

CANImmunize Clinic Flow Training for Clinic Owners

FALL 2023

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- **Clinics** is the location of the Pharmacy clinic where you create your Calendars and Rules.
- **Calendars** are designed to contain clinic schedules for a short period of time.
- **Availability** rules create appointment slots, which are shown on booking page(s) and can be booked into.

Duplicating a Calendar

CLINIC

← Fairview Test Clinic

Status: Active Category: Pharmacy (PANS) Els Pharmacy GIS Location Copy ID

Appointments Availability Rules **Calendars** Cohorts Clinic Mode Users Patients Stats

Calendar Search + New Calendar

Name	Last Availability	Status	Type	Actions
Fairview Test Clinic - Pfizer Bivalent - May 1-15	May 15, 2023	Active	Public	Edit Duplicate Disable
Fairview Test Clinic - Flu - Internal	April 15, 2023	Active	Internal	Edit Duplicate Disable
Fairview Test Clinic - (Pfizer Bivalent) - Mar 20 22 24	May 31, 2023	Active	Public	Edit Duplicate Disable
Fairview Test Clinic - Flu (Mar 21 23)	March 24, 2023	Active	Public	Edit Duplicate Disable
Fairview Test Clinic (Pfizer Bivalent) - Mar 1 3 8 10	March 10, 2023	Active	Public	Edit Duplicate Disable
Fairview Test Clinic - Pfizer Bivalent - Internal	December 8, 2023	Active	Internal	Edit Duplicate Disable
Fairview Test Clinic - Flu	March 15, 2023	Active	Public	Edit Duplicate Disable
Fairview Test Clinic - Moderna Bivalent	March 15, 2023	Active	Public	Edit Duplicate Disable

When duplicating an existing calendar the new calendar will automatically have a status of “Staging” and will contain all availability rules that were on the original calendar.

Ensure you either EDIT or DELETE existing copied rules.

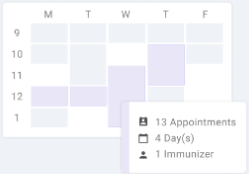
When duplicating a calendar, you will land on the Calendar → Details tab. From here, you can update the calendar details or navigate to the Availability subtab within the calendar to manage the availability rules on the calendar.

Creating a New Calendar

5

Appointments Availability Services **Calendars** Cohorts Clinic Mode Users Patients Stats

Calendar Search



What's an Availability Rule?

An availability rule creates appointment slots that can be booked into, when linked to booking pages. Availability rules can have a single service or multiple services, however, only allow one product per service. If the rule is housed under a clinic that has been linked to a booking page and the availability rule, clinic, and booking page are all set to active, the resulting availability can be booked into.

Availability Rule Block Rule Daily Inventory Rule Calendar Inventory Rule

Rule Name (Optional)

* Calendar
Acadia Yarmouth FN (Flu) - Oct 2022 - Mar 2023

* Status
Staging

* Services

Service	Required	Remove
Select Service	<input type="checkbox"/>	<input type="button" value="Remove"/>

Date: 2023-08-31 Recurring:

Start Time: 09:00 End Time: 17:00

Immunizer Count: Appointment Duration:

Resulting Availability:

Calendar:

Name: Please refer to colour & naming conventions.

Status: This dictates whether appointments associated with this calendar will display on booking pages that the clinic is linked to. Keep Staged until ready for Live.

Type: Public.

Once all four fields have been filled out, select “Save” to save your new calendar and proceed to rule creation.

Under Availability Rules:

Status: Active (as long as the calendar is staged the appointments will remain off the booking page)

Service: Select a type

Product: Select a product

Required toggle: On

Date: Either select a day or a range if you have recurring appointments

Time: Select start and end time

Immunizer: How many immunizers

Appointment Duration: How long is each appt

Click **Next**

REVIEW YOUR SUMMARY

Recurring Rules

* Services Add Service

Service ?	Product ?	Required ?	Remove
COVID-19 Vaccination	Pfizer Bivalent BA.4/5	<input checked="" type="checkbox"/>	✖

Start Date: 2023-08-31 📅 End Date: 2023-08-31 📅 Recurring ?

Start Time: 09:00 🕒 End Time: 17:00 🕒

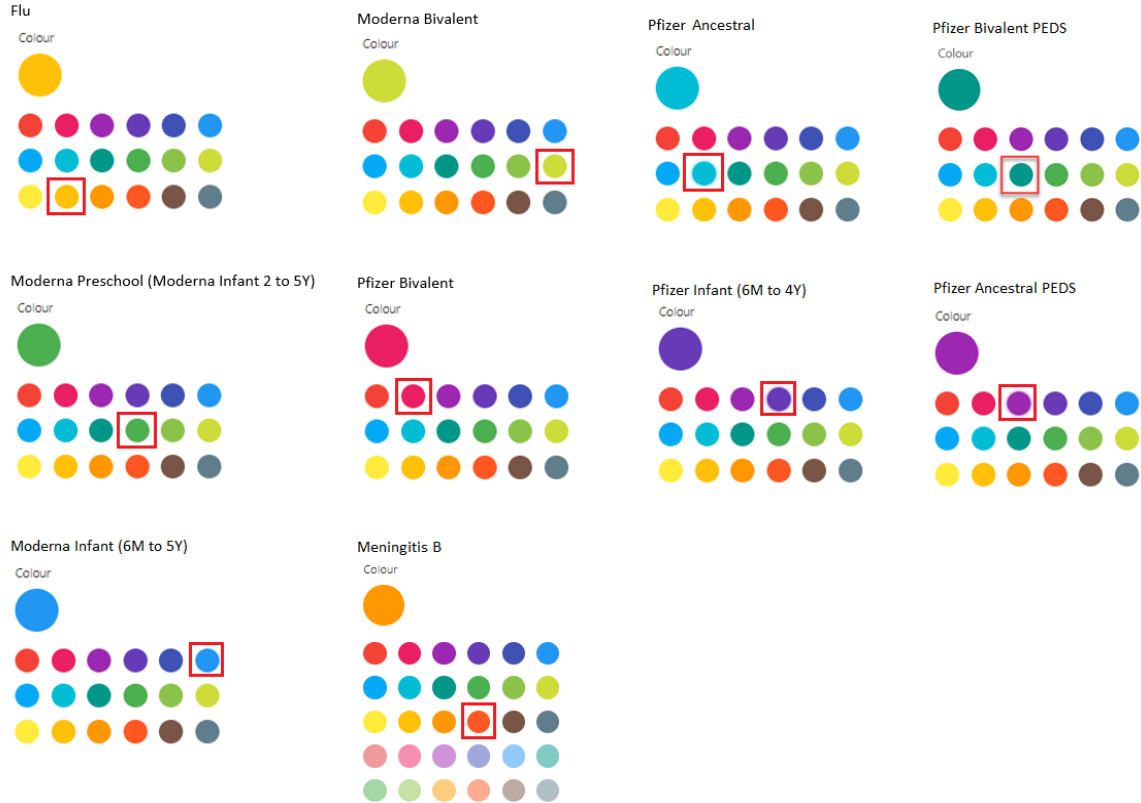
Days ?
Tuesday ✕ Thursday ✕

Immunizer Count ? : 1 Appointment Duration ? : 5

Resulting Availability:
📅 96 Appointments 📅 1 days with availability 👤 1 Immunizer

Recurring Rules: If you are running a clinic over several weeks and have the same time and days, you can enter the Start and End Date and can select the days of the week in which the clinic will occur. Please ensure you select the correct days and that they are consistent over the weeks selected.

Calendar Naming Convention



For a Clinic at a Pharmacy

- Pharmacy Name (Vaccine) - 2023 Mar...
- i.e. Shoppers Drug Mart 129 (Pfizer Bivalent) - 2023 Mar 1 4 15

Lessons Learned

- For a multi day clinic – create ONE calendar with multiple RULES
- Duplicating calendars – you must delete or edit the copied rules
- Remove the ‘Copy’ from the name duplicated calendars
- Ensure both the calendar and rule status is changed from ‘Staging’ to ‘Active’ for the clinic to be live
- The required toggle must be on for single vaccine calendars or at least one vaccine in combo calendars
- Recurring Rules can save you a lot of time!!
- Once you have made a calendar live, double check it is available for booking on the public booking page
- The Stats tab is another way to check your appointments
- Once a calendar is live, do not add or delete anything from the calendar

Questions and Contact

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