# ClinicFlow for the Clinic Owner Plus role: Calendar & Availability Rule Configuration

May 15, 2023

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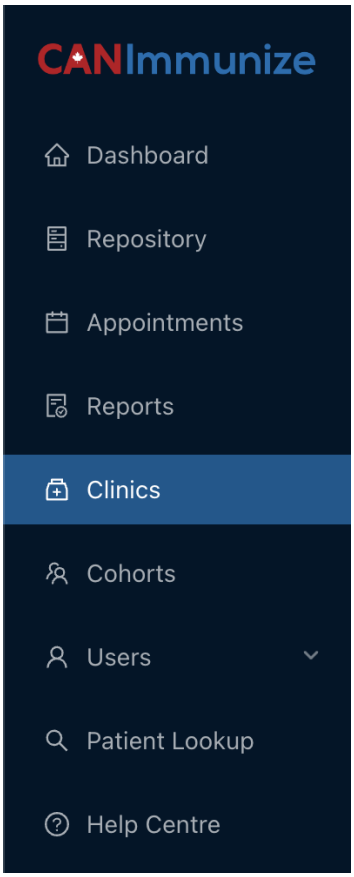



## Introduction

This document will serve as a step-by-step guide for ClinicFlow users with the **Clinic Owner Plus** role. As a user with this role, you will have access to the tabs shown to the left.

This new role has the same abilities as the Clinic Owner role, with additional access to create and edit calendars and availability rules. This access allows users to independently create and publish both internal and publicly-available appointment slots.

**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.

These new abilities are accessed within the main Clinics tab. Calendars and availability rules can be created and managed from both the Availability and the Calendars subtabs, although the recommended workflow will be detailed in this guide.

| Key Terms | Description |
|---|---|
| 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 Rule | An availability rule is what creates appointment slots for a given service and product. Availability rules can be recurring or non-recurring and are defined by dates, times, the number of immunizers available (i.e., concurrent appointment slots), and the length of the appointments. |

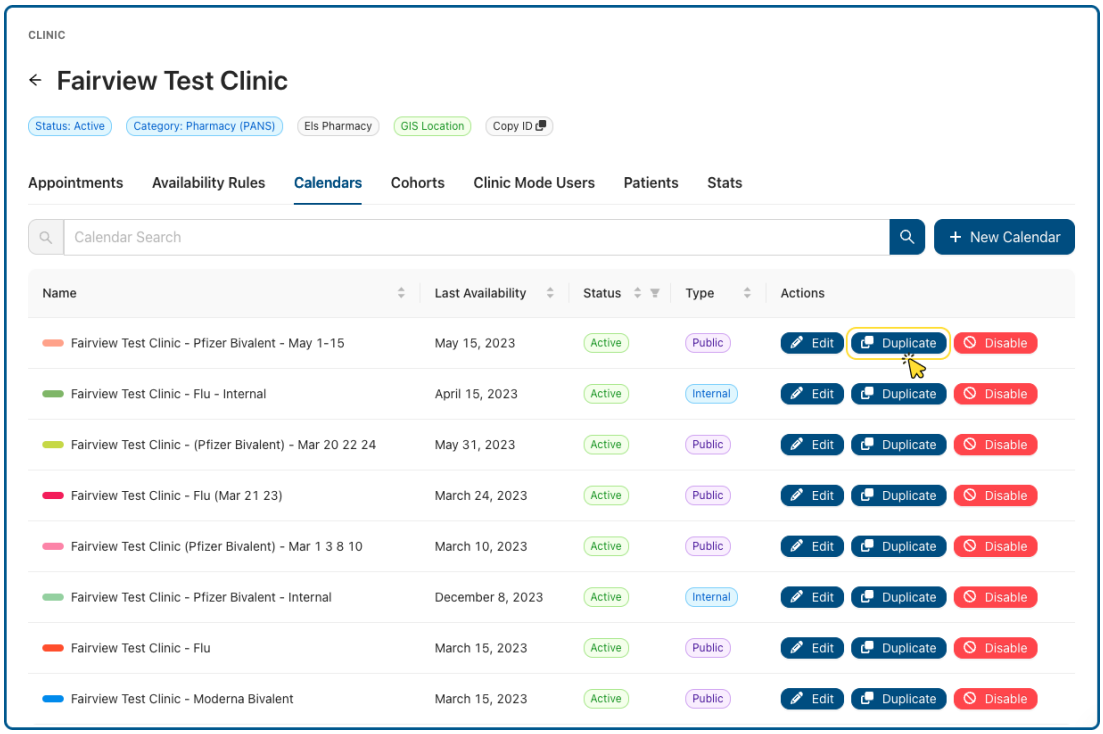
# Workflow

There are several ways to approach the calendar set up:

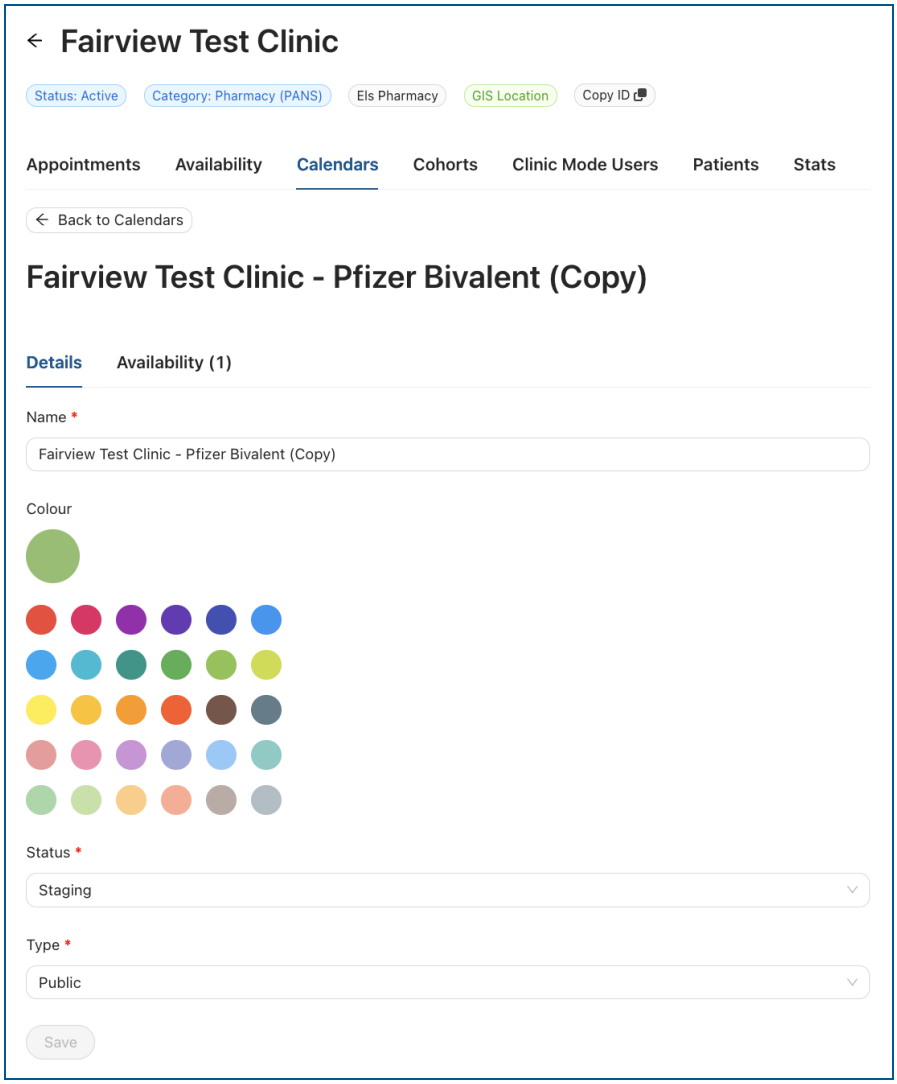
- If your clinic has a consistent schedule, it's best to duplicate the calendar and then modify the availability rules to save time.
  ***Note:*** *When you duplicate a calendar, all associated availability rules will also be duplicated.*
- If you're creating a new schedule, create a calendar from the Calendars subtab and then create the Availability rules from within the calendar.
  ***Note:*** *You can also create a new Calendar from within a new Availability rule.*

## Duplicating a Calendar

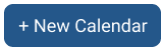
1. Duplicate an existing calendar. The new calendar will automatically have a status of "Staging" and will contain all availability rules that were on the original calendar.




2. 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

1. Create a new calendar from the Calendars tab by clicking on 

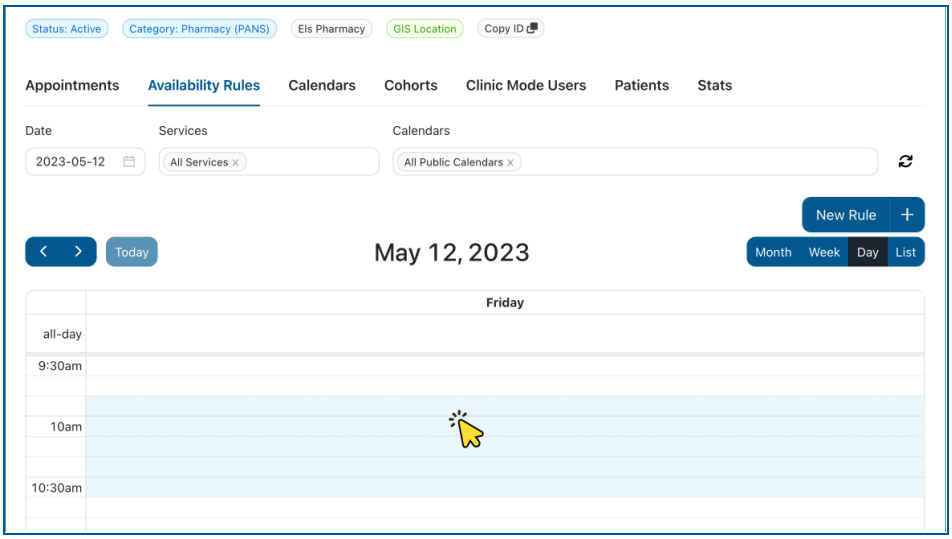
2. Within the pop-up window, fill in the new calendar details. All four fields are required but can be updated at any time.
    a. **Name:** This is the name of the calendar. *Please refer to pages 15 and 16 of this guide for colour & naming conventions.*
    b. **Colour:** Availability rules associated with this calendar will display as the selected colour of the calendar within the Clinics > Availability tab.
    c. **Status:** This dictates whether appointments associated with this calendar will display on booking pages that the clinic is linked to. The options are: Active, Staging, or Disabled.

d. **Type:** This dictates whether appointments associated with this calendar will display on internal or on public booking pages. The options are: Internal or Public.

3. Once all four fields have been filled out, select the “Save” option to save your new calendar.

## Creating an Availability Rule

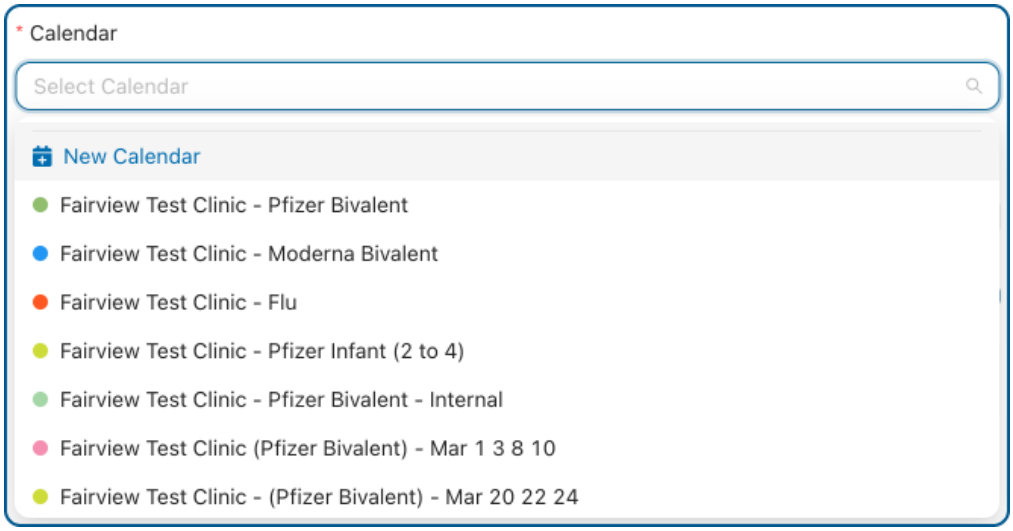
1. Begin by either:
   a. Clicking and/or clicking and dragging on the screen



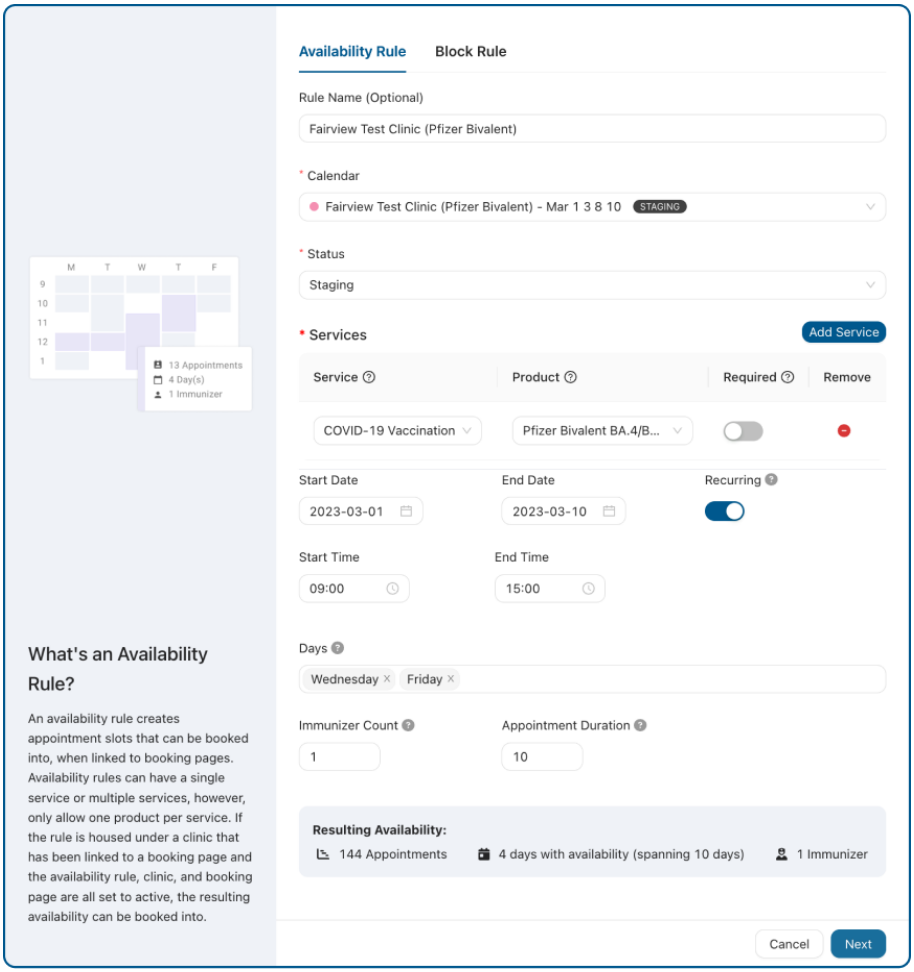

   b. Clicking the

button and selecting “New Availability Rule” from the dropdown

2. Within this pop-up window, click on the calendar dropdown to select a calendar. From here you can also create a New Calendar for this availability rule.



3. Within the pop-up window, fill in the New Availability rule details.

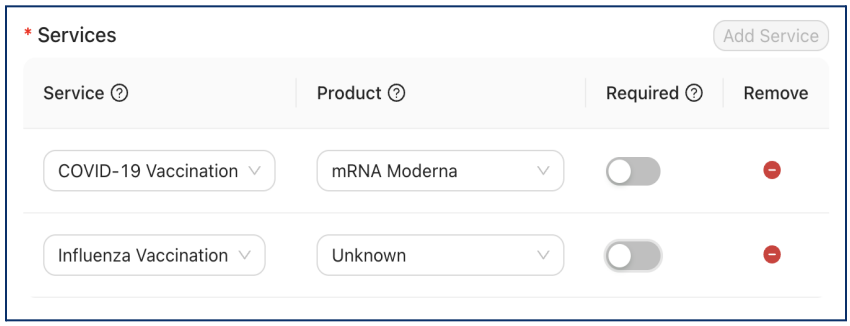



Please note:

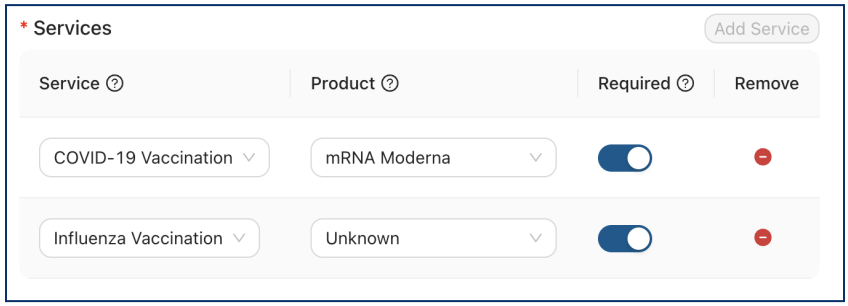
- Rule names are optional, however, all other fields within the availability rule are mandatory.
- Each availability rule must be linked to a calendar and must include at least one service and a corresponding product. In some cases, products can be designated as “Unknown.”
- A given service can only be added to an availability rule once and only one product can be added per service (i.e. you cannot add two separate COVID-19 vaccines that are within the same service to one availability rule, they must be added to two separate availability rules).
- 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 following four scenarios are possible for availability rules with two services:

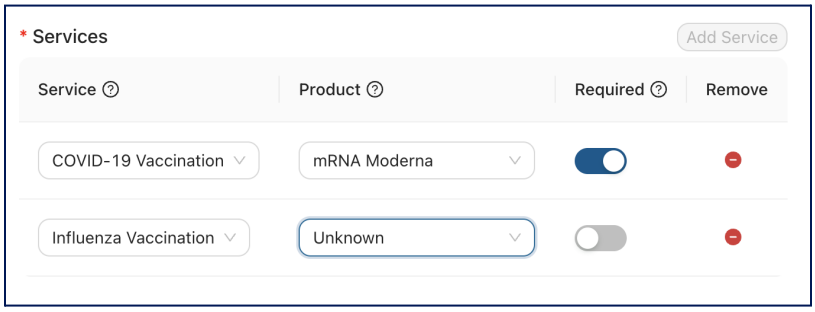
1. **Neither service is required.** The patient can book COVID-19 and/or can book Influenza. This availability will show on the booking page to patients who select any of the following service combinations:
    - Book a COVID-19 (Moderna) and Flu appointment
    - Book only a COVID-19 (Moderna) appointment
    - Book only a Flu appointment



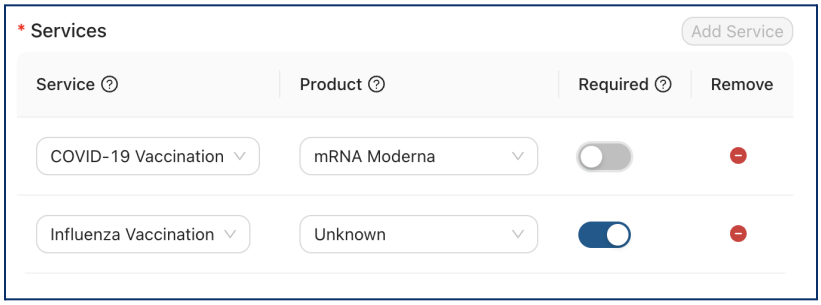

2. **Both services are required.** The patient must book COVID-19 *and* Influenza. This availability will show on the booking page to patients who select only the following service combination:
    - Book a COVID-19 (Moderna) and Flu appointment




3. **Only the COVID-19 service is required.** The patient must book COVID-19 and can book Influenza. This availability will show on the booking page to patients who select either of the following service combinations:
    - Book a COVID-19 (Moderna) and Flu appointment
    - Book only a COVID-19 (Moderna) appointment

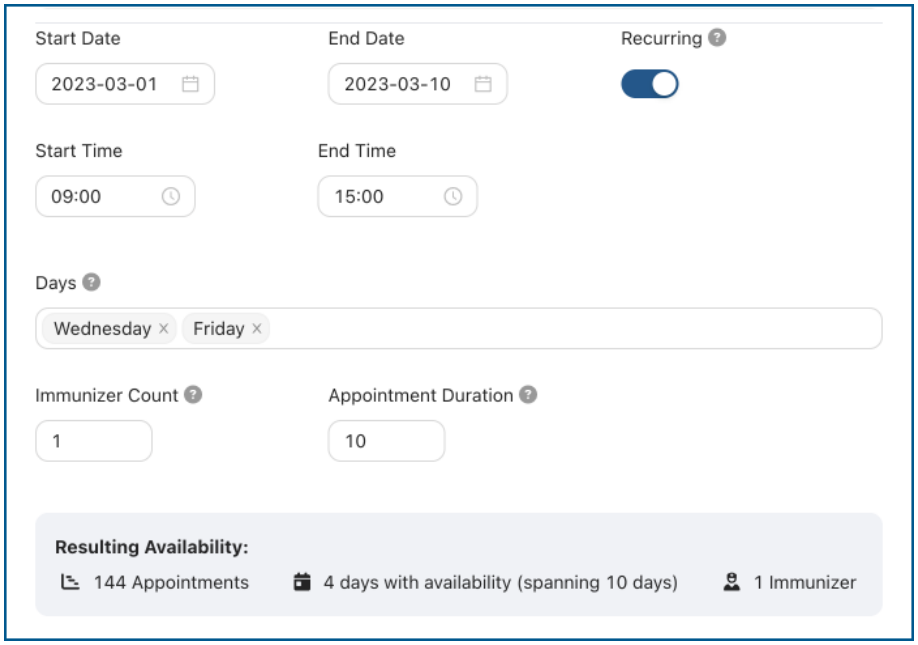


4. **Only the Influenza service is required.** The patient must book Influenza and can book COVID-19. This availability will show on the booking page to patients who select either of the following service combinations:
    - Book a COVID-19 (Moderna) and Flu appointment
    - Book only a Flu appointment

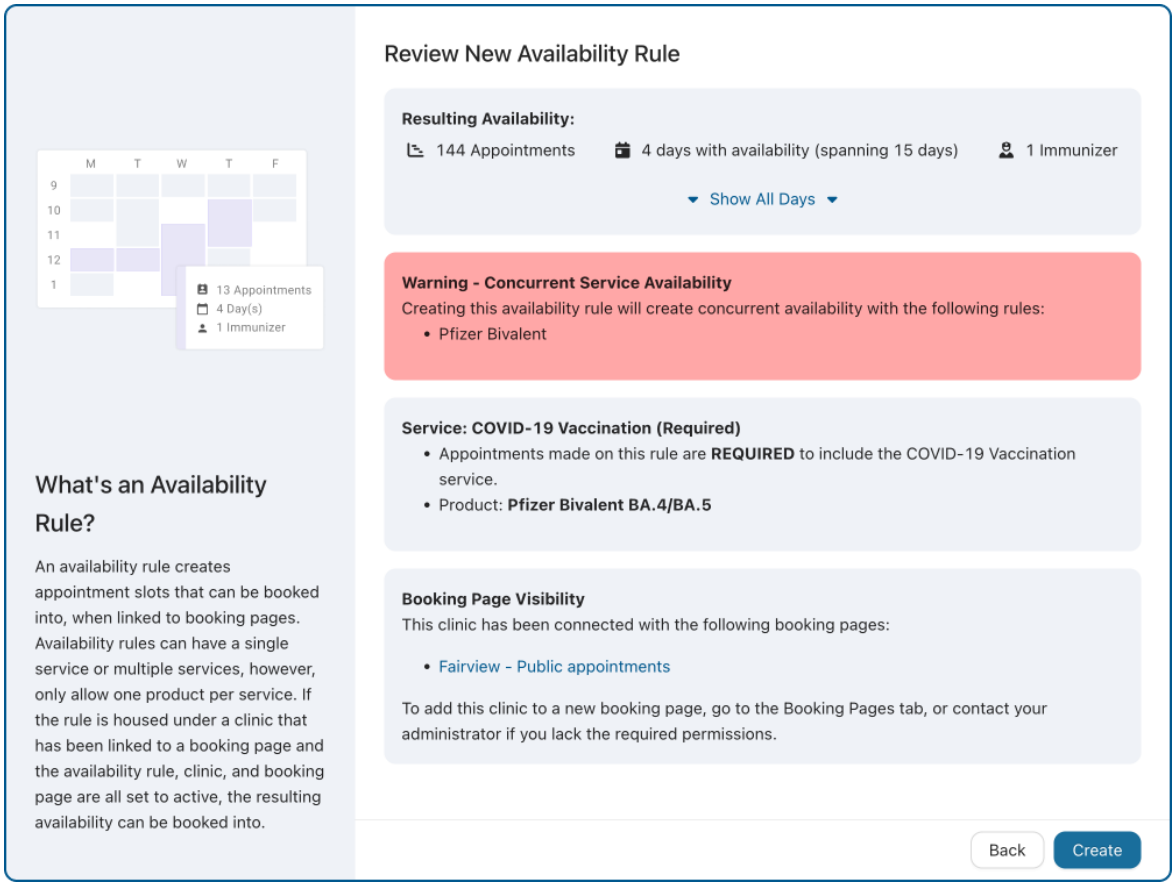



The "Resulting Availability" section at the bottom of the window updates in real time as the date, time, immunizer count, and appointment duration fields are updated and summarizes the:

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




**Review Changes window:** Before an availability rule is finalized, further details and warnings about the rule including the resulting availability, status, concurrent availability, service(s), product(s) and booking page visibility are shown. This allows the user to double-check the availability that is about to be created and is designed to reduce accidental configuration errors.




The **resulting availability** section at the top displays the same information as on the previous new availability rule view, with the addition of the number of appointments for all days with created availability can be seen by clicking “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 Staged**
This rule has a status of **STAGING** which means its availability will not be visible on any booking page.

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

***Note:*** *If the availability rule status is set to active, this warning section is not displayed.*

When a new rule has **concurrent service availability** with existing rules, the warning below is shown. Concurrent availability warnings are not shown for internal calendars or rules with a status of "Disabled." When rules or calendars are set to "Staged," a tag appears next to the rule name.

**Warning - Concurrent Service Availability**
Creating this availability rule will create concurrent availability with the following rules:
- Pfizer Bivalent

The services and products that have been configured are displayed in the next section. If the **"Required" toggle is set to OFF** for a given service, this section will say: "Appointments made on this rule MAY OR MAY NOT include the [COVID-19/Influenza/etc] Vaccination service."

**Service: COVID-19 Vaccination**
- Appointments made on this rule **MAY OR MAY NOT** include the COVID-19 Vaccination service.
- Product: **Pfizer Bivalent BA.4/BA.5**

If the **"Required" toggle is set to ON** for a given service, this section will say: "Appointments made on this rule are REQUIRED to include the [COVID-19/Influenza/etc] Vaccination service."

**Service: COVID-19 Vaccination (Required)**
- Appointments made on this rule are **REQUIRED** to include the COVID-19 Vaccination service.
- Product: **Pfizer Bivalent BA.4/BA.5**

**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." If an availability rule will not show on a booking page right away, an explanatory message will be shown.

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

- Fairview - Public appointments

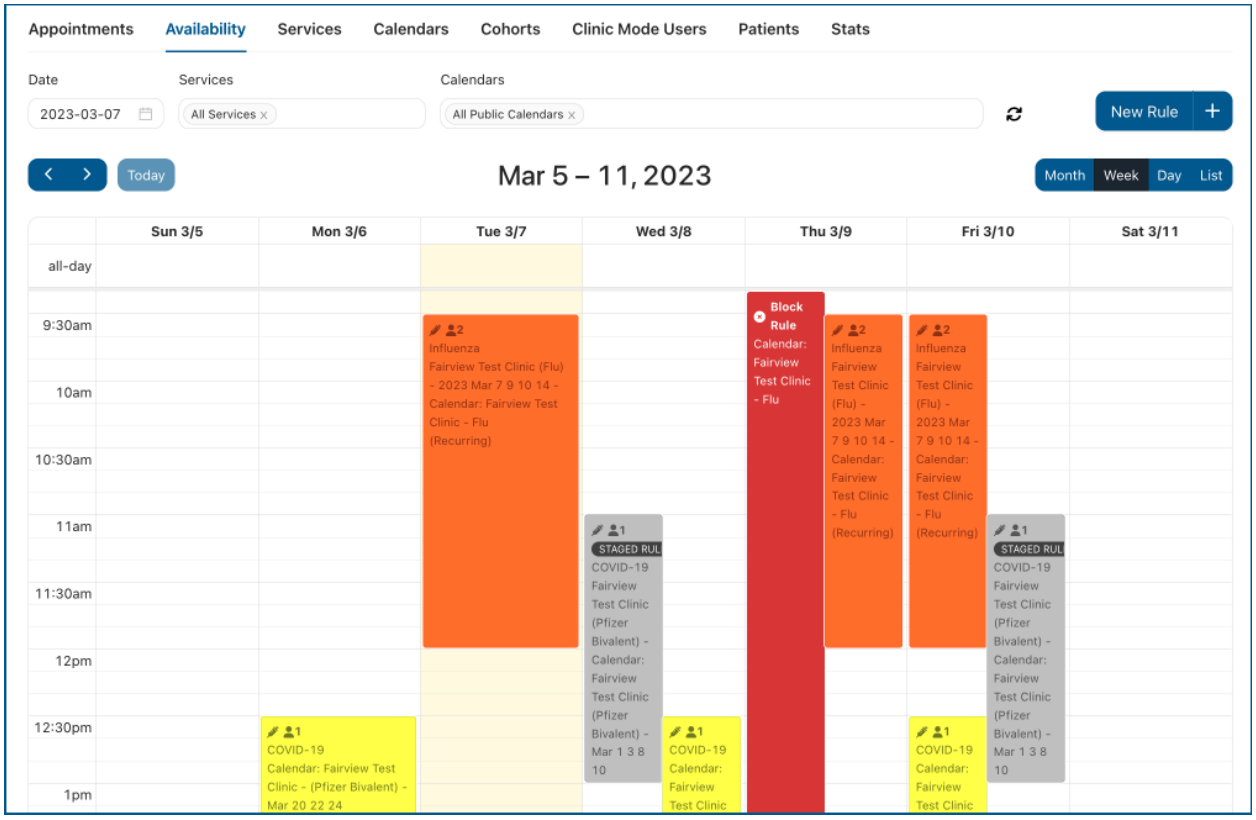
To add this clinic to a new booking page, go to the Booking Pages tab, or contact your administrator if you lack the required permissions.

## Creating Additional Availability Rules

1. Select the

button to add additional availability rules to your calendar.
2. Within the Calendar option, select a pre-existing Calendar.
3. Fill in the other fields within the rule as described in the previous section.

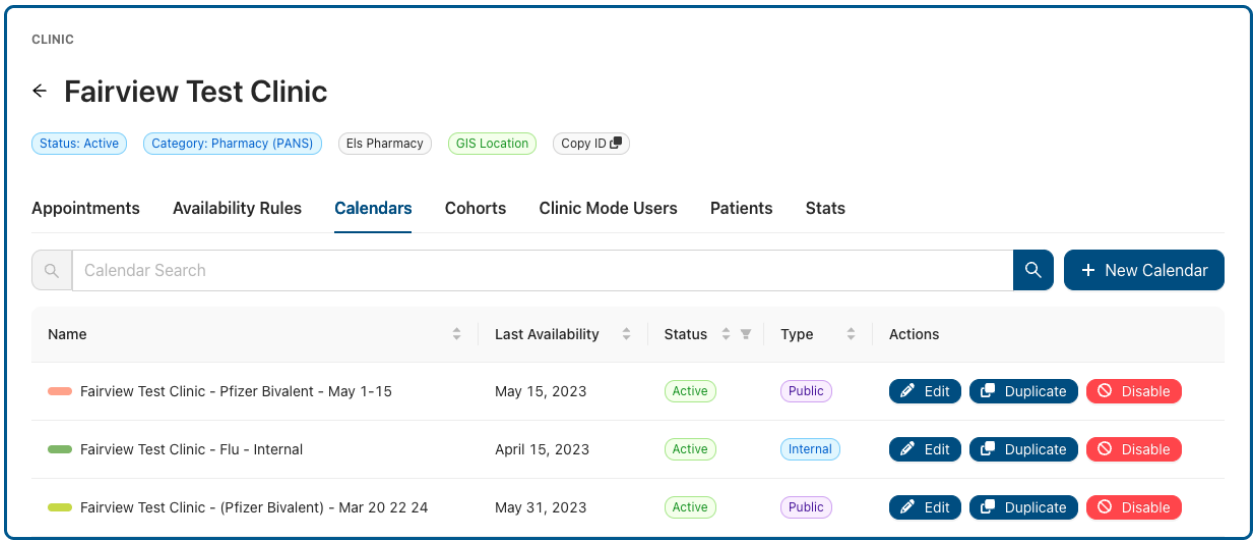
## Checking Availability Coverage in the Availability Tab




All availability rules and block rules within a clinic can be seen within the availability tab. Similar to the appointments tab, they can be filtered by date, service(s), and calendar(s). The default display is today's date, all services linked to the clinic, and all public calendars. Calendars can be different colours, making it easier to see which availability rules correspond to which calendars in this view. Staged calendars and rules are set to grey and have the corresponding tag.

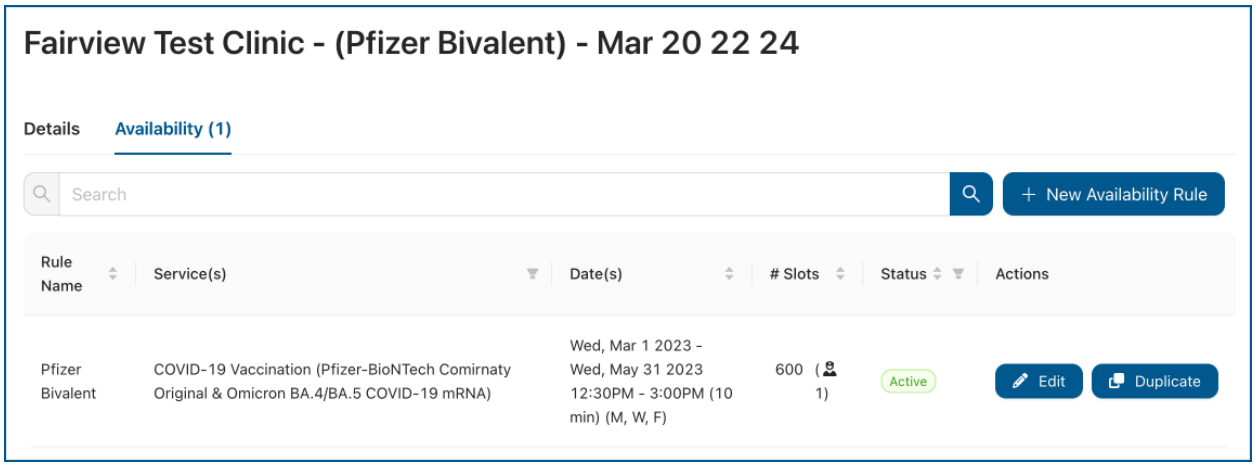
## Calendar and Availability Rule Management

1. Begin by opening the Calendars subtab within the Clinic. Here, you can see a listing of all the calendars created for your clinic. New calendars can also be created from here.

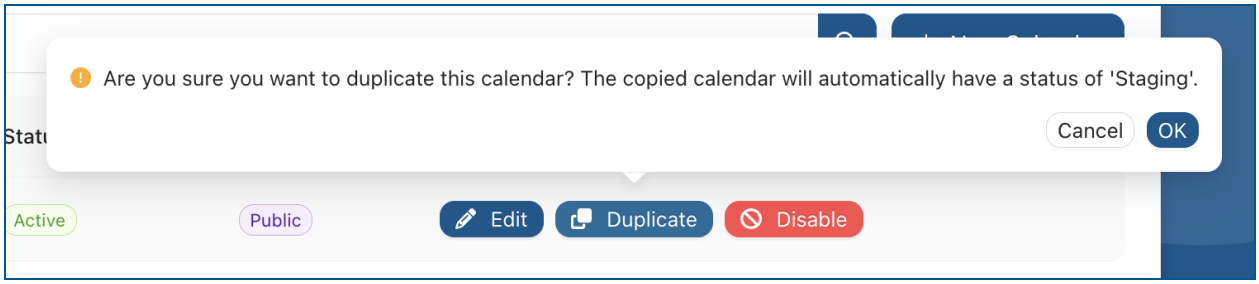



When the **Edit** button on a calendar is clicked, two configuration tabs appear:

1. **Details:** Contains the same four fields as the new calendar configuration
2. **Availability:** Shows a table of all availability rules that have been created on the calendar. Existing availability rules can be edited by clicking the "Edit" button and new availability rules can be created by clicking the "New Availability Rule" button. The columns in this table can be filtered and sorted.

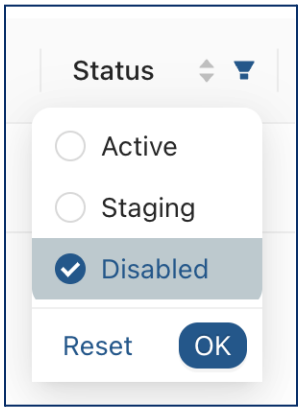



The **Duplicate** button duplicates all the rules and information from a given calendar and creates a new calendar. Any duplicated calendars are set to staged by default.




**Duplicating Availability rules**: Once an availability rule is created and appointments are booked into it, it can no longer be edited. However, availability rules can be duplicated onto their current or other calendars within the clinic at any time. Any availability rule can be duplicated by selecting the Duplicate button located on availability rules in Clinic → Calendars → Select a calendar → Availability Rules.

Clicking the duplicate button opens a window with an exact duplicate of the previous availability rule but the "next" button at the bottom is not clickable until at least one field is changed.




The **Disable** button updates the calendar's status to disabled and automatically hides it from the list view. Active and staging calendars are shown in the default list view, whereas disabled calendars can be viewed by clicking the filter icon in the status column.

## Blocking Calendars

1. Navigate to the Clinics Tab, then select the intended Clinic for which you will be inputting a Block Rule.
2. Then Select the "Availability" tab.
3. Create a new Block Rule by drag 'n dropping your mouse beside an existing availability. Or click

to open the rule settings.
4. When creating a new block rule, select the calendar that it will impact and the start and end dates and times of the block rule.
5. The Block Rule will display in red beside the existing availability.
6. Internal Calendars don't need calendar blocks because they are not available to the public.

# Calendar Naming Convention

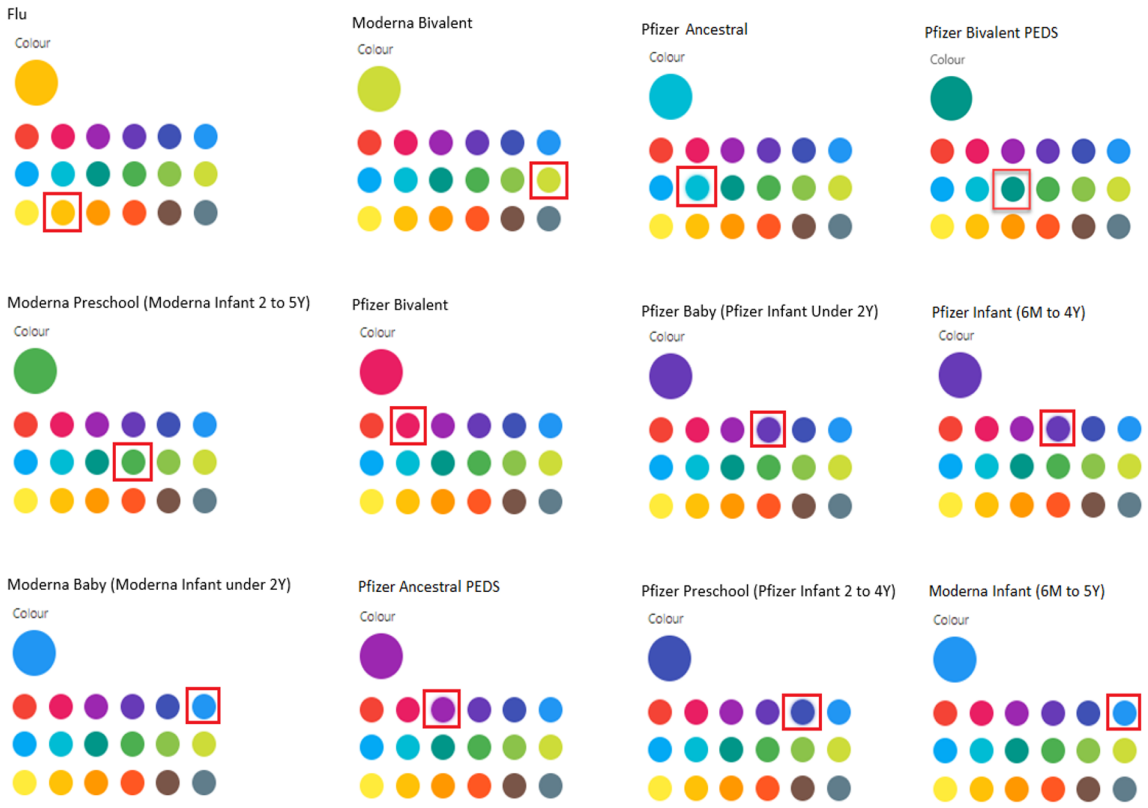
For a Clinic at a Pharmacy

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

For a Clinic at a different location

- Pharmacy Name Location (Vaccine) - 2023 Mar…
- i.e. Shoppers Drug Mart Dartmouth High (Pfizer Bivalent) - 2023 Mar 1 2 15

## Colour Codes for Calendars




| Workbook Vaccine Name | Technical Vaccine Name | Dropdown Vaccine Name |
|---|---|---|
| (Pfizer Bivalent) | (Pfizer-BioNTech Comirnaty Original & Omicron BA.4/BA.5 COVID-19 mRNA) | Pfizer Bivalent BA.4/5 |
| (Pfizer Baby) | (Pfizer-BioNTech Comirnaty COVID-19 mRNA infant) | Pfizer Infant under 2Y |
| (Pfizer Preschool) | (Pfizer-BioNTech Comirnaty | Pfizer Infant 2Y to 4Y |

| | | |
|---|---|---|
| | COVID-19 mRNA infant) | |
| (Pfizer Bivalent PEDS) | (Pfizer-BioNTech Comirnaty Original & Omicron BA.4/BA.5 COVID-19 mRNA pediatric) | Pfizer PEDs 5 to 11 Bivalent BA.4/5 |
| (Pfizer Ancestral PEDS) | (COVID-19 Pfizer-BioNTech Comirnaty pediatric 5 to 11 years) | Pfizer PEDs 5 to 11 |
| (Pfizer Ancestral) | (PFIZER-BIONTECH COVID-19 mRNA) | Pfizer Original 12+ |
| (Moderna Bivalent) | (Moderna Spikevax Bivalent (Original / Omicron BA.4/BA.5) 0.10 mg/mL COVID-19 mRNA) | Moderna Bivalent BA.4/5 |
| (Moderna Preschool) | (Moderna Spikevax Blue Cap 0.10 mg/mL COVID-19 mRNA) | Moderna Infant 2 to 5Y |
| (Moderna Baby) | (Moderna Spikevax Blue Cap 0.10 mg/mL COVID-19 mRNA) | Moderna Infant under 2Y |
| (Moderna Ancestral) | (Moderna Spikevax Red Cap 0.20 mg/mL COVID-19 mRNA) | Moderna Original 12+ |
| *OLD DO NOT USE (Moderna Bivalent) | (Moderna Spikevax Bivalent (Original / Omicron BA.1) 0.10 mg/mL COVID-19 mRNA) | Moderna Bivalent BA.1 |
| (Flu 6M and over) | Influenza Vaccination (Unknown) | Influenza 6M+ |
| (Flu 2Y and over) | Influenza Vaccination (Unknown) | Influenza 2Y+ |
| (Flu 5Y and over) | Influenza Vaccination (AFLURIA TETRA®) | AFLURIA TETRA (5ml MDV) |
| (Moderna Infant 6m-5y) | (Moderna Spikevax Blue Cap 0.10 mg/mL COVID-19 mRNA) | Moderna infant 6m+ |
| (Pfizer Infant 6m-4y) | (Pfizer-BioNTech Comirnaty COVID-19 mRNA infant) | Pfizer infant 6m+ |