Calendar & Availability Configuration

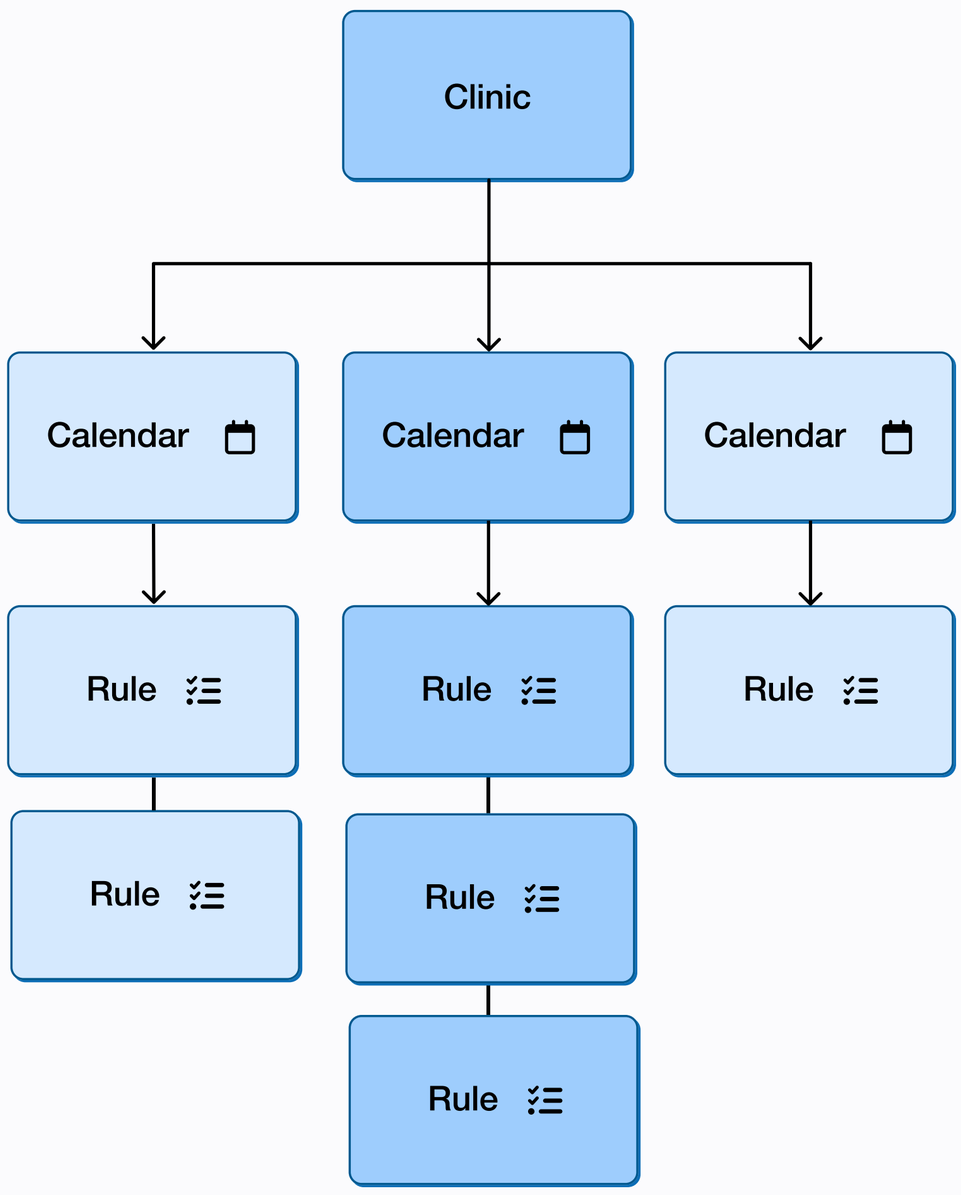
Introduction

The Clinic Owner Plus role has the same abilities as a Clinic Owner role, with additional abilities to create and edit calendars as well as availability rules. This new role now allows users to independently create and publish both internal and publicly-available appointment slots through calendars and availability rules in the admin console.

Organization	The facility running a Clinic.
Clinic	Each organization can host multiple clinics. Typically, organizations break up clinics based on location. For example, Fairview Hospital may have their main clinic and also host an off-site temporary private flu clinic: "Fairview Hospital" and "Fairview Hospital (Avon View High School)."
Calendar	Calendars are meant to mirror workbooks; generally, they contain groupings of availability rules for a certain service and product over a couple of weeks.
Availability Rules	An availability rule is what creates appointment slots for a given service and product. Availability rules that can be recurring or non-recurring and are defined by dates, the number of immunizers available (i.e., concurrent appointment slots), and the length of the appointment.

Availability Rules

- All availability rules and block rules can be seen on the Availability subtab within Clinics.
- Services and the corresponding products are now configured directly on availability rules.
- This configuration informs which appointment slots are shown on the booking page(s) and can be subsequently booked into.
- Once an availability rule is created and appointments are booked into it, it can no longer be edited.
- Availability rules can be duplicated onto their current or other calendars within the clinic at any time.

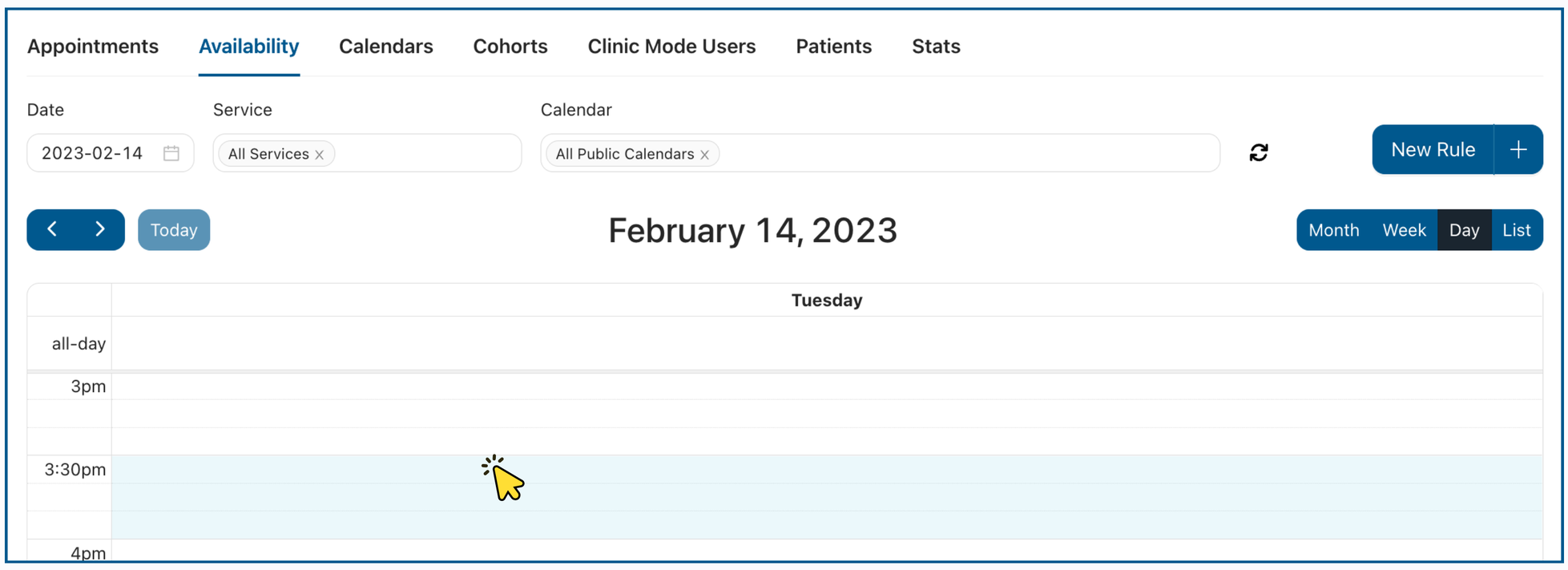


Step 1: Creating a Calendar

New availability pop-up modal

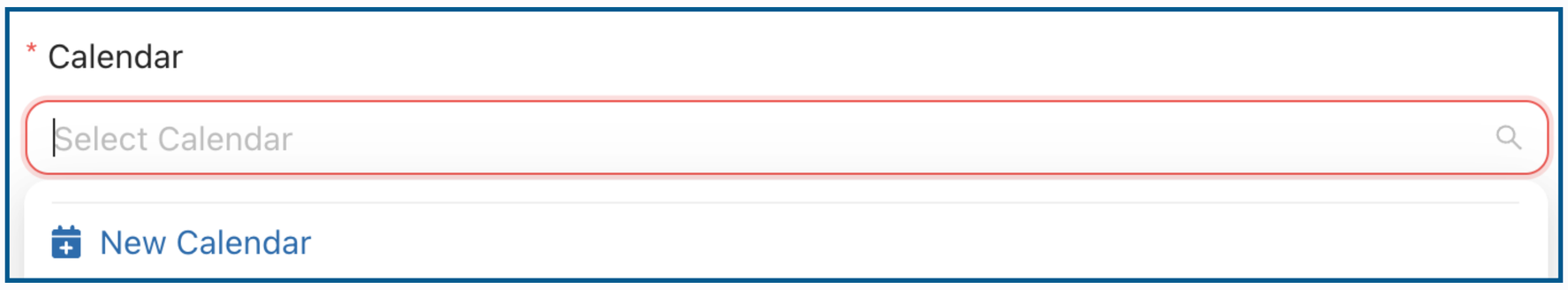
1 Begin by either:

↳ Clicking and/or clicking and dragging on the time portion of the calendar



↳ Clicking the New Rule + button and selecting "New Availability Rule" from the dropdown

2 Within the popup, click into the calendar dropdown and select the "New Calendar" option



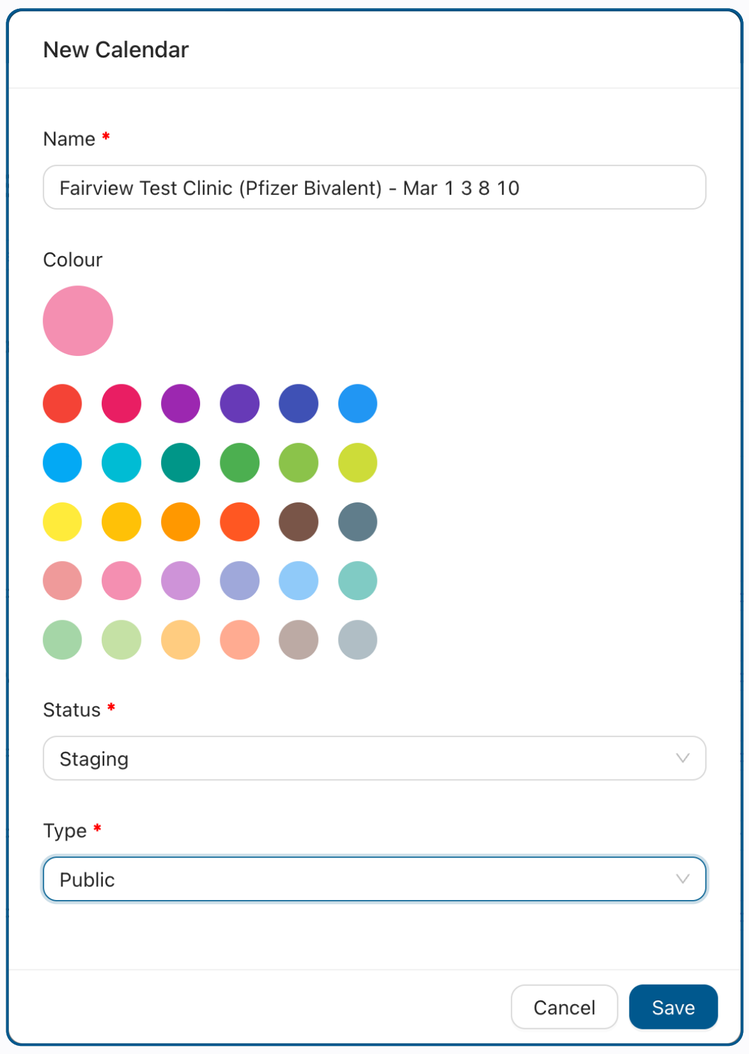
3 Within the pop-up modal, fill in the new calendar details. All four fields are mandatory but can be updated at any time.

Name: this is the name of the calendar

Color: this is the color that availabilities associated with this calendar will display as within the Clinics > Availability tab

Status: this dictates whether appointments associated to this calendar will display on booking pages that the clinic is linked to. The options are: Active, Staging, or Disabled

Type: this dictates whether appointments associated to this calendar will display on internal or on public booking pages. Internal or Public



4 Once the fields have been filled out, click "Save" to save your calendar.

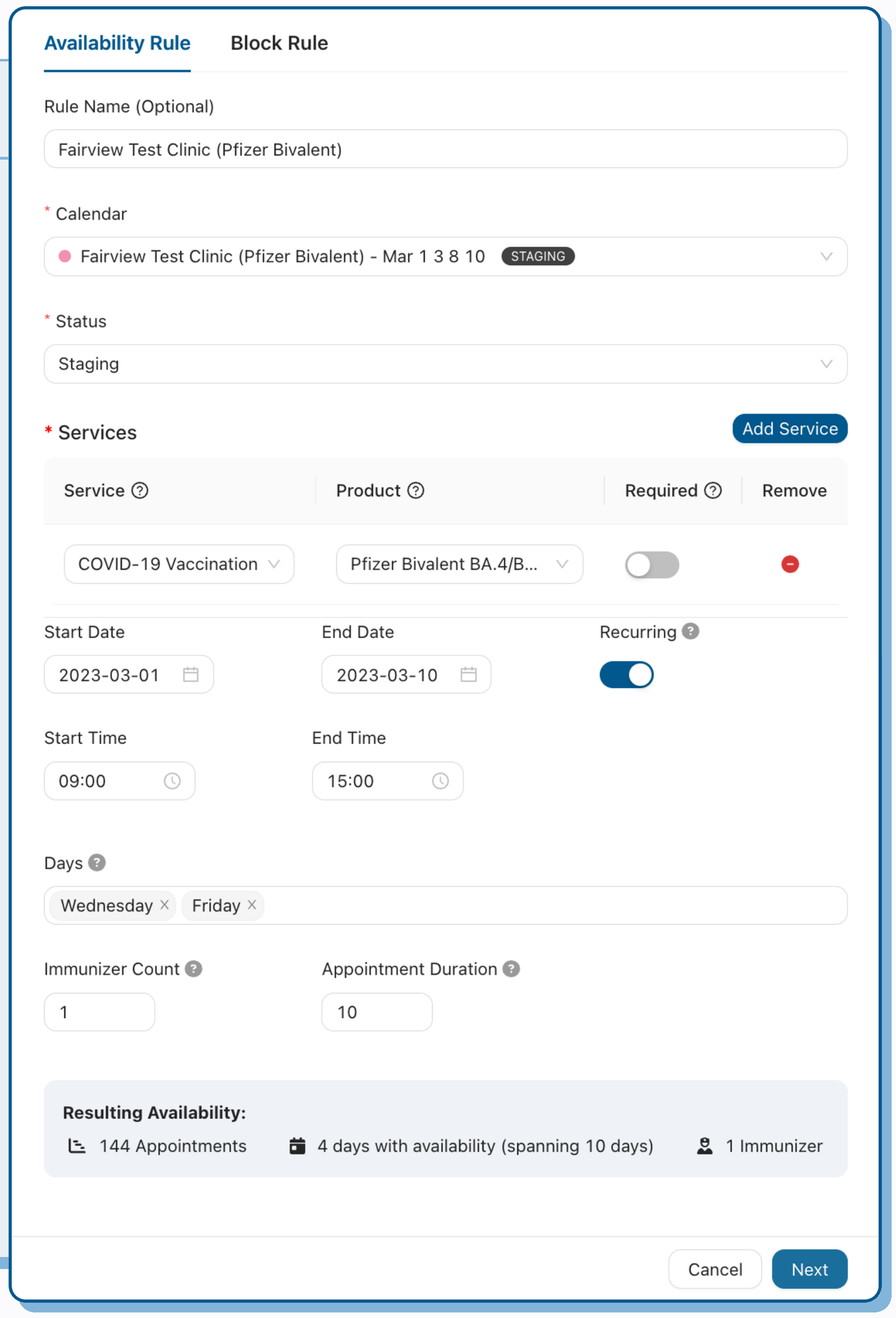
Step 2: Creating Availability Rules

New availability pop-up modal

1 Within the pop-up modal fill in the New Availability rule details.

Notes

- Rule names are optional, but all other fields within the availability rule are mandatory.
- Each availability rule must be linked to a calendar.
- Each availability rule must include at least one service and a corresponding product. In some cases, products can be designated as "Unknown."
- A given service can only be added to an availability rule once and only one product can be added per service
- The Required toggle determines whether the patient must select the given service to be able to book an appointment into the availability rule. *(This toggle is only relevant for availability rules with multiple services and does not impact rules with only one service).*



The Resulting Availability section updates in real time as the date, time, immunizer count, and appointment duration fields are updated. It summarizes the:

- Total number of appointments to be created
- Total number of days with appointments (over the entire time period)
- The immunizer count for the rule

2 Click Next move on to the Review Changes modal.

Before an availability rule is finalized, details and warnings about the rule including the resulting availability, status, concurrent availability, services, and booking page visibility are shown. This allows the user to double-check the availability that is set to be created and is designed to reduce accidental configuration errors.

Step 2: Creating Availability Rules

Review Changes modal

Before an availability rule is finalized, details and warnings about the rule including the resulting availability, status, concurrent availability, services, and booking page visibility are shown. This allows the user to double-check the availability that is set to be created and is designed to reduce accidental configuration errors.

The resulting availability section displays the same information as on the previous new availability rule view, with the exception that the number of appointments for all days with created availability can be seen by clicking “Show All Days”:

Resulting Availability:

140 Appointments | 4 days with availability (spanning 10 days) | 1 Immunizer

Show All Days

If the availability rule status is set to staged or disabled, the following explanatory sections are shown to the user below the resulting availability section:

Rule is Disabled
This rule has a status of **DISABLED** which means no availability will be accessible.

Rule is Staged
This rule has a status of **STAGING** which means its availability will not be visible on any booking page.

When a new rule has concurrent service availability with existing rules that are configured with different products, the warning below is shown. Concurrent availability warnings are restricted to public availability only and do not include overlapping availability from internal calendars.

When rules or calendars are set to staged, a tag appears next to the rule name within this section:

Warning - Concurrent Service Availability with Different Products
Creating this availability rule would create concurrent availability for the same service using different vaccine products, which is strongly discouraged.
The following rules would have concurrent availability:

- Fairview Test Clinic - Moderna Bivalent
- Fairview Test Clinic (Pfizer Bivalent) STAGED RULE

Booking page visibility

If the Clinic is attached to a booking page - this section will say: “The clinic has been connected with the following booking pages:”

Booking Page Visibility
This clinic has been connected with the following booking pages:

- Fairview - Public appointments

To add this clinic to a new booking page, go to the Booking Pages tab, or contact your administrator if you lack the required permissions.