

To book an appointment for your customer, click the “+Appointment” button or double click anywhere on the calendar. Fill in all necessary fields, and select the customer you would like to book for. If the customer is not already in the database select “New”



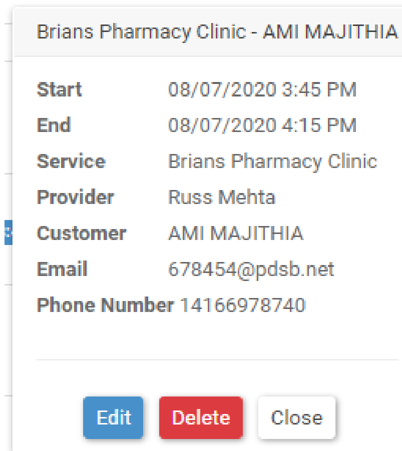
UNAVAILABLE PERIOD

To block off an unavailable period press “+Unavailable”
Add the start/end times and save.



Edit/Delete Existing Appointment

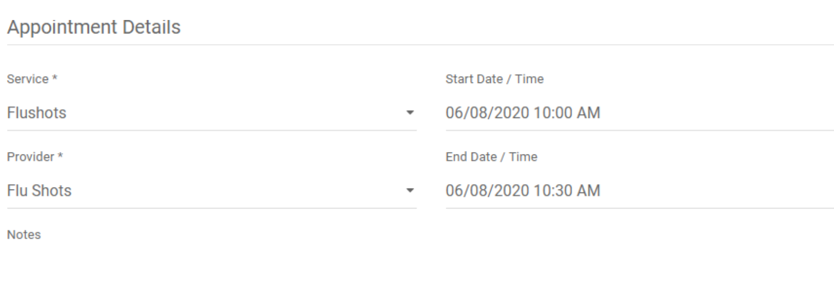
You can view the expanded details of an appointment by clicking on it in the calendar.



From here, you can edit or delete the appointment by clicking the appropriate buttons.

EDIT APPOINTMENT:

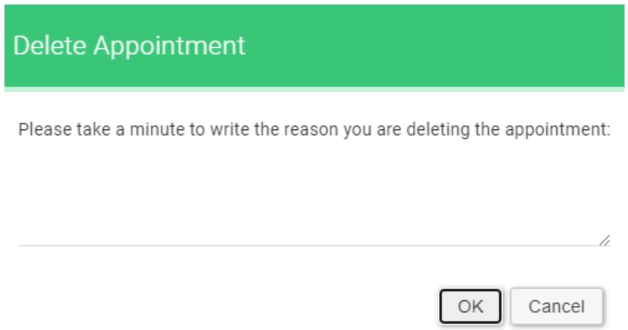
When the "EDIT" button is clicked, a pop up box is shown with the appointment information. You can make any desired changes to the applicable fields.



When editing an appointment, you can decide whether a confirmation email/SMS will be sent to the customer. To turn this communication on or off, simply toggle to your prefered setting in the " send email to customer" drop down menu in the EDIT window.

DELETE APPOINTMENT:

When the "DELETE" button is clicked, you will be prompted for the reason you are cancelling this appointment. **The message you enter here will be included in the delete confirmation email that will be sent to the customer.**

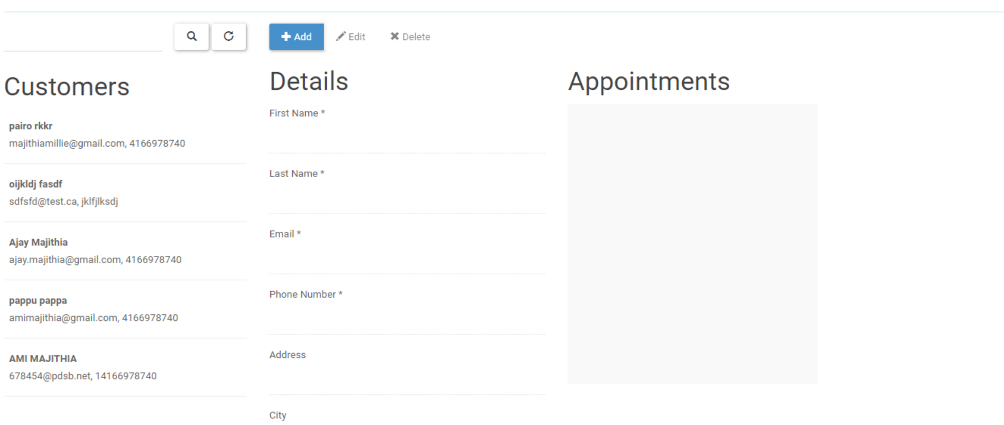


CUSTOMERS TAB:

Edit, Delete, Add Customers

With the Customer tab, you can edit, delete, and add customers and see all appointments for each customer.

When manually booking customers on the backend, there may be instances where you do not have an email for the required field. Therefore, for the customer email field on the backend only, you are able to use any combination of numbers/letters for this required field as long as each customer email has a unique letter/number combination (ex. 1, 2, 3, 1a, 2a, 2b, 3c)



To edit or delete, select an existing customer and press “edit/delete”
To add, select “add” and type in the required information.

PHARMACY/ADMIN TAB:

The Pharmacy/Admins tab is where you can manage all the credentials and information for the pharmacy users.

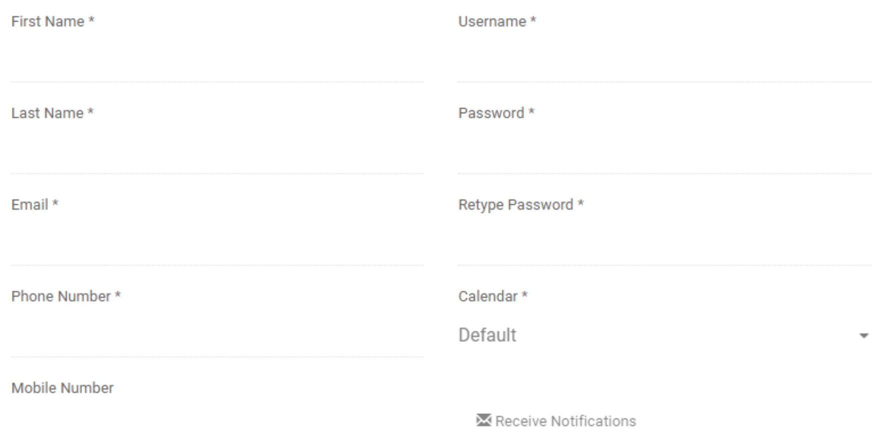
Admin and Providers

ADD, EDIT, DELETE ADMINS AND PROVIDERS

Adding, editing, and deleting providers and admins is very similar.

To edit providers -> PROVIDERS
To edit Admins -> ADMINS
To edit User -> USERS

The DETAIL fields are the same:



To receive notifications each time there is a change to the calendar, check-off the “receive notifications button” at the bottom.

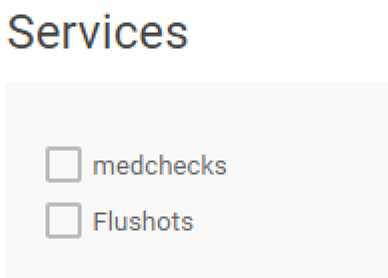
PROVIDERS:

Providers are both who and where the service takes place.

In the providers section, you must type in the pharmacist name and information.

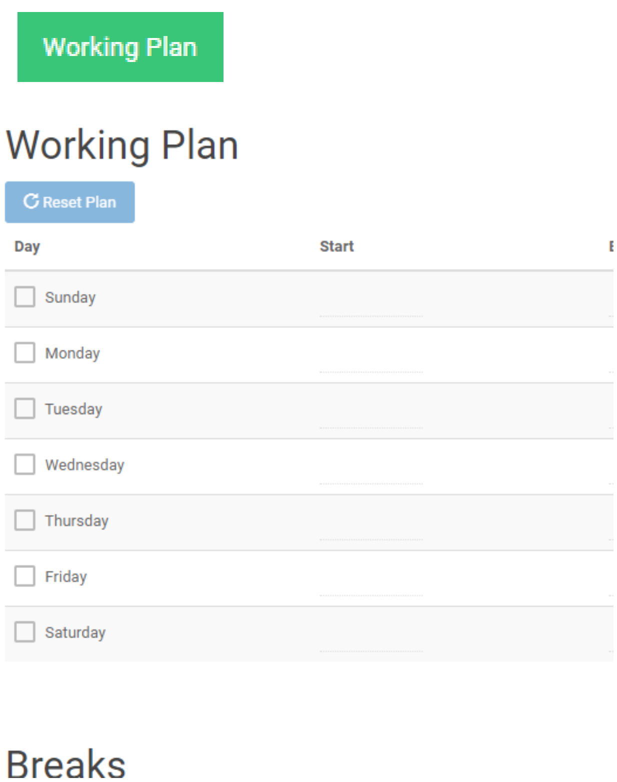
The unique ID # you associate with the service can be any unique combination of letters or numbers, (ie 1, 2, 3,) but you must ensure each service ID# is unique from the other ID#’s you use for different services in the appointment scheduler.

In the services field, check off the services for the specified provider.



A username and password can also be entered here to allow access to only specific people for that service in the appointment scheduler.

The “Working Plan” tab allows you to establish the hours and breaks that are specific to that pharmacist!



USERS:
You can also add users under the users tab. Users have limited rights within the scheduler. They can view all appointments made as well as add, delete, and edit

appointments for the providers that are selected in the user configuration. Users cannot edit other users or providers, add services or change any of the software settings.

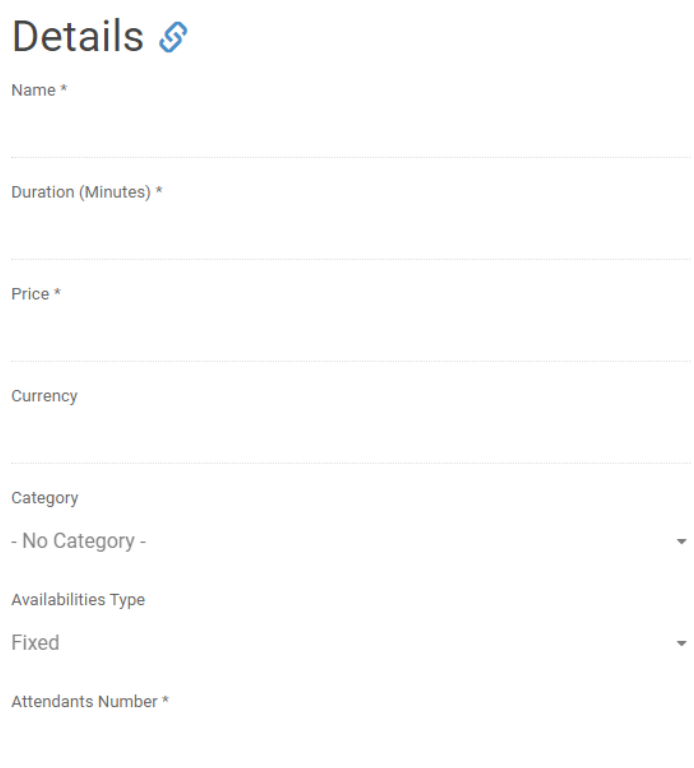
SERVICES TAB:

The Services tab contains the information about all the services offered at your Pharmacy.

SERVICES:

Allows you to add any service - such as Flu Shot appointments.

To edit or delete a service, select an existing service and press “edit/delete”
To add a new service, select “add” and type in the required details.



Attendants number is how many people can book an appointment in the same time slot. For example, if you are ok to book 2 patients for the same time slot, enter 2 in the attendants number.

Waitlist Configuration

For each service, you have the ability to create a waitlist based on your inventory for that specific service. To use the waitlist functionality, set your total inventory number in the “waitlist services doses” field. Then set the date of this total inventory in the “waitlist services doses date” field and the Scheduler will automatically calculate the total number of appointments that will be permitted based on these settings. Once the total number of appointments are reached, there will be no more appointments allowed until you indicate you have more inventory. Keep in mind that if you already have appointments previously booked in your schedule, these will count towards your inventory total.

When you receive more inventory: you can do one of two things:

1. Keep the date field the same and just add inventory (ie if you have Jan 10 2021 - 10 doses, and on Jan 22 you receive 3 more you keep the date as Jan 10 2021 and put 13 doses in the “waitlist services doses” field).

   OR

2. Use the appointment report and calculate the number of appointments booked between the date you last entered inventory and “today’s date”, then add the new inventory received to the left over inventory. (each appointment counts as one dose).

For example: if you entered 10 doses on Jan 10 2021 and on Jan 22 you receive 3 more doses, you calculate how many appointments have been booked between Jan 10 - Jan 22. If this number is 6, you would take 10 - 6=4 and add 3 additional doses to equal 7. You then put today’s date and set inventory to 7.

Once new doses are received by the pharmacy, customers on the waitlist are automatically sent an email notifying them about the new inventory and they are subsequently removed from the waitlist. All customers on the waitlist are entered in order of priority. The “Waitlist Dose Multiplier” field allows you to control the number of emails that will automatically be sent out when new appointments become available either by cancelations or by entering more inventory. For example, if you enter 20 new available doses and the “Waitlist Dose Multiplier” is set to 1, the scheduler will automatically send out 20 emails. If you want to send out 40 emails, the “Waitlist Dose Multiplier” should be set to 2. Likewise, if you are fully booked and have 1 cancellation and the “Waitlist Dose Multiplier” is set to 1, only one email will be sent out. The Waitlist Dose Multiplier can be a decimal number as well such as 0.5 or 1.5 or 1.1. This gives you control over how many people receive notifications.

The field below - “In Minutes” This is how long you want to give your patients to book an appointment before the appointment is available to others. WE DO NOT RECOMMEND MAKING THIS LOWER THAN 12 - 24 HOURS DUE TO POTENTIAL DELAYS IN EMAILS BEING SENT. For example if you set this to 720 mins (12 hours) the link sent to the customer will expire 12 hours after they receive it.

Keep in mind that the waitlist will calculate appointment availability by taking a few variables into account. The number of appointments already booked in your calendar from the Dose Date forward, any outstanding emails sent with appointment links that have not yet time expired and of course the total inventory doses you put in.

To understand when your Waitlist will turn on, we have implemented a formula. The formula is calculated per service:
# of doses available **-** # of booked appointments after dose date **-** unexpired waitlist emails (customers that have been offered the dose notified via email with an expiry).

If there are doses leftover after the above calculation, people on the waitlist receive a notification to book via email.
If there are still doses leftover after this, the waitlist functionality turns off and people are free to book the remaining doses (only up to the number of doses available at that point including unexpired offers sent to patients)
If at any point doses are unavailable the waitlist functionality will come on forcing people to go on the waitlist. .

If the doses are 0, the waitlist is on.

If you have available doses, the waitlist is off.

For example:
If you add 100 doses to your inventory, and they are 60 appointments booked AFTER your doses date, and 15 pending waitlist emails sent to patients for priority

100 - 60- 15 = 25

You have 25 doses available. If there is anyone on the waitlist, they will receive an email. If there are still extra doses after waitlist emails, the waitlist goes off.

If you want to customize the notification email sent to your customers, use the waitlist reminder subject (subject line) and body fields letting your customers know they can now book their appointments as new inventory has arrived.

WAITLIST FUNCTION

Waitlist Functionality *

ON

Waitlist Service Dose Inventory - What is your inventory starting on the waitlist service doses date below? *

100

Waitlist Service Doses Date - yyyy-mm-dd **date system starts counting appointments for dose inventory *

04/28/2021

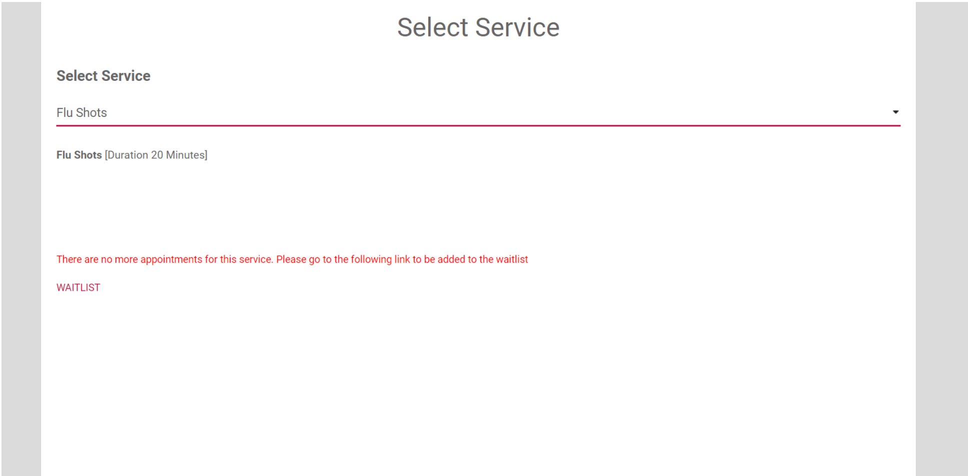
Waitlist Doses Multiplier The following number is a multiplier for the number of doses. (e.g. if you have 20 available doses and the number below is 1, it will send out 20 emails. If you want it to send out 40 emails, the number below would be set to 2. Please set the number to what you are comfortable with.)*

1

IN MINUTES: This is how long you want to give your patients to book an appointment before the appointment is available to others. WE DO NOT RECOMMEND MAKING THIS LOWER THAN 12 - 24 HOURS DUE TO POTENTIAL DELAYS IN EMAILS BEING SENT *

720

If the waitlist is configured and is turned on because there is no inventory, the customer will see the following:



The “WAITLIST” link will take customers to another page where they can enter their information to be placed on the waitlist.

You can edit/delete people from your waitlist in the WAITLIST REPORT

Service checkbox:
You can also add a mandatory consent checkbox to your appointment scheduler as a way of ensuring the customer qualifies for the appointment.. To turn on the checkbox, simply add any verbiage you desire in the “service checkbox” field under that service. You can also create different checkboxes for each service. The checkbox will show up on the front end “Fill in your Information” page - where the patient inputs their information.

Forms

You can add up to 3 forms for download per service. Use the “Service Links” fields to add forms to the scheduler. Each Service Link is numbered 1 to 3. Use the appropriate Service Link number for each form and follow the instructions below for adding forms to the scheduler.

Service link: If you would like to add a form specific to the service being offered- you can add a hyperlink to that form in “Service link”. The hyperlink is a URL of where the form resides for download.

Service link name: the name you enter here will appear as the form name to your customers. This is what your patients will see as the title for that form

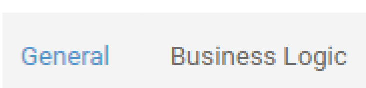
Service link description: information entered here will show up as a description of the form for your customers

***Please note you cannot add a form link in the Service Link description section - it will not show up as a hyperlink your customers can click on. Therefore, you must enter the URL link in the “Service Link” field.

All forms will show up after the appointment has been booked on the appointment confirmation page..

SETTINGS TAB:

There are 2 main settings - “general” and “business logic”

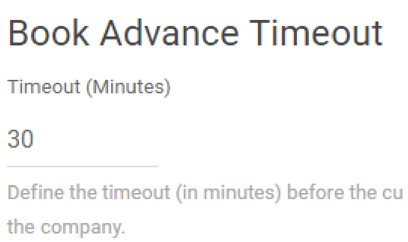


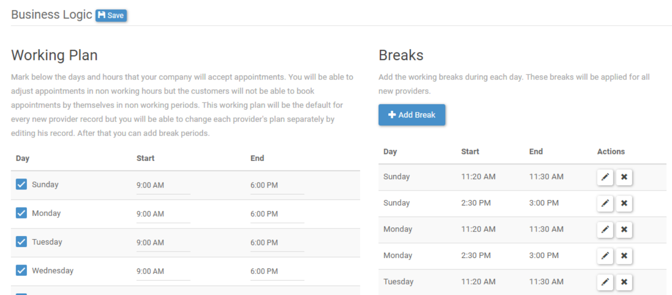
GENERAL:

Customer notifications and Google RECAPTCHA can be enabled/disabled here by clicking the corresponding blue buttons. Pharmacy information can also be changed in general settings.

BUSINESS LOGIC:

The work plan and breaks are applied to every NEW provider's working plan - it does not change an already established provider's work plan. The "book advance timeout" setting allows you to define how far in advance of the appointment, your customers can book or make alterations or edits.





ABOUT AMJAY APPOINTMENTS

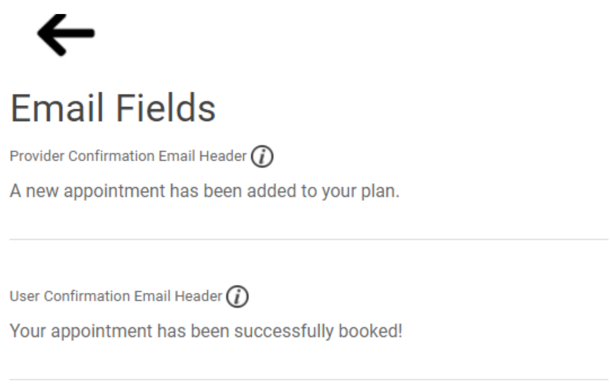
This is where you can access the Online Pharmacy Appointment Scheduler manuals and videos.

CHANGE SMS/EMAIL FIELDS

In this section you can customize the email/SMS fields and activate or deactivate the SMS function of the appointment scheduler. To see which part of the email you are customizing, simply press the little 'i' beside the field.

Please ensure you update these fields in the settings to contain your Pharmacy contact information.

If you would like to go back to the appointment engine, simply press the black back arrow at the top of the page.



Once you have edited any fields necessary, press submit.
If you see a blank page after submission just proceed back to the appointment engine - the settings have been saved.

FRONTEND CONFIGURATION

In this tab, you can edit the frontend information fields that your customers fill out when booking an appointment. You can turn fields on/off and enable fields to be mandatory or not.

REMINDER EMAIL TAB:

CONFIGURE EMAIL REMINDERS

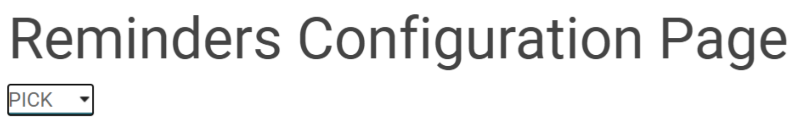
There are 3 different types of email communications you can set up for your customers:

1. Email reminder the day after the appointment was booked
2. Email reminder the day before the appointment
3. Email the day after the appointment

You can configure the email communications under “SETTINGS” in the “Configure Reminders” sub tab. This will take you to the email reminder setup page where you will first need to pick the appropriate service you want to send the communication about.

Once you have selected the service, you can then set the email headers (title), descriptions (body) and other information to customize the message. Simply click on the “i” button beside the input boxes to see what part of the email you are configuring.

You can also toggle the email communications on/off by service. Once everything is configured to your liking, press the “submit” button and the message “successful return to mainpage” will appear. You can then return back to your scheduler.



REPORTS DIRECTORY TAB:

The Reports Tab provides the following reports:

1. Current Waitlist
2. Previous Waitlist
3. Reminder Report
4. Appointment Report

Appointment report - view all appointments

To print/edit/delete your appointments in a table format by service, go to the “Reports Tab” in the backend.

Simply select the date range of the calendar in the dropdown. To put a custom range press “CUSTOM RANGE”.

Next select a service (same services in backend) and press LOAD.

Once the table is loaded, you will be able to view it online. You can also print it off by exporting to either PDF or EXCEL. Doing a web print will not show all information.

Reminders report - View all reminders sent

To see all the appointment reminders that have been sent out, simply navigate to the “Reminder Report” tab. Search by service and date of when the appointment was scheduled (start date of appointment)...NOT when the email reminder was sent.

Select the date range on the calendar in the dropdown. To put a custom range press “CUSTOM RANGE”.

press “LOAD”. Once the table is loaded, you will be able to view it online. You can also print it off by exporting to PDF or EXCEL. Doing a web print will not show all information.

Waitlist report - View/Edit current waitlist

To see all the customers on the waitlist, navigate to the “Report Directory” tab and select the “Waitlist” report. From here you can see all the customers who are currently on the waitlist as well as their contact information. You have the ability to Edit or Delete the information on the waitlist as well as the ability to download to PDF or Excel.

Previous Waitlist report - View past waitlist

To see all the customers on a previous waitlist, navigate to the “Report Directory” tab and select the “Previous Waitlist” report. From here you can see all the customers who had registered on a previous waitlist as well as their contact information. You also have the ability to download to PDF or Excel.

TROUBLESHOOTING:

ERROR MESSAGE:

If you experience any type of error, a simple refresh of the page and clearing of cache is typically all it takes to resolve the issue. If the problem persists, please contact us at:

info@amjaysoftware.com
1-800-385-6853

FORGOTTEN PASSWORD

AS AN ADMIN

If you forget your password as an admin, you must go to the login page and press “Forgot password”. You will then type in your email and your username entered into the system under that admin and you will receive an email with your credentials.

AS A PROVIDER/USER

To reset a provider's password simply go through the admin in the backend and change it.

EMAIL FORWARDING:

All replies to the customer confirmations emails will be forwarded to the pharmacy email.