

Appointment Calendar



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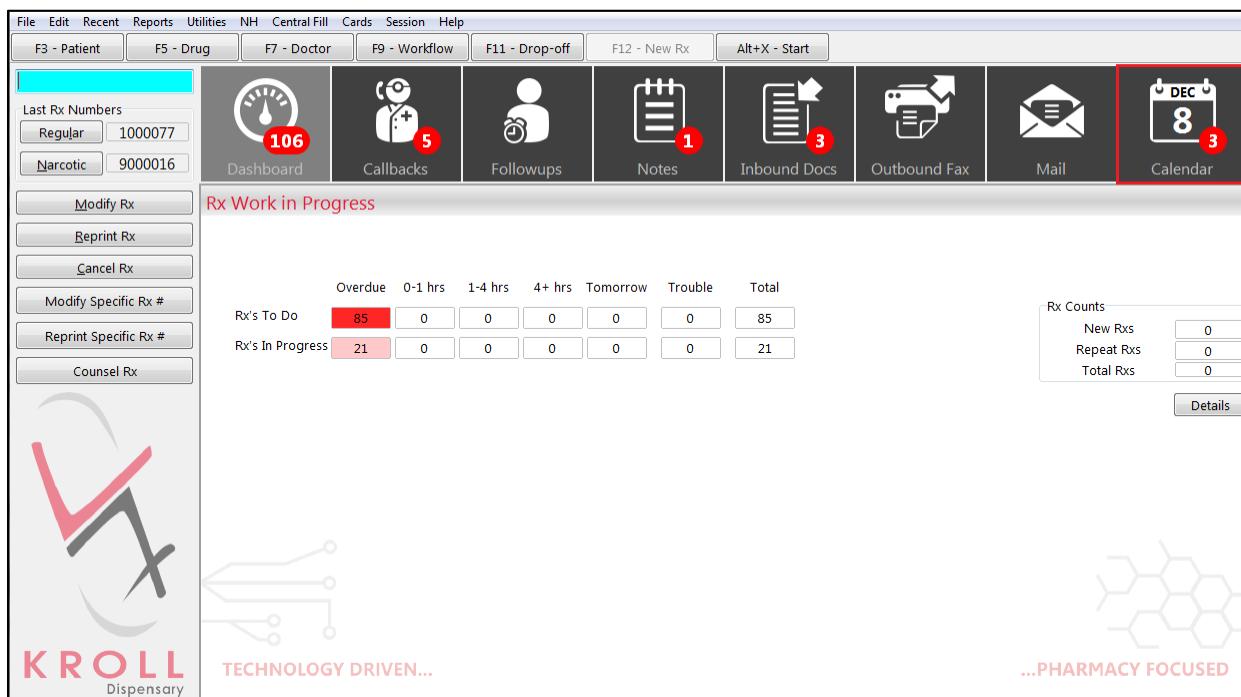
Appointment Calendar

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.

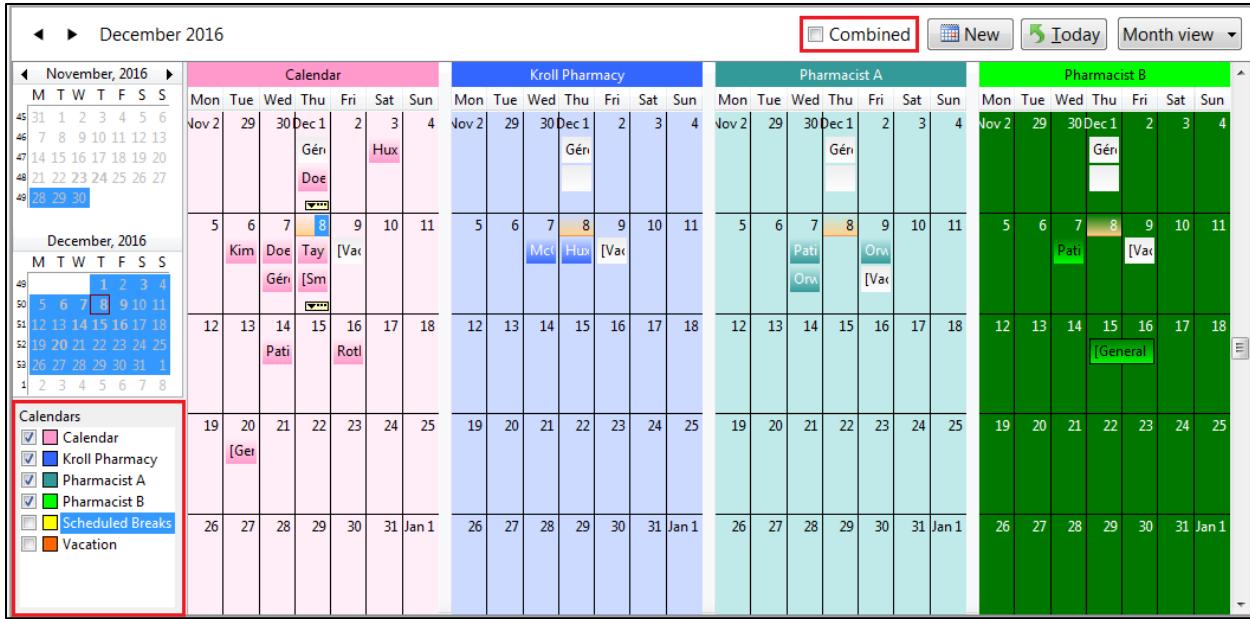
Calendar Screen Explained

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

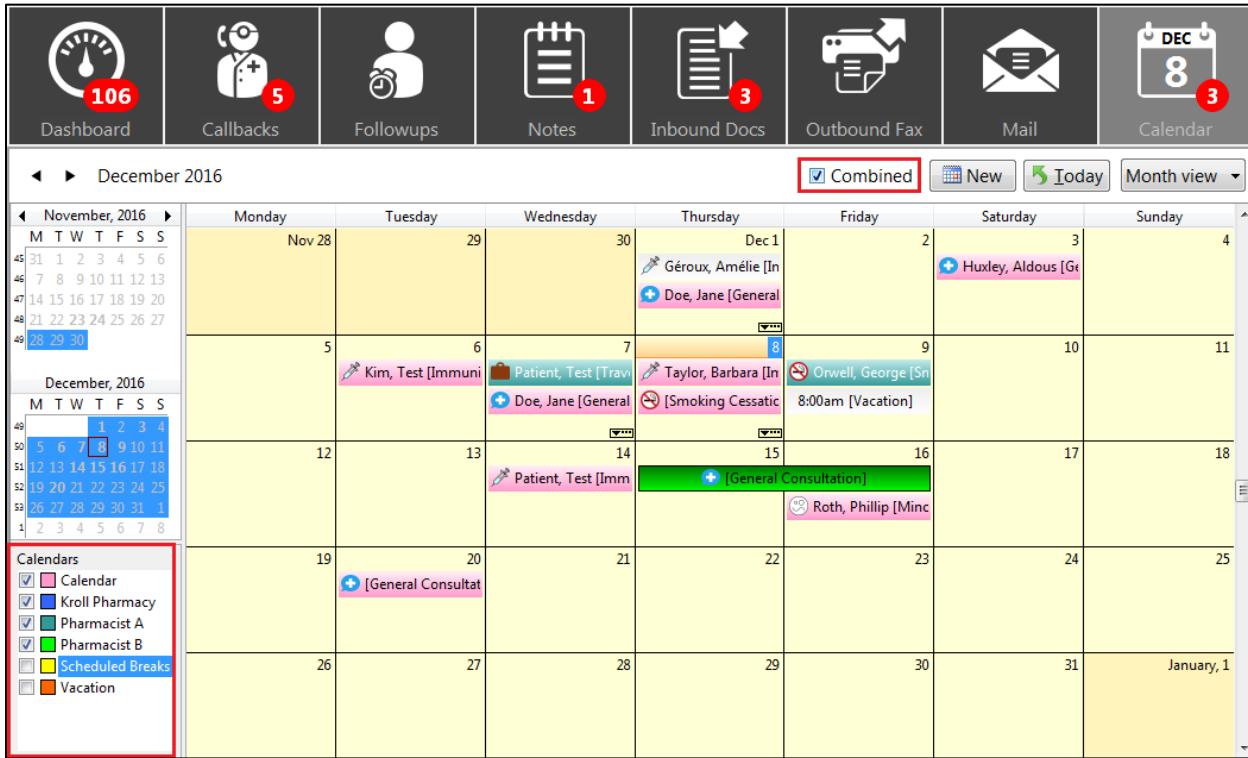
Each configured calendar will appear in the bottom left corner of the **Calendar** screen. Place a checkmark next to the calendars whose appointments you want to view. If **Combined** is not enabled, a column for each selected calendar will display.



The screenshot displays the KROLL Appointment Calendar for December 2016. The interface is organized into several sections:

- Top Bar:** Includes navigation arrows for month selection, a "Combined" checkbox (which is checked), a "New" button, a "Today" button, and a "Month view" dropdown.
- Left Sidebar:** Shows a small November 2016 calendar and a larger December 2016 calendar. The December calendar highlights specific dates with color-coded boxes (pink for general, blue for Kroll Pharmacy, teal for Pharmacist A, green for Pharmacist B, yellow for scheduled breaks, and orange for vacation).
- Bottom Left Legend:** A box titled "Calendars" contains checkboxes for selecting which calendars to display. The checked items are:
 - Calendar (pink)
 - Kroll Pharmacy (blue)
 - Pharmacist A (teal)
 - Pharmacist B (green)
 - Scheduled Breaks (yellow)
 - Vacation (orange)
- Central Grid:** The main area shows four separate calendar grids for different users:
 - Kroll Pharmacy:** Shows a mix of pink, blue, and teal boxes.
 - Pharmacist A:** Shows a mix of teal, blue, and pink boxes.
 - Pharmacist B:** Shows a mix of green, blue, and pink boxes.
 - General:** Shows a mix of pink, blue, teal, and green boxes.
- Bottom Right:** A vertical scroll bar is visible on the right side of the main grid area.

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



The screenshot shows the KROLL Appointment Calendar interface. At the top, there is a navigation bar with icons for Dashboard, Callbacks, Followups, Notes, Inbound Docs, Outbound Fax, Mail, and Calendar. The Calendar icon has a red circle with the number '3' on it. Below the navigation bar is a toolbar with buttons for Back, Forward, Month view, New, Today, and Combined (which is checked). The main area is a calendar grid for December 2016. The grid shows various appointments for different users and types. A legend on the left side, enclosed in a red box, lists the following calendar categories:

- Calendar (pink square)
- Kroll Pharmacy (blue square)
- Pharmacist A (teal square)
- Pharmacist B (green square)
- Scheduled Breaks (yellow square)
- Vacation (orange square)

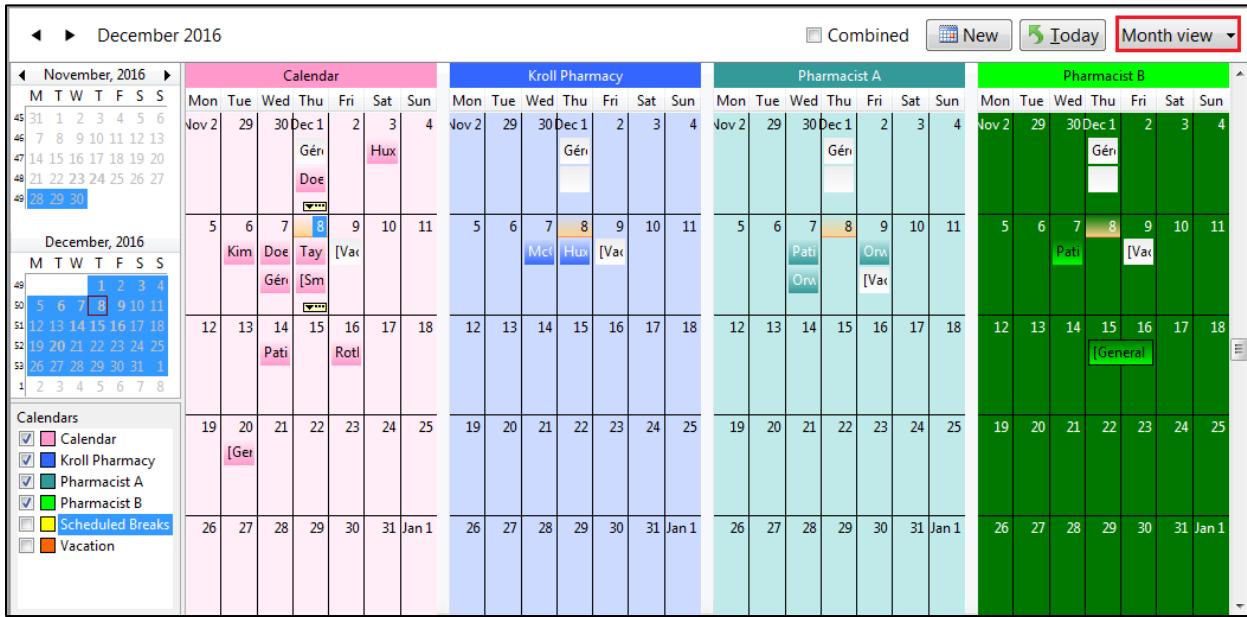
The calendar grid includes the following details:

- November 28:** No visible appointments.
- December 1:** Géroux, Amélie [In] (pink), Doe, Jane [General] (blue).
- December 2:** Huxley, Aldous [Ge] (pink).
- December 5:** Kim, Test [Immun] (pink), Patient, Test [Trav] (blue), Doe, Jane [General] (blue).
- December 6:** Taylor, Barbara [In] (pink), Orwell, George [Sm] (blue).
- December 8:** Smoking Cessatic (pink).
- December 12:** Patient, Test [Imm] (pink).
- December 13:** General Consultation (green).
- December 14:** Roth, Phillip [Minc] (pink).
- December 19:** [General Consultat] (pink).
- December 20:** [General Consultat] (pink).
- December 21:** No visible appointments.
- December 22:** No visible appointments.
- December 23:** No visible appointments.
- December 26:** No visible appointments.
- December 27:** No visible appointments.
- December 28:** No visible appointments.
- December 29:** No visible appointments.
- December 30:** No visible appointments.
- December 31:** January, 1 (light orange).

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:



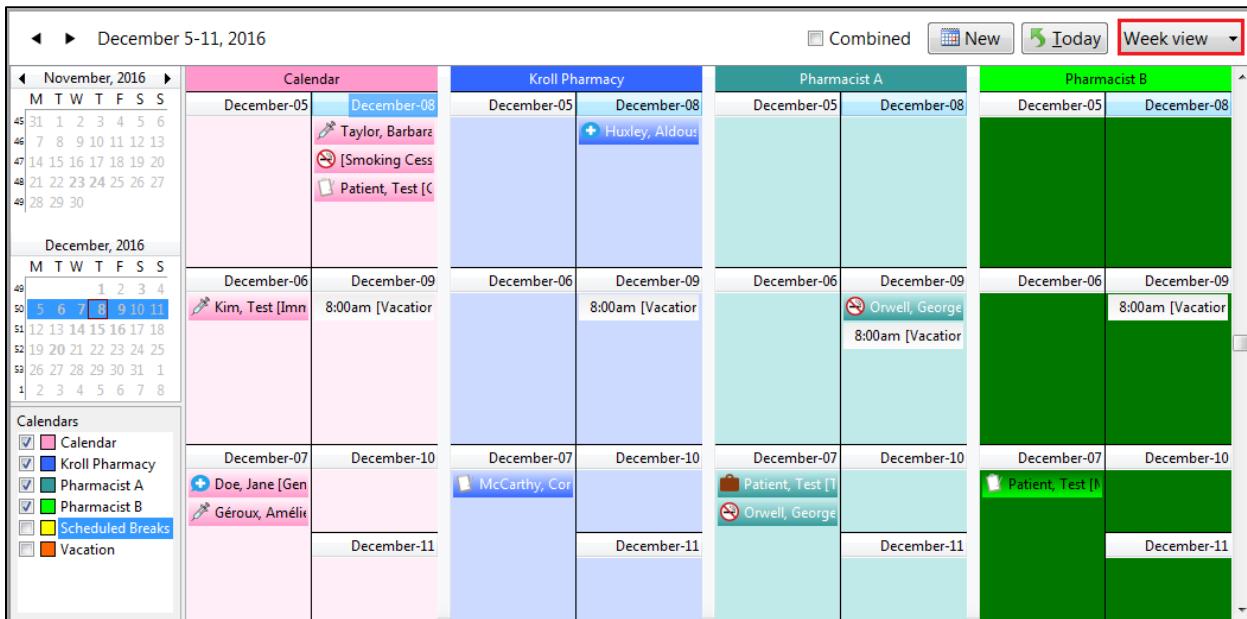
◀ ▶ December 2016

Mon	Tue	Wed	Thu	Fri	Sat	Sun
Nov 29	30	Dec 1	2	3	4	
Kim	Doe	Tay	[Vac]			
Pati	Roth					
19	20	[Gen]				
26	27	28	29	30	31	Jan 1

Calendars

- Calendar
- Kroll Pharmacy
- Pharmacist A
- Pharmacist B
- Scheduled Breaks
- Vacation

Week view:



◀ ▶ December 5-11, 2016

Mon	Tue	Wed	Thu	Fri	Sat	Sun
31	1	2	3	4	5	6
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	Jan 1

Calendars

- Calendar
- Kroll Pharmacy
- Pharmacist A
- Pharmacist B
- Scheduled Breaks
- Vacation

Day view:

The screenshot shows a software interface for managing patient appointments and staff schedules. At the top, a navigation bar includes icons for back, forward, and search, followed by the date "December 8, 2016". To the right are buttons for "Combined" view, "New", "Today", and "Day view".

The main area displays a "Combined" calendar for December 8, 2016, across four columns:

- Calendar:** Shows a pink background for the entire day.
- Kroll Pharmacy:** Shows a blue background for the entire day.
- Pharmacist A:** Shows a teal background for the entire day.
- Pharmacist B:** Shows a green background for the entire day.

Below the columns, specific events are listed:

- 8:00 AM:** No scheduled events.
- 9:00 AM:** No scheduled events.
- 10:00 AM:** A pink box contains the event "[Smoking Cessation Consultation]".
- 11:00 AM:** A blue box contains the event "[General Consultation]".
- 12:00 PM:** A pink box contains the event "[Patient, Test [Care Plan]]".
- 1:00 PM:** No scheduled events.
- 2:00 PM:** No scheduled events.
- 3:00 PM:** No scheduled events.
- 4:00 PM:** No scheduled events.

Calendars: On the left, a sidebar lists available calendars with checkboxes:

- Calendar (pink)
- Kroll Pharmacy (blue)
- Pharmacist A (teal)
- Pharmacist B (green)
- Scheduled Breaks (yellow)
- Vacation (orange)

 The "Kroll Pharmacy" checkbox is selected.

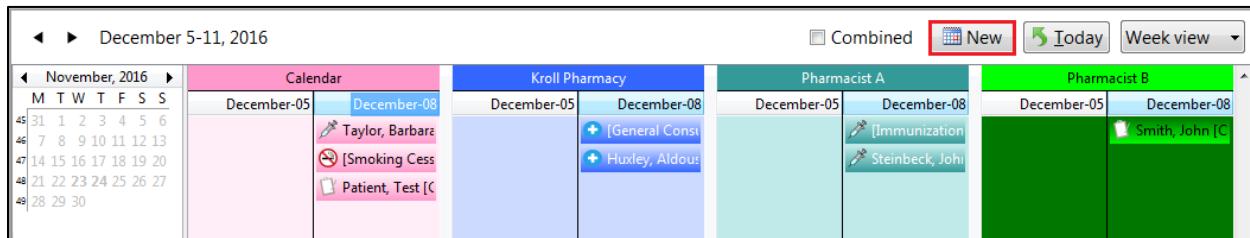
If you click the **Today** button, the Calendar will highlight today's date in each displayed calendar:

Appointments

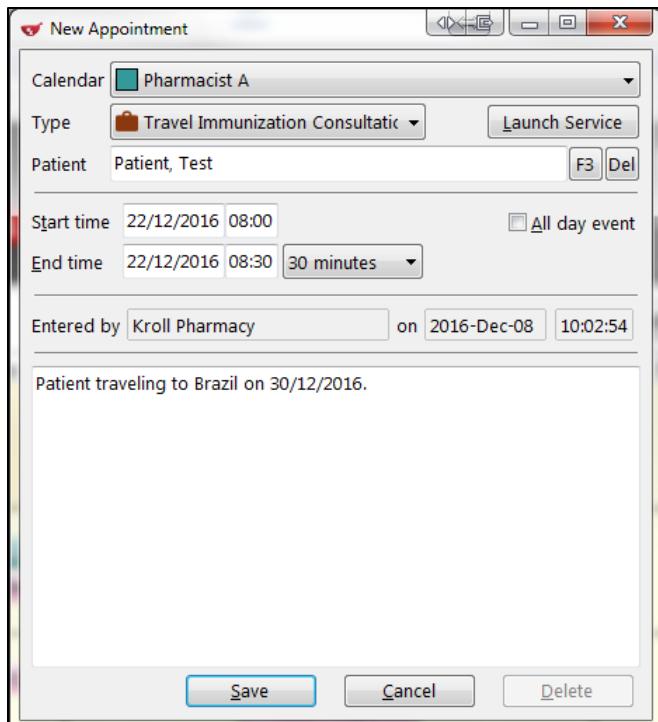
This section explains how to create, modify, and delete appointments, and how to launch scheduled services directly from the Calendar.

Inserting a New Appointment

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



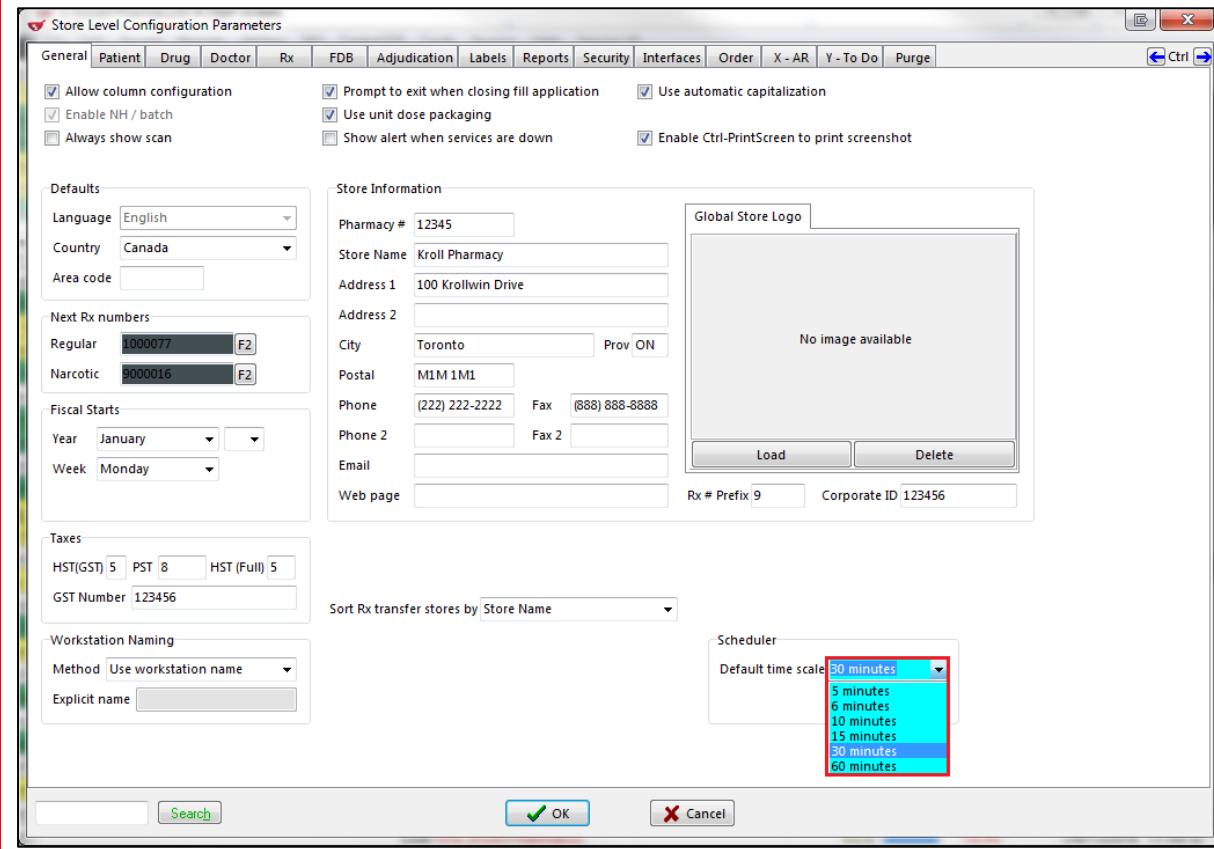
2. The **New Appointment** form will appear. Complete the form and click **Save**.



- **Calendar:** Select the calendar you want to assign the appointment to.
- **Type:** Select an appointment type.

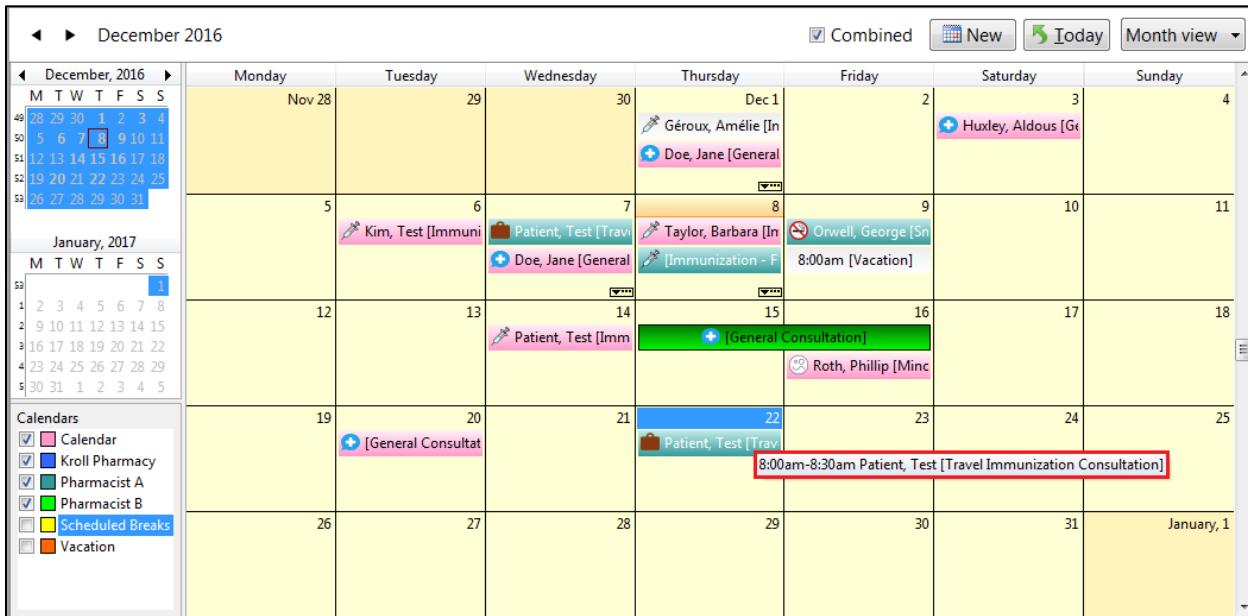
- **Patient:** Click **F3** to optionally search for and select a patient. Once a patient is selected, the **Del** button can be used to remove the patient from the appointment.
- **Start time/End time:** Enter the start time. Select the length of the appointment from the list. The end time will update 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.

- The appointment will be added to the calendar. Place the cursor over the appointment to see appointment details.



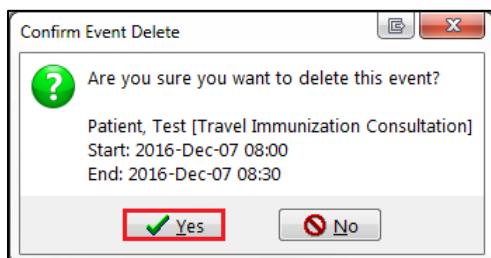
The screenshot shows a monthly calendar interface for December 2016 and January 2017. The calendar grid displays days from Monday to Sunday. Several appointments are listed with icons representing different types of events. A sidebar on the left contains a calendar legend with color-coded boxes for different categories like 'Calendar', 'Kroll Pharmacy', etc. The main calendar area shows specific events such as 'Géroux, Amélie [In]', 'Doe, Jane [General]', 'Kim, Test [Immuni]', 'Patient, Test [Trav]', 'Taylor, Barbara [In]', 'Orwell, George [Sn]', 'Immunization - F', 'Patient, Test [Imm]', '[General Consultation]', 'Roth, Phillip [Minc]', '[General Consultat]', 'Patient, Test [Trav]', and '8:00am-8:30am Patient, Test [Travel Immunization Consultation]'. The '8:00am-8:30am Patient, Test [Travel Immunization Consultation]' event is highlighted with a red border.

Modifying an Appointment

- Double-click the appointment you want to modify.
- The **Edit Appointment** form will appear. Make the necessary changes and click **Save**.

Deleting an Appointment

- Double-click the appointment you want to delete.
- The **Edit Appointment** form will appear. Click **Delete**.
- A prompt will appear asking if you are sure you want to delete the event. Answer **Yes**.



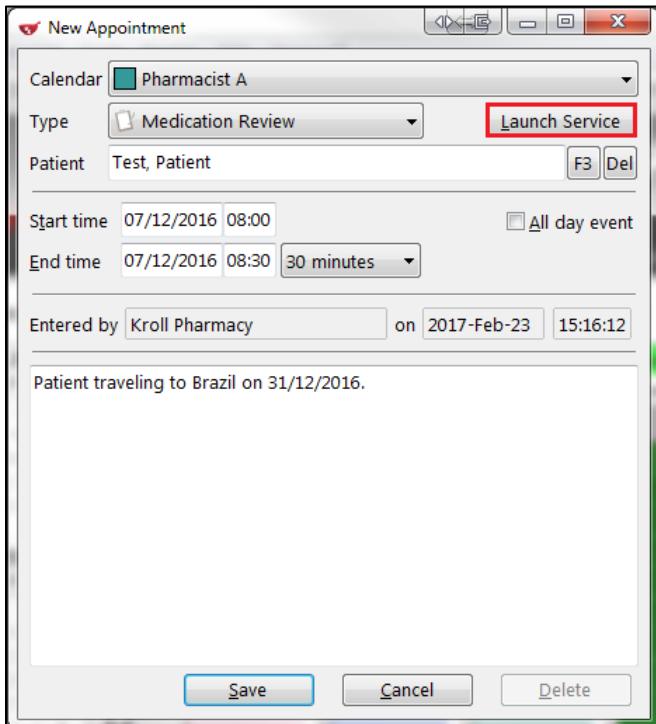
The appointment will be removed from the Calendar.

Launching a Service

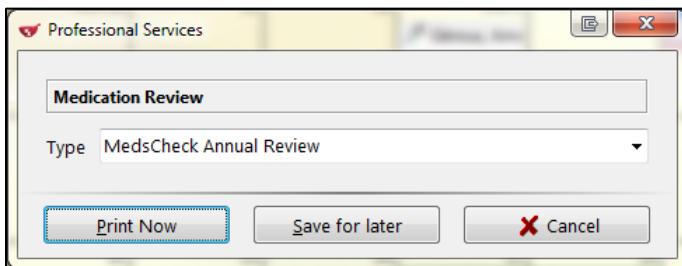
When an appointment for a service is due, the service can be launched directly from the Calendar screen.

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**.

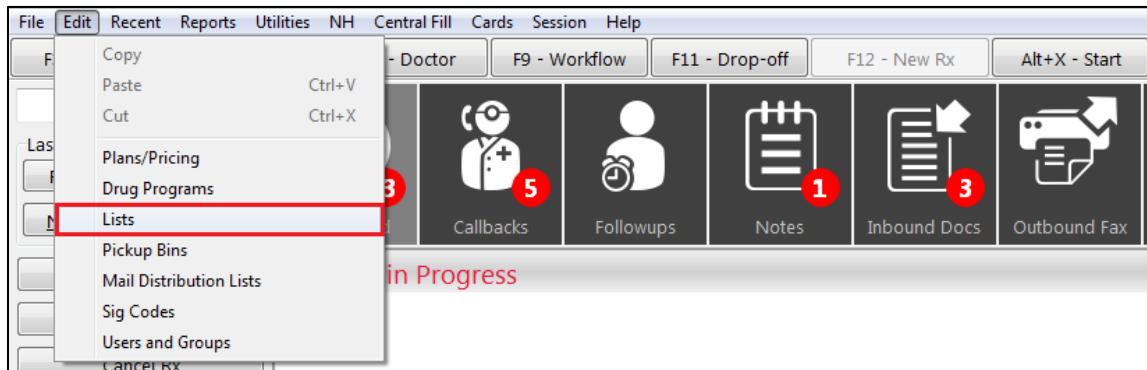


3. The **Professional Services** screen will appear with the service type selected. Select a sub **Type**, if one is available, and begin performing the service.



Configuration

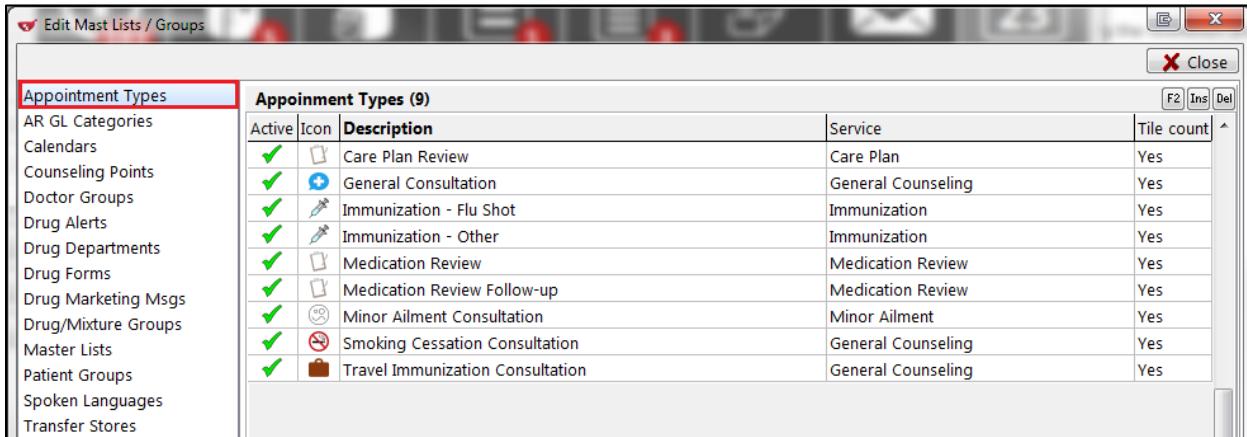
Appointment Calendar configuration settings can be accessed by selecting **Edit > Lists** from the **Alt+X - Start** screen.



This will call up the **Edit Mast Lists / Groups** screen where Appointment Types and Calendars can be added, modified, and deleted.

Appointment Types

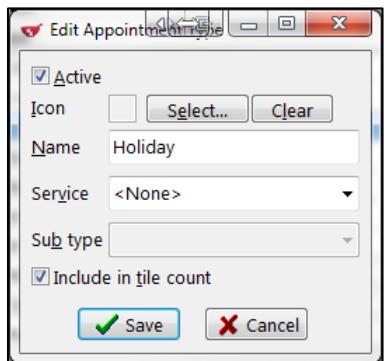
Select **Appointment Types** from the **Edit Mast Lists / Groups** screen. A list of configured appointment types will appear.



Appointment Types		Appointment Types (9)			
Active	Icon	Description	Service	Tile count	
✓	📄	Care Plan Review	Care Plan	Yes	
✓	🕒	General Consultation	General Counseling	Yes	
✓	💉	Immunization - Flu Shot	Immunization	Yes	
✓	💉	Immunization - Other	Immunization	Yes	
✓	📅	Medication Review	Medication Review	Yes	
✓	📝	Medication Review Follow-up	Medication Review	Yes	
✓	👁️	Minor Ailment Consultation	Minor Ailment	Yes	
✓	🚫	Smoking Cessation Consultation	General Counseling	Yes	
✓	💼	Travel Immunization Consultation	General Counseling	Yes	

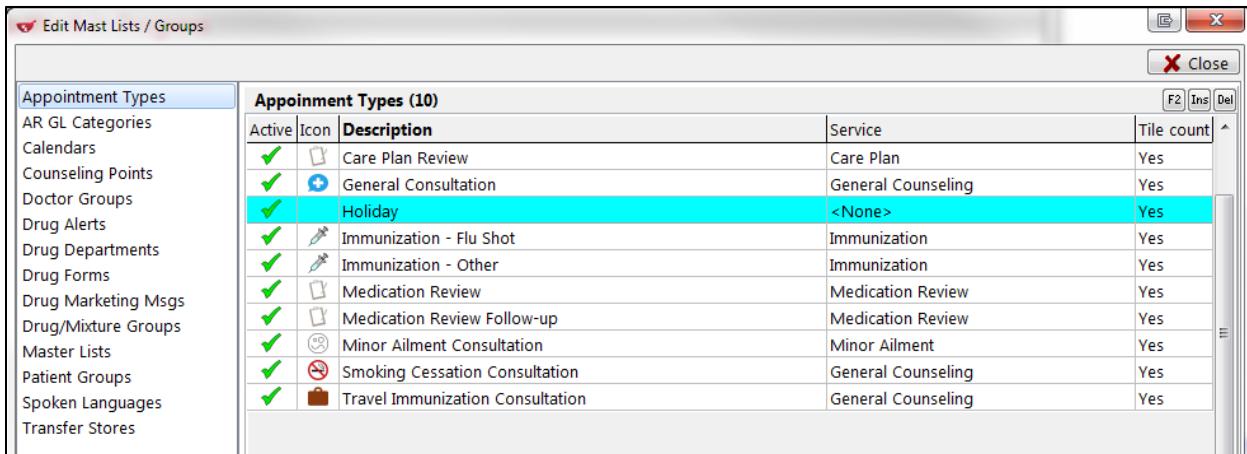
Inserting an Appointment Type

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.



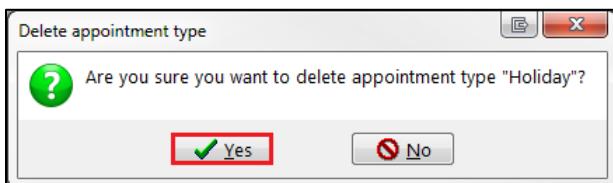
Appointment Types (10)				
Active	Icon	Description	Service	Tile count
✓	📄	Care Plan Review	Care Plan	Yes
✓	💬	General Consultation	General Counseling	Yes
✓	📅	Holiday	<None>	Yes
✓	💉	Immunization - Flu Shot	Immunization	Yes
✓	💉	Immunization - Other	Immunization	Yes
✓	📄	Medication Review	Medication Review	Yes
✓	📄	Medication Review Follow-up	Medication Review	Yes
✓	🤕	Minor Ailment Consultation	Minor Ailment	Yes
✓	🚫	Smoking Cessation Consultation	General Counseling	Yes
✓	💼	Travel Immunization Consultation	General Counseling	Yes

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**.

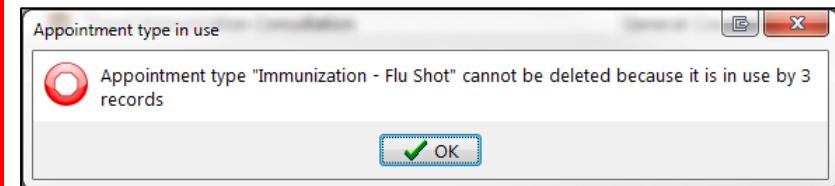
Deleting an Appointment Type

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**.



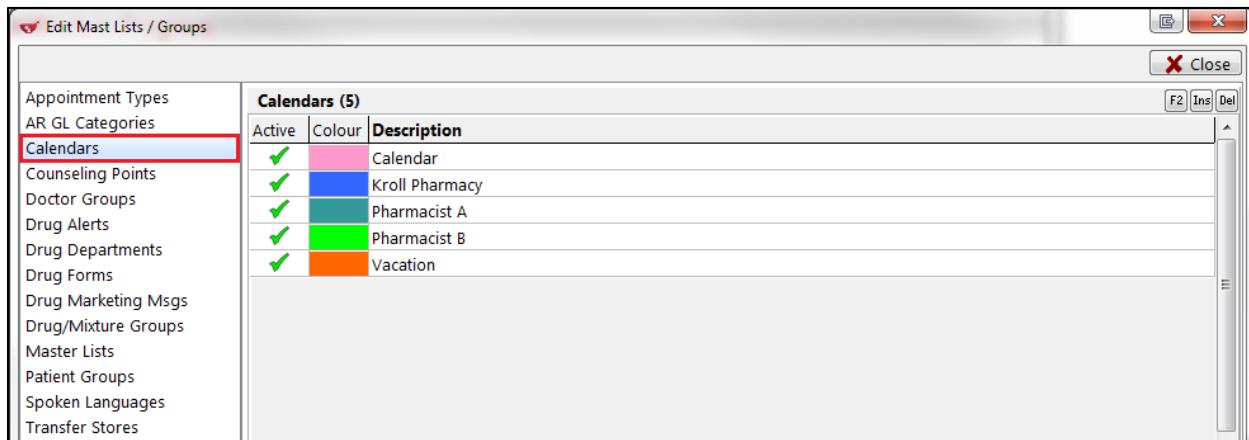
The appointment type will be removed from the **Appointment Types** list.

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



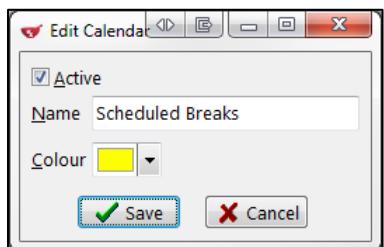
Calendars

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



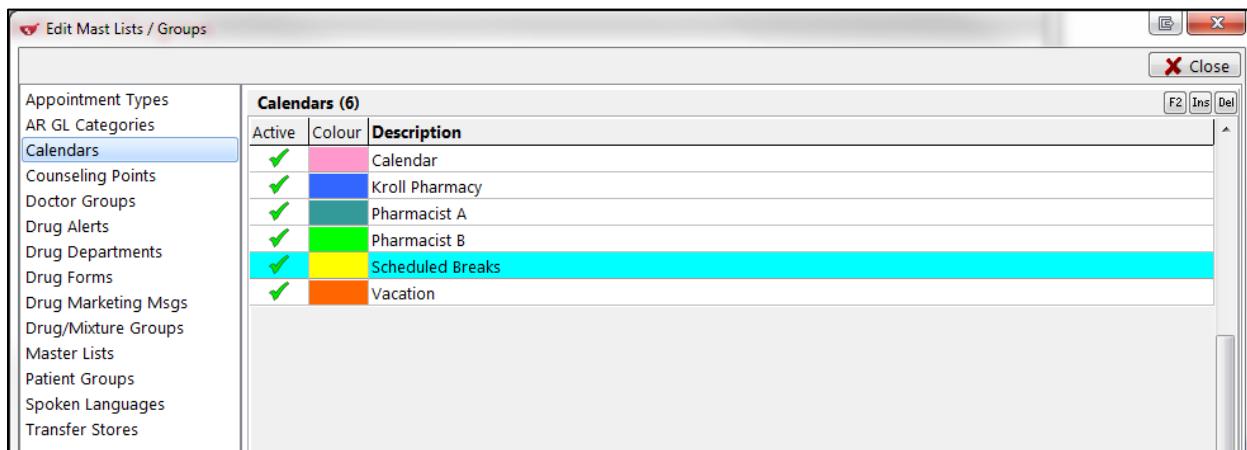
Inserting a Calendar

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.

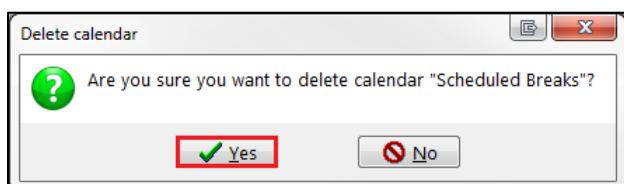


Modifying a Calendar

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:

