

## Appointment Color Codes

<b>red</b>	<b>Unconfirmed</b>	<b>forest green</b>	<b>Online confirmed by office</b>
<b>burgundy</b>	<b>Confirmed</b>	<b>pink</b>	<b>Next Eye Exam unconfirmed</b>
<b>light green</b>	<b>Online unconfirmed</b>	<b>purple</b>	<b>Checked-In</b>
<b>dark green</b>	<b>Online confirmed</b>	<b>blue</b>	<b>Checked-Out</b>
		<b>yellow</b>	<b>Event</b>

## Moving the NEE to a Scheduled Appointment

- Click “search” button at top. Enter last name or phone number and first name or DOB to narrow search. Click “Search.”
- Click “update” next to patient’s Next Eye Exam.
- Click “cut” button at bottom of screen and “OK” to add patient’s information to clipboard at top right of screen.
- Navigate calendar to appropriate day/time on Scheduled Appointments.
- Click “(p)” to paste appointment onto page.

## Finding or Updating Patient Information

- Click “search” button at top of screen.
- Enter last name or phone number and first name or DOB to locate patient and click search button.
- Click on patient’s name.
- Update information.
- Click “save” button at bottom of screen.

## Checking a Patient In

- Click on patient’s appointment.
- Click “check in” button at bottom of screen.

## Accessing Reports

- Click “reports” button at top of screen.
- TAB defaults to the Schedule Report. Other reports can be accessed by clicking on the drop-down arrow to the right of the “print” button.
- Set appropriate parameters, such as beginning and ending time, Optometrist, etc.
- Click “refresh” button at top.
- Click “print” to print.









## Checking a Patient Out

- Click on patient’s purple, checked-in appointment.
- Click “check out” button at bottom of screen.
- Click “Yes” to create the next Eye Exam for the patient.
- Complete required fields, including exam type. Click “Next.”
- Click “OK” to add NEE info to clipboard at top right of screen.
- The calendar navigates to Unconfirmed NEE page 53, weeks ahead.
- Click “(p)” to paste the patient’s information into her desired date and time.
- The Next Eye Exam appointment should turn pink.
- Click “Home” to return to schedule and current day’s date.
- Checked out appointment should now be blue.

## Rescheduling a Patient

- Click on patient’s name.
- Click “cut” button at bottom of screen and “OK” to add patient’s information to clipboard at top right of screen.
- Navigate calendar to appropriate day/time on Scheduled Appointments.
- Click “(p)” to paste appointment onto page.

## TAB Symbols

	Insurance billing approved
	Insurance billing pending
	Insurance billing declined
	Cash or other payment expected
	Payment option unknown
	Phone call placed
<b>EM</b>	Appointment booked by EyeMed field rep
<b>CC</b>	Appointment booked by call center
	Recurring event
	Help or additional information