

User Guides - **Diary**

Learn how your Blink diary can be used for internal and external appointment bookings. Also how the diary links with other sections of the Blink system.

The Blink diary is primarily used to book patient appointments into your Blink system. Diary entries can be booked in two ways:

- straight into the diary from Blink
- from an external booking system

There are many features of the diary can be configured to suit your practice.

The Blink diary can be set up to include up to 6 separate diaries, e.g. one for each optom plus one for the dispensing optician, or maybe one for each testing room etc. Each diary can be configured with start and end times to suit individual clinic times on different days of the week.

Appointment types can be configured by the practice, including default appointment length and colour coding to make information easy to identify.

The system also allows, recurring appointments and non-clinical appointments, e.g. staff training.

We can also set up fully automated email or sms appointment reminders to your patients. If you would like this to be set up just let us know how far in advance of the appointment you would like the reminder to be sent, e.g. one day or two days etc.

Setting up your Blink Diary

Before adding your first patient appointment to the Blink diary you will need to set the diary up with optoms and dispensing opticians, set up testing days and times.

MRS DIANE SMITH (ID: 1216) Clear Software

PATIENT DATA DISPENSING RECALLS DIARY MY ACCOUNT SYSTEM ADMIN LOGOUT

Users

- ADD Venue
- Edit Venue
- ADD Doctor
- Edit Doctor
- ADD Staff
- Edit Staff
- ADD Practice
- Edit Practice
- Diary
- Stock
- Medical Condition
- Template Management
- Data Management
- Audit Log
- Reporting

Update Staff Member Update

User Information:

Staff Name * Terry Woodhouse

Practice * High Street Opticians

Diary Sequence First

Mon Start Time 8.30

Mon End Time 14.00

Tue Start Time 10.00

Tue End Time 16.00

Wed Start Time 9.00

Wed End Time 15.30

Thur Start Time No Clinic

Thur End Time No Clinic

Fri Start Time No Clinic

Fri End Time No Clinic

Sat Start Time No Clinic

Sat End Time No Clinic

Sun Start Time No Clinic

Sun End Time No Clinic

Allow Diabetic

Username * terry

Add a member of staff to the diary

To do this go to: *System Admin* -> (black side menu) *Edit Staff* - > *Select the member of staff to add to the diary*

'Diary Sequence' – choose their position in the diary. Once this has been selected the days and times of the diary will open. The Optom can choose the days and times they are available for clinic. These will then be reflected onto the diary page.

Once optoms and dispensing opticians have set up their diary, the diary will look like this. The grey areas are non clinic times and appointments can't be added to these areas.

Practice Diary

High Street Optician Show Cancelled Appointments

Enter name or Patient ID here

Venue name

Terry Woodhouse Justine Rowe

Monday, 28 August 2023

Time	Terry Woodhouse	Justine Rowe
8 AM	Grey	Grey
8:10	Grey	Grey
8:20	Grey	Grey
8:30	Yellow	Grey
8:40	Yellow	Grey
8:50	Yellow	Grey
9 AM	Grey	Grey
9:10	Grey	Grey
9:20	Grey	Grey
9:30	Grey	Yellow
9:40	Grey	Yellow
9:50	Grey	Yellow
10 AM	Grey	Grey
10:10	Yellow	Grey
10:20	Yellow	Grey
10:30	Yellow	Grey
10:40	Yellow	Grey
10:50	Yellow	Grey
11 AM	Grey	Grey
11:10	Grey	Grey
11:20	Grey	Grey

Other members of staff can have access to the diary settings – such as 'Office' or 'Admin' staff who need to be able make diary appointments and also change the diary, without actually having a diary themselves.

Setting up how your diary works

You make general overall changes to how the diary works within System Admin, either with Diary or Data management (both can be found in the left hand menu).

System Admin -> Diary

Here you can add and make changes to appointment types, also add or change the appointment status types.

Event Type	Is Appointment	Is Obsolete
Administration	False	False
CL Aftercare	True	False
CL Trial	True	False
Col Overlay	False	True
Collection	True	False
Cyloc	False	True
Delivery	False	True
Diabetic Examination	True	True
Diabetic screening	True	True
Dilation	False	True

Edit Appointment Type

Here you will see a list of all current appointment types.

Name: CL Aftercare
Length: 30
Is Appointment:
Color: [Color picker]

When an appointment is selected you can change the name, appointment length, remove from the diary – mark as obsolete and also change the colour of the appointment.

The colours are reflected onto the appointments when made in the diary, enabling you to see at a glance the types of appointments in the diary.

Add Appointment Type

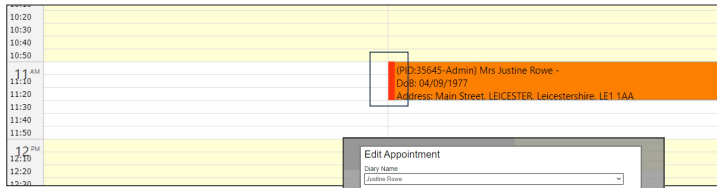
Here you can add a new appointment type. Complete all of the fields marked *.

Name: *
Length: *
Is Appointment?:
Color: *

Is Appointment? - Only tick for patient appointments. For events such as lunch or staff training do not tick, as the diary will ask for patient details if it thinks it is a patient appointment.

Add Status/Edit Status

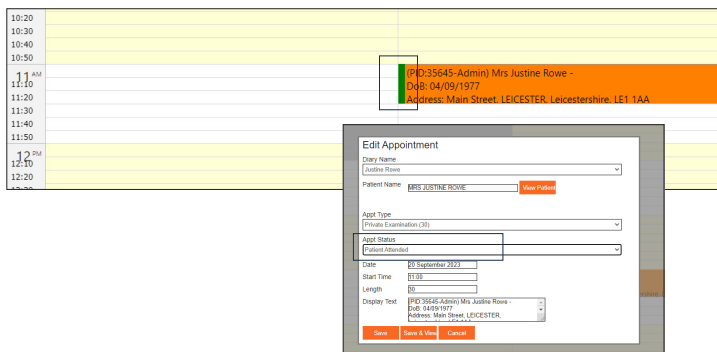
When appointments have been booked into the diary they have a coloured strip down the left hand side.



These coloured strips can be used to let you know the status of each appointment.

If you double click on an appointment in the diary an 'Edit Appointment' window will open.

You will see a drop down menu under 'Appt Status'. When this status is changed the coloured strip will also change to give you a quick visual reference as to the status of each appointment.



You can add a new appointment status and change the colour of existing ones in *System Admin* -> *Diary* -> *Add Status / Edit Status*

System Admin -> Data Management -> Edit Settings -> Diary Settings

Here you can make changes to how your diary views so that you can set it up in the best way for your practice.

Change the diary cell duration

When appointments are added to the diary they work within the parameters of the diary cells. The standard duration of a cell on the Blink diary is usually set to 10

minutes. If for example all of your appointments are 45 minutes long, you may want the cells to be set in blocks of 15 minutes. To change the cell duration, go to:

Diary Settings	
Diary Cell Duration (10,15,20,30)	10
Diary Days on view (1-7)	<input checked="" type="checkbox"/>
Show Who Booked Appointments (Y,N)	<input checked="" type="checkbox"/>
Diary Week View (Y, N, Always)	<input checked="" type="checkbox"/>
Allow Overlapping Appointments (Y,N)	<input type="checkbox"/>
External Booking Form - Appt Start Times	0900,0930,1000,1030,1100,1130,1200,1230,1300,1330,1400,1400,143
Start Week On Monday (Y,N)	<input checked="" type="checkbox"/>
Show Postcode First in Appointments (Y,N)	<input type="checkbox"/>
Allow Booked By Other (Y,N)	<input checked="" type="checkbox"/>
Show Patient Detail in Appointments (Y,N)	<input checked="" type="checkbox"/>
Show Apt Type in description (Y/N)	<input checked="" type="checkbox"/>
Update	

System Admin -> *Data Management* -> *Edit Settings*

Scroll down the page to 'Diary Settings' You can change the 'Diary Cell Duration' to 10, 15, 20 or 30.

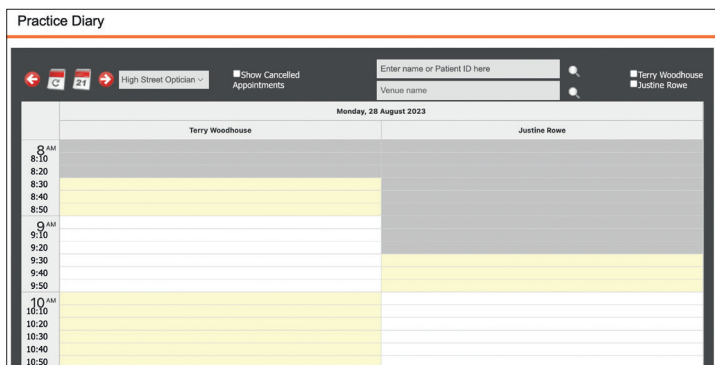
Within this window you can change other settings such as:

- the number of 'Diary Days on View'. This can be changed from 1 day to view through to 7 days to view – depending on your personal preference
- show who has booked an appointment into the diary
- show patient detail in appointment etc.

Always remember to press 'Update' when any changes are made.

Diary

Once all of your settings have been made to your diary it will look something like this. The grey areas are non clinic times and appointments can't be added to these areas.



All of the staff members with a diary will show in the top right-hand corner of the Diary page. You can choose whose diary you would like to see by ticking the box by their name

Adding an appointment to the diary

There are a few ways that an appointment can be added to the diary.

Directly into the diary.

On an available cell double click. (Patient appointments cannot be added to non clinic times – greyed out areas) This will open a 'Add New Appointment' window.

Add New Appointment

Diary Name: Justine Rowe

Booked By: Admin

Patient Name: MRS JUSTINE ROWE

Appt Type: Private Examination (30)

Appt Status: Scheduled

Date: 18 September 2023

Start Time: 10:00

Length: 30

Set Recurring Every: Weeks 0 Months 0 Years 0

Display Text: (PID: 35645-Admin) Mrs Justine Rowe -
DoB: 04/03/1977
Address: Main Street, LEICESTER.

Buttons: Save, Save & View, Cancel

- If you already have a patient selected they will automatically be added to the appointment.
- Select 'Find Patient' to find a patient that is already on your system, by name date of birth etc.
- Set the type of appointment 'App Type'
- The date and start time of appointment will already be populated.

When an appointment is entered into the diary you can choose to notify the patient by email or SMS or by printing a letter.

Select the 'Save and Notify' button and you will then be able to choose the method that you would like notify the patient - you can choose more than one method.

ADD NEW APPOINTMENT

Diary Name: Admin

Booked By: Admin

Patient Name: MR TERRY WOODHOUSE

Appt Type: Private Eye Test (45)

Appt Status: Scheduled

Date: 01 October 2024

Start Time: 09:00

Length: 45

Set Recurring Every: Weeks 0 Months 0 Years 0

Display Text: Mr Terry Woodhouse (Age: 72) - 07748500430

Appointment Reminder

Mr Terry Woodhouse thank you for booking an appointment with High Street Opticians

Appointment Date/Time: 01/10/2024 09:00:00
Appointment Type: Private Eye Test (45)
Appointment Status: Scheduled.

If you cannot make your appointment, please call 01234 56789

Practice Address:

Telephone: 01234 56789
Email: info@highstreet.co.uk
Website: highstreetopticians.co.uk

A pop up window will appear asking for confirmation that you are happy to send the notification. Once the notification has been sent a red bar will appear confirming it has been sent.

These notifications are set in *System Admin -> Data Management -> Edit Settings -> General Settings*. If the fields "Appt Confirmation Email" or "Appt Confirmation SMS" are blank then the defaults will apply.

The default SMS is:

*Your opticians appointment: Date and time
Practice name and address
To rearrange call xxxxxxxxx*

The default email is:

*Dear Mr Terry Woodhouse
Thank you for booking an appointment with Opticians Name
Your appointment details are:
Date/Time - 01/10/2024 09:00:00
Address:practice address*

*If you cannot make your appointment, please contact us as soon as possible to arrange an alternative
Telephone: practice telephone
Email: practice email
Website: practice website (if you have one)*

If you would like to change the default SMS or email message you can type your own message into the 'Appt Confirmation SMS' field.

Text entered into settings can include the following tags:

- [BR] = new line in SMS
- [PATIENTFORENAME]
- [PATIENTSURNAME]
- [APPTDATETIME]
- [PRACTICEADDRESS]
- [PRACTICETEL]
- [PRACTICEEMAIL]
- [PRACTICEWEB]
- [APPTTYPE]
- [APPTSTATUS]

Information inside of the brackets will be taken from the patients information within Blink.

Here is an example of how to format the message and how it will appear once it has been sent:

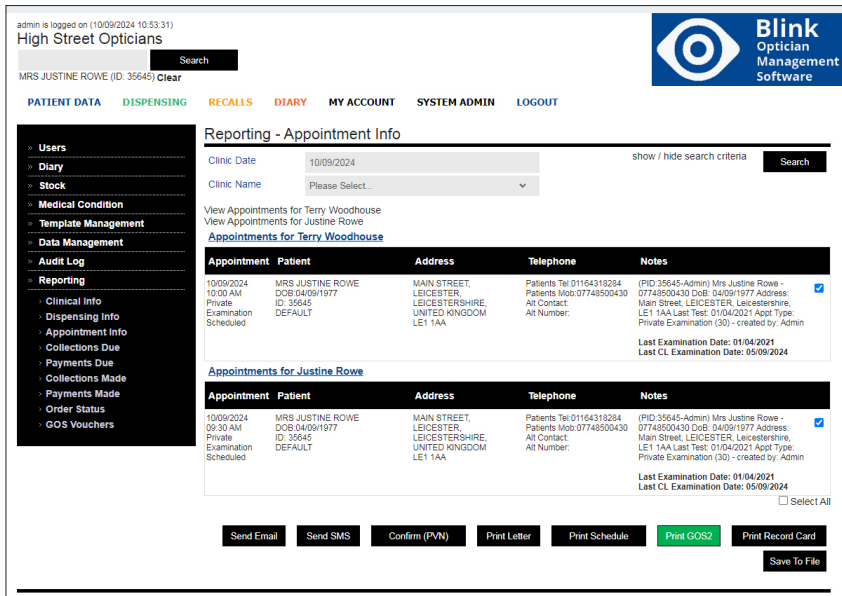
[PATIENTFORENAME] [PATIENTSURNAME] you have booked an eye test at High Street Opticians, [PRACTICEADDRESS] on [APPTDATETIME]. We look forward to seeing you. To rearrange please call us on [PRACTICETEL]

Terry Woodhouse you have booked an eye test at High Street Opticians, 2 Main Street, Leicester LE1 1LE on 05/10/24 09:30:00. We look forward to seeing you. To rearrange please call us on 0116123456

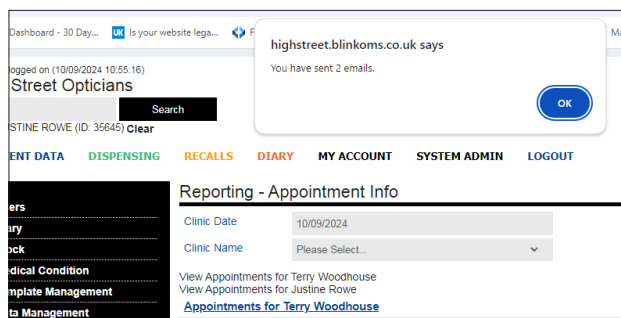
Please note that 1 SMS credit = 160 characters (including spaces), multiple credits will be used for longer messages.

Appointment SMS or email Reminders

SMS or Email Reminders can also be sent via *System Admin -> Reporting -> Appointment Info*



Choose the Clinic Date and the Clinic Name (leave for all clinics) and select and all booked appointments for that day will show in a list.



Select the patients you would like to send a notification to and press either 'Send Email' or 'Send SMS'. The message will automatically send and a pop up window will appear to let you know how many messages have been sent.

An example of the default email and SMS is:

Hello Terry, we would like to remind you that you have an opticians appointment on 01/10/2024 at 09:00 AM

You can change the default message via

System Admin -> Data Management -> Edit Settings -> General Settings -> Appointment Reminder SMS

You can include these tags within your message:

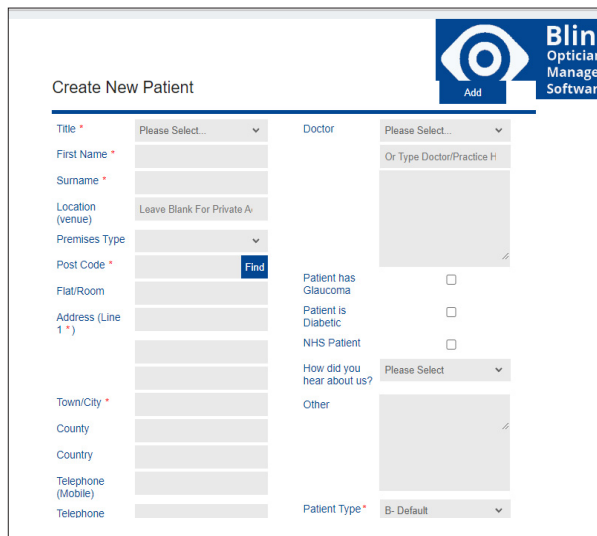
- [Patient] = full name incl title
- [Patient.Forename]
- [PatientName]
- [Date]
- [Time]

Adding a new patient to the diary.

To add a new patient to the diary you will first need to register them with your practice. You can do this whilst in the diary.

Go to diary and click on the cell date and time that you would like to add the new patient and their appointment.

Select the 'Add Patient' button. When you select this button it will open up a new window where you can create the new patients file in your Blink system.



Go through and complete as much detail as you can (it will save you time at a later date and the more detail you complete here the more will transfer across on GOS forms etc.)

Save and you will return to the diary. You will need to 'Select New Patient' and continue with their appointment details. When you have completed their new appointment click save and you will have a new patient in your Blink system and their new appointment in the diary.

From an external online booking system

If you have an online booking system – usually within a website, we can link the diary to it, so that appointments made appear in the Blink diary.

If you don't currently have an online booking system this is something that we offer. There are various options available:

All of our integrated online booking forms enable your patients can book directly into available slots in your Blink diary.

- This can be embedded into a website if you have one
- You can link to the stand alone version of the booking form directly from your google profile. Example of standalone form is:

<https://blinkoms.co.uk/blinkdiary/highstreet/booking/>
(note the colours can be changed and a logo can be added)

OR

- If you would like a more website feel to your booking form, this can include opening times and a google map etc.

An example of a booking form/single page website is <https://rochdaleopticians.co.uk/>

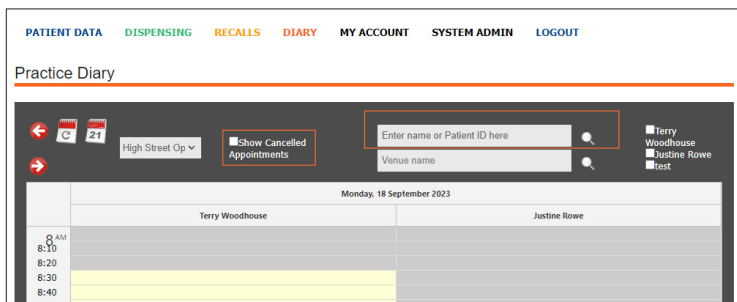
- We can also embed any of these forms into an existing website.

Please contact us if you would like to go through any of these options further.

Make changes to an existing appointment

By double clicking on an appointment you can make changes to it or view the patient summary. The 'Appt Status' drop down menu is where you can change the status of the appointment e.g., Patient Attended or Cancelled etc.

Find a patients appointment

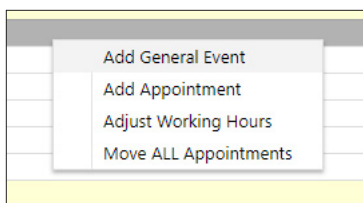


To quickly find a patients appointment in the diary use the search facility at the top of the diary. You can also view their cancelled appointments by ticking 'Show Cancelled Appointments'.

Add a general event such as lunch break or staff training

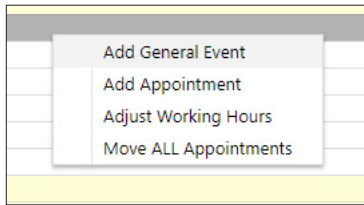
General events can be added to any part of the diary – the clinic and non clinic (greyed out areas)

If there isn't one already - you will need to create an event called Lunch or Staff Training etc. (See earlier instructions on adding an event/appointment).



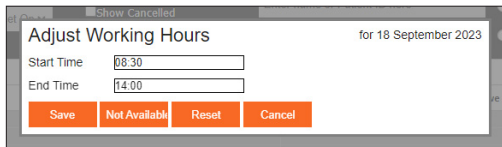
To add event to the diary (not an appointment) right click on the relevant cell and choose 'Add General Event' Under the drop down menu 'App Type' choose Lunch.

You can choose if you would like it be a recurring event. The recurring button will set the event on the same day for however many weeks you choose – a maximum of 52 weeks. You will need to go into each day of the week and do the same if you would like it to be a continuous event for each day alike.



This window that appears when you right click on a cell in the diary can be used for other things such as:

- Another way to add an appointment.
- Adjust working hours. This can be used to override the diary settings that have been set up for a user in their staff user settings. This can be useful if a staff member is away from work for a particular day for part of a particular day.



Right click on the day that you would like to amend. Choose Adjust Working Hours, change the times accordingly and save. The working hours/available clinic times will be changed for that day only.

Patient Appointment reminders

We can set up fully automated appointment reminders to your patients. These are sent in the first instance by an SMS text message followed by an email if the patient doesn't have mobile number stored in their patient data. These messages can be sent on a specified number of days before the booked appointment e.g. either on the day or any number of days in advance.

Let us know if you would like this to be set up for your practice. You would need a Fare Text account to be able to use this service. *See our SMS User Guide on how to set up an account.*

NEW FEATURE

Diary cell durations

A brand new feature of the Blink Diary enables users to manage their diaries independently of other users. The cell duration times can be set specifically to the needs of the individual user, their clinic times and appointment durations.

Please let us know if you would like this feature enabling on your Blink system.

Contact

If you need guidance regarding any aspect of Blink you can contact us on the support email, where we will always try to respond within 24 hours:

support@blinkoms.co.uk

Alternatively you can call us on the support line: 07748 500430

Or call the office phone: 0116 431 8284