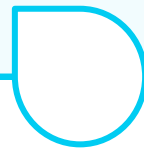


User Guide

Appointment Planner
Version 3.4.0



Last update :
May 3, 2020



Questions?

info@trimoz.com

Technical support :

support@trimoz.com

1-844-669-2474 or (418) 669-2474 Ext. 1



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(Settings, Statistics)

N: NEW

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Schedules, Appointments,
Follow-Ups)

N NEW

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1. User Booking Process

Section A

Introduction

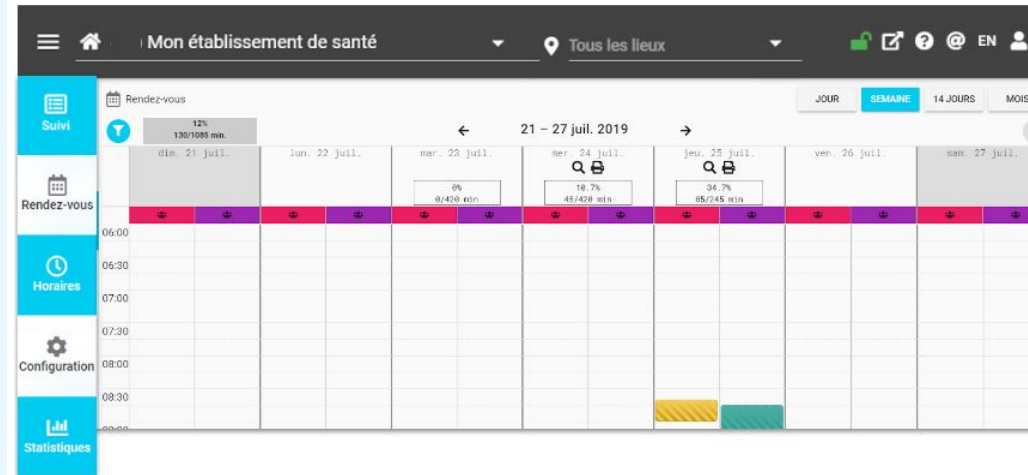


1. General Overview
2. Login
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4. Logging out

1. General Overview

Clichealth is an online booking platform solution adapted for services provided by healthcare professionals.

Our technology manages complex appointment booking and scheduling. Patients will be serviced at the right time, in the right place, and by the right healthcare provider.



The screenshot shows the online booking service interface for 'CLIC SANTÉ .CA'. The page features a banner with a smiling woman and child, and a navigation bar with options like 'PRENDRE UN RENDEZ-VOUS', 'ANNULER UN RENDEZ-VOUS', and 'NOUS JOINDRE'. Below the banner, there is a welcome message: 'Bienvenue sur la page de réservation de votre centre de santé !'. At the bottom, there is a four-step booking process: 1. Sélectionnez un service, 2. Sélectionnez le lieu, 3. Sélectionnez le moment, 4. Complétez votre réservation.

Appointment planner

- Services setup
- Open the schedule
- Manage and follow-up with your appointments

Online booking service

- Personalized messages
- Display availabilities
- Easy booking process
- Online booking for patients

2. Login

2.1 Login

In order to access the planner, we need to create your login code.

Please ensure your computer and browser are updated. Our platform works with all new and updated web browsers.

Click on this link::

1. <https://admin3.clicsante.ca/login>
2. Enter your email address
3. Create a password
4. Click to log in

Didn't receive your login code ? Contact our Support Team:
1-844-669-2474 ext 1 or support@trimoz.com

2.2 Forgot your password?

5. Click on the link **Forgot password**? We will send you a link to reset your password.

1 <https://admin3.clicsante.ca/login>

2 Courriel

3 Mot de passe

4 SE CONNECTER

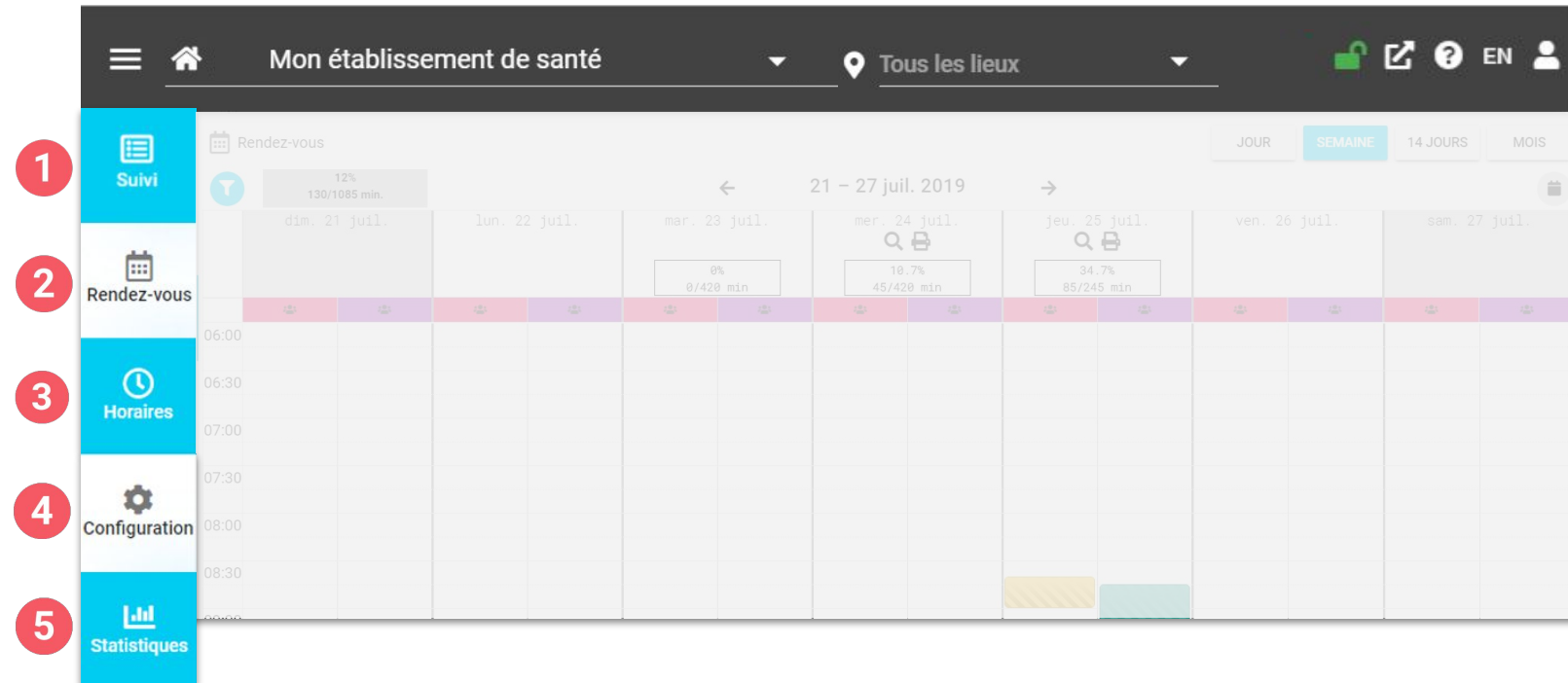
5 [Mot de passe oublié?](#)

3. Planner Overview

3.1 Main menu

Main menu appears on the left side of your screen and displays all sections of the planner.

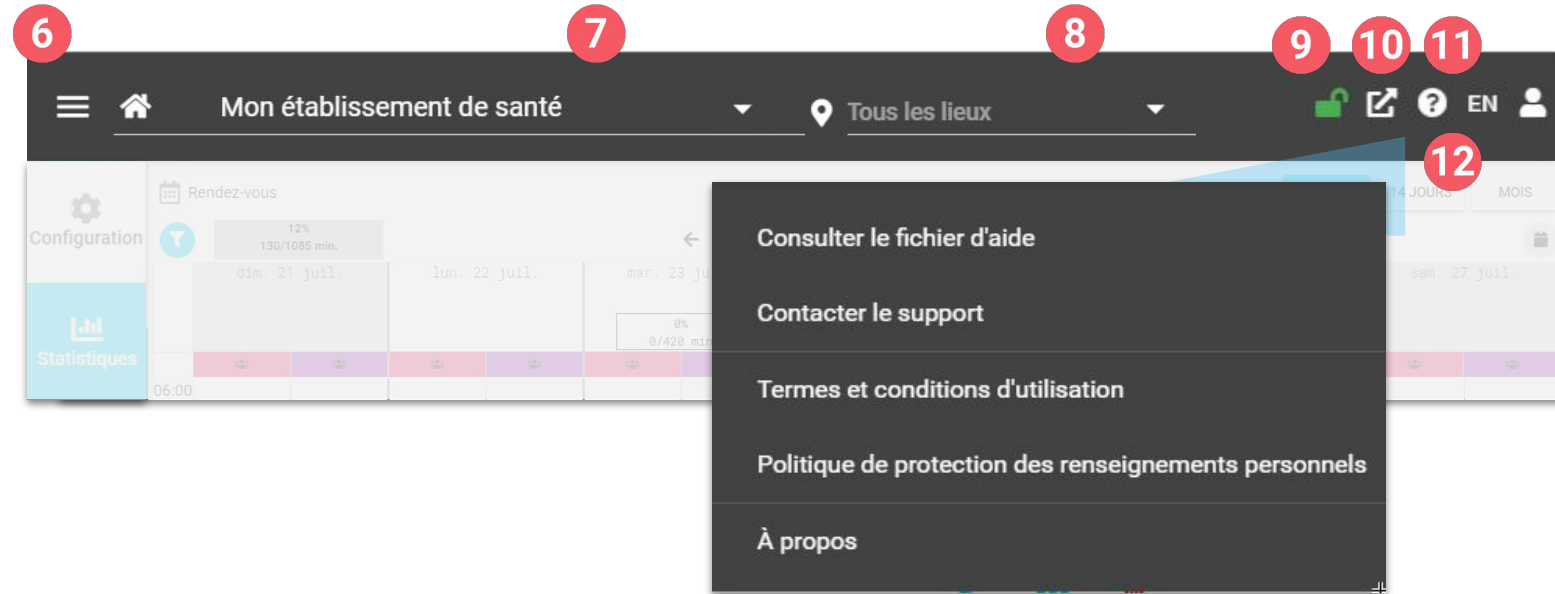
1. The **Manage** menu lets you to see the appointment listing, manage or look for a specific appointment.
2. **Appointments**
The Appointment menu lets you look for an opening in your schedule and book one for your patient.
3. **Schedules**
The **Schedules** menu lets you create or change your personnel availabilities
4. **Settings**
The **Settings** menu lets you to set up the planner structure, manage the access to and communication with the users.
5. **Statistics**
The **Statistics** menu lets you extract appointment booking efficiency information.



3.2 Navigation Bar

6. Display / Hide main menu
7. Switching between applications
8. Easily display different **Locations** (if more than one point of service)
9. Enable / Disable online booking
10. See your **public booking page**
11. Asking for help :
 - **Consult the help menu** (complete User Guide)
 - **Contact Help Desk team by email**
 - See **Terms and Conditions**
 - See our **Privacy policy**
 - **About** the software
12. Display planner in French

NEW!



3.2 Navigation Bar (cont'd)



13. Click on the **User's** icon to access:

A. My profile

- Change your personal information
- Reset your password

B. My role

NEW!

- If you have more than one role, scroll down and select the role for the specific need

Quebec's Health Certification law now requires us to separate the different permissions into different roles. You may have access to different menus of the software.

For example: "**Manager**" is now divided into two roles : **Pilot** and **Manager #1**.

Pilot : Settings and Statistics access

Manager #1 :All Schedules and Appointments access.

See the General Access Guide for more information about these roles.

The screenshot displays the software interface for 'Mon établissement de santé'. The navigation bar at the top includes a home icon, the title 'Mon établissement de santé', a location dropdown 'Tous les lieux', and a user icon with a notification badge '13'. Below the navigation bar, there are sections for 'Rendez-vous', 'Configuration', and 'Statistiques'. A dropdown menu is open, showing 'Mon profil' with a sub-menu containing 'Modifier mon rôle', 'Pilote', and 'Me déconnecter'. The 'Pilote' role is highlighted, and a sub-menu for 'Pilote' is visible, showing 'Gestion #1' and 'Pilote'.

B. My role (cont'd)

NEW!



The new Access Guide displays all roles and access menus.

Please note that major changes apply mostly to the **“Manager”**. Certification requires separating access types into different roles. For example :

Pilot (access to Settings and Statistics)

Manager #1 (access to Schedules and Appointment in manager mode).

New names for roles :

- Manager ⇒ Pilot & Manager #1
- Manage Schedules & Appointments ⇒ Manager #1
- Manage Appointments ⇒ Manager #2
- Manage my Schedules and Appointments ⇒ Manager #3
- View Schedules and Appointments ⇒ Read only #1
- View my Schedules and my Appointments ⇒ Read only #2

*Auditing access : coming soon

Tableau général des permissions par rôle



Menu	Pilote	Gestion #1	Gestion #2	Gestion #3	Consultation #1	Consultation #2	Auditeur
Gestion - Tous les rendez-vous		✔	✔				
Consultation - Tous les rendez-vous					✔		
Gestion - Mes rendez-vous				✔			
Consultation - Mes rendez-vous						✔	
Gestion - Tous les horaires		✔					
Consultation - Tous les horaires					✔		
Gestion - Mes horaires				✔			
Consultation - Mes horaires						✔	
Configuration	✔						
Statistiques	✔						
Journalisation							✔

✔ Consultation

✔ Gestion

4. Logout

4.1 Logout

To exit the software :

1. Click on the **User's** icon
2. Click on **Logout**

In order to reset your password, please go to:

<https://admin3.clicsante.ca/login>

The screenshot displays the user interface of a health establishment management system. At the top, the header shows 'Mon établissement de santé' and 'Tous les lieux'. A user profile icon in the top right corner is highlighted with a red circle labeled '1'. A dropdown menu is open, showing options: 'Mon profil', 'Rôle: Pilote', and 'Me déconnecter'. The 'Me déconnecter' option is highlighted with a red circle labeled '2'. The background shows a calendar view for July 2019 with various data points and charts.

Section B

Appointment Planner



1. Settings
2. Schedules
3. Appointments
4. Follow-up
5. Statistics (coming soon)
6. Daily report (coming soon)

1. Settings

Settings allows you to configure all booking building blocks, manage planner access and contact with users.

To **access** Settings :

NEW!

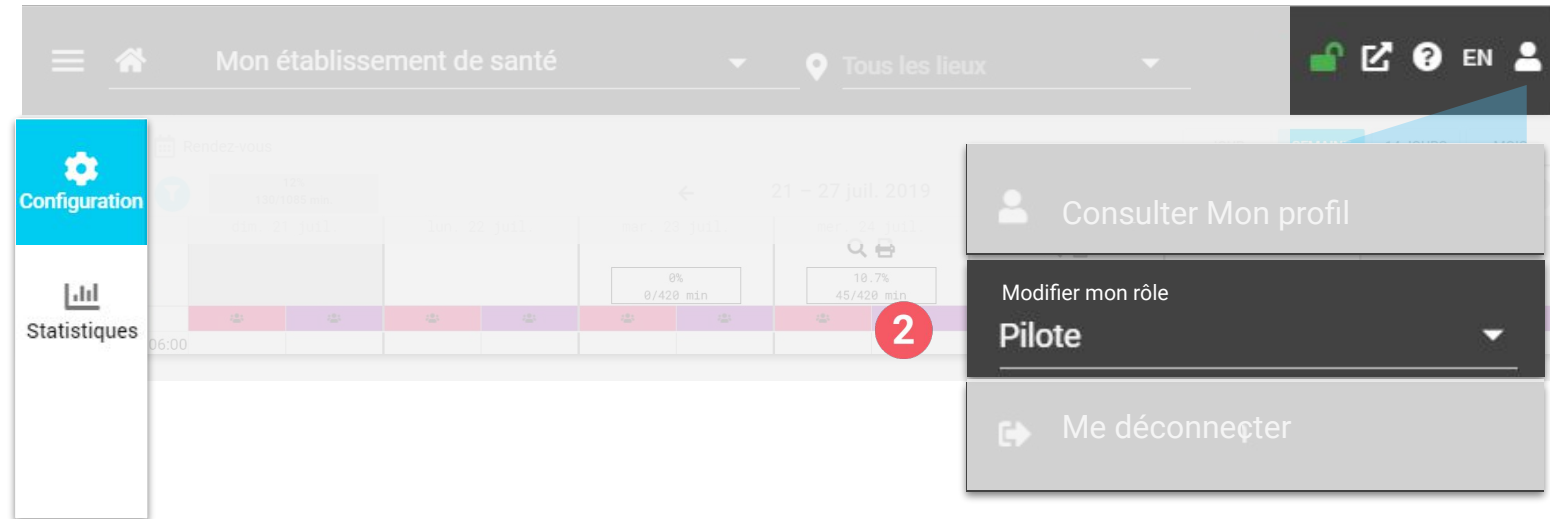
If you have **different roles** :

1. Click on **User's** icon
2. Choose **Pilot** from the list

Reminder: Pilot

This role gives you access to :

- **Settings Menu**
- **Statistics Menu**



The screenshot shows the application interface for 'Mon établissement de santé'. The top navigation bar includes a home icon, the title 'Mon établissement de santé', a location dropdown 'Tous les lieux', and user icons. A red circle '1' highlights the user profile icon in the top right. A left sidebar menu contains 'Configuration' (highlighted in blue) and 'Statistiques'. A right sidebar menu is open, showing options: 'Consulter Mon profil', 'Modifier mon rôle', 'Pilot' (selected), and 'Me déconnecter'. A red circle '2' highlights the 'Pilot' role selection.


1.1 Services

The **Services** page displays the full list of available services.

1. Enable / Disable a service

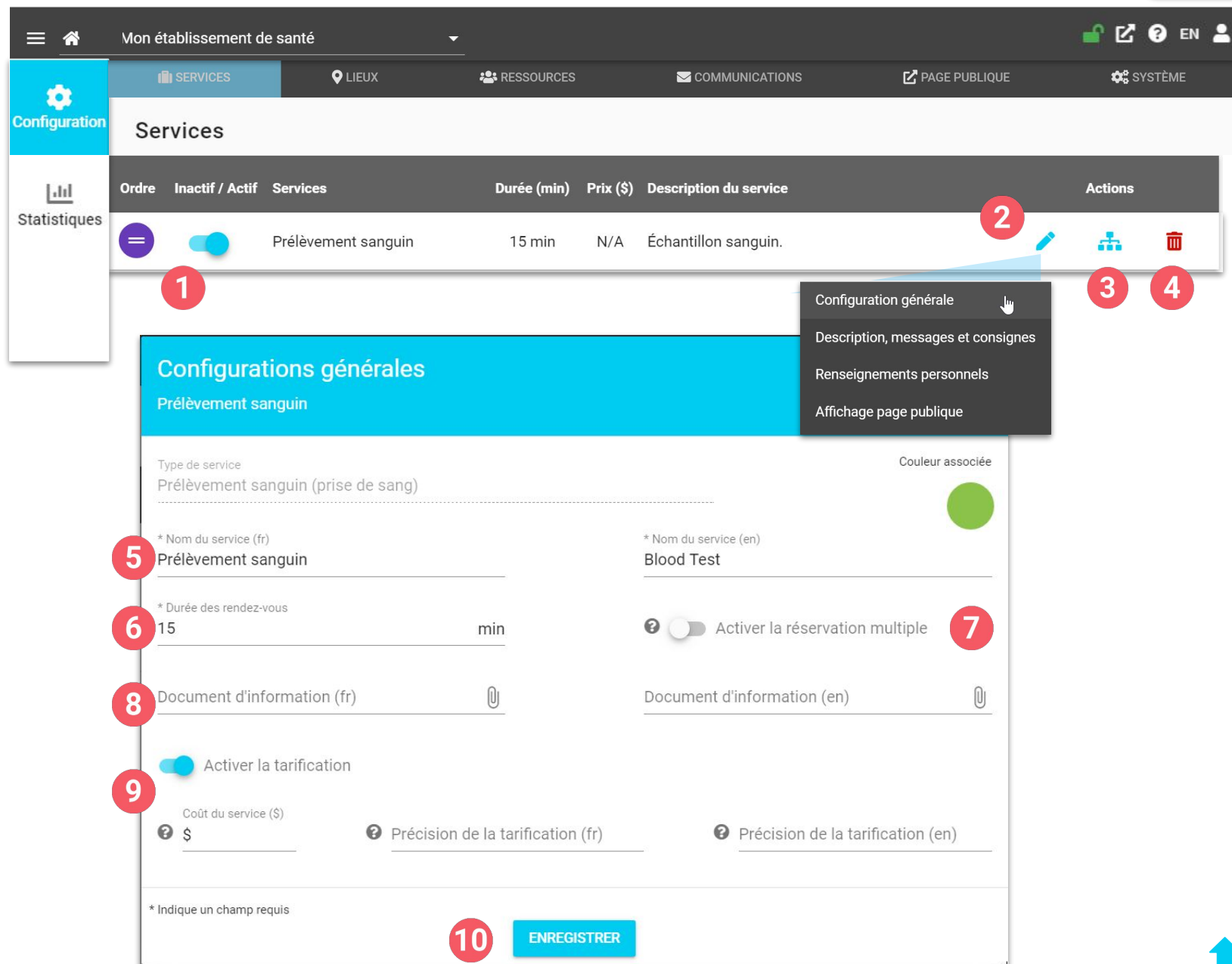
Disabled services do not appear on the reservation page

2. Modify a service
3. Link locations and and resources by service
4. Remove (delete) a service

 To add new services, contact our Support Team at: support@trimoz.comt

General Settings

5. **Service names** (En & Fr) can be modified.
6. Show **Appointment times** for each service. (To determine patient per day capacity).
Enable multiple bookings so patients may book more than one appointment per day.
7. See **Information Document** (En & Fr) for this service. (To be attached to confirmation email in PDF format, maximum of 2 MB)
9. **Enable pricing** if desired
Show cost and details (En & Fr)
10. Click on **Save**






Mon établissement de santé

SERVICES LIEUX RESSOURCES COMMUNICATIONS PAGE PUBLIQUE SYSTÈME

Configuration

Services

Ordre	Inactif / Actif	Services	Durée (min)	Prix (\$)	Description du service	Actions
	<input checked="" type="checkbox"/>	Prélèvement sanguin	15 min	N/A	Échantillon sanguin.	  

1

2

3

4

Configuration générale

Description, messages et consignes

Renseignements personnels

Affichage page publique

Configurations générales

Prélèvement sanguin

Type de service

Prélèvement sanguin (prise de sang)

Couleur associée

* Nom du service (fr)

Prélèvement sanguin

* Nom du service (en)

Blood Test

* Durée des rendez-vous

15 min

7

Activer la réservation multiple

8

Document d'information (fr)

Document d'information (en)

9

Activer la tarification

Coût du service (\$)

Précision de la tarification (fr)

Précision de la tarification (en)

* Indique un champ requis




10

ENREGISTRER

1.1 Services (cont'd)

Descriptions, messages and instructions

1. Choose **descriptions, messages and instructions** by clicking on the **Edit** pencil icon
2. **Description** gives more detail to patients regarding services.
This information will appear on the reservation page when selected. (En & Fr).
3. Add specific patient **instructions** for his/her appointment.
Different instructions per service. This information will appear on the appointment ticket (En & Fr)
4. **Unavailable Message**
This message appears when no appointments are available in the chosen area at the chosen date (En & Fr)
5. **Available Message**
This message appears at the top of the calendar when appointments are available in their area. (En & Fr)
6. Click on **Save**

Ordre	Inactif / Actif	Services	Durée (min)	Prix (\$)	Description du service	Actions
	<input checked="" type="checkbox"/>	Prélèvement sanguin	15 min	N/A	Échantillon sanguin.	  

1

- Configuration générale
- Description, messages et consignes
- Renseignements personnels
- Affichage page publique

2

Description du service

Prélèvement sanguin

Utiliser une description

FRANÇAIS ANGLAIS

Échantillon sanguin.

3

Consigne sur le coupon de rendez-vous

FRANÇAIS ANGLAIS

Veuillez porter un chandail à manche courte.

4

Message sans disponibilité

FRANÇAIS ANGLAIS

Il n'y a plus de disponibilité au lieu choisi. Veuillez sélectionner un autre CLSC à l'étape précédente.

5

Message avec disponibilité

FRANÇAIS ANGLAIS

Si vous n'avez pas de médecin, vous pouvez prendre rendez-vous ici.

6

ENREGISTRER

1.1 Service (cont'd)

Personal information




1. Select **Personal Information** by clicking on the pencil icon to change a service.
2. Activate or deactivate tabs (if required) for the patient questionnaire.


Personal information request

At the bottom, you will have access to a list of all available personal information. If you would like to add another category to this list, please contact our support team.

Trimoz Technologies follows the Personal Information Protection and Electronic Documents Act (PIPEDA). If you have any questions about sensitive information, please contact us at: support@trimoz.com

3. Click on **Save**

Ordre	Inactif / Actif	Services	Durée (min)	Prix (\$)	Description du service	Actions
	<input checked="" type="checkbox"/>	Prélèvement sanguin	15 min	N/A	Échantillon sanguin.	  

- Configuration générale
- Description, messages et consignes
- Renseignements personnels  **1**
- Affichage page publique

Renseignements personnels ✕

Prélèvement sanguin

Prénom	2 <input checked="" type="checkbox"/> Activer	<input checked="" type="checkbox"/> Requis
Nom de famille	<input checked="" type="checkbox"/> Activer	<input checked="" type="checkbox"/> Requis
Courriel	<input checked="" type="checkbox"/> Activer	<input type="checkbox"/> Requis
Cellulaire	<input checked="" type="checkbox"/> Activer	<input type="checkbox"/> Requis

Renseignements personnels disponibles:

- Date de naissance
- Téléphone
- Commentaires
- Nom d'utilisateur Reacts
- Prénom de l'enfant
- Nom de famille de l'enfant
- Date de naissance l'enfant
- Date prévue d'accouchement

! Contactez "Trimoz Technologies" au [1-844-669-2474](tel:1-844-669-2474) pour obtenir les autorisations.

* Indique un champ requis

3



1.1 Service (cont'd)

Public page display properties

4. Choose **Public page display** page after clicking on the pen icon
5. **Option to display or not display appointment duration** on the reservation page
6. Option to activate or not activate the **comments field** when the user books an appointment
7. Time lapse between booking and the actual time of the appointment
8. **Display availabilities over X number** of following days (including today)
9. Click on **Save**

Ordre	Inactif / Actif	Services	Durée (min)	Prix (\$)	Description du service	Actions
	<input checked="" type="checkbox"/>	Prélèvement sanguin	15 min	N/A	Échantillon sanguin.	

- Configuration générale
- Description, messages et consignes
- Renseignements personnels
- Affichage page publique

Propriétés d'affichage sur la page publique

Prélèvement sanguin

5
 Afficher la durée des rendez-vous

6
 Afficher le champ commentaire (utilisateur)

7
 Les rendez-vous ne peuvent être réservés moins de heures à l'avance

8
 Afficher les disponibilités des prochains jours sur la page de réservation publique

9

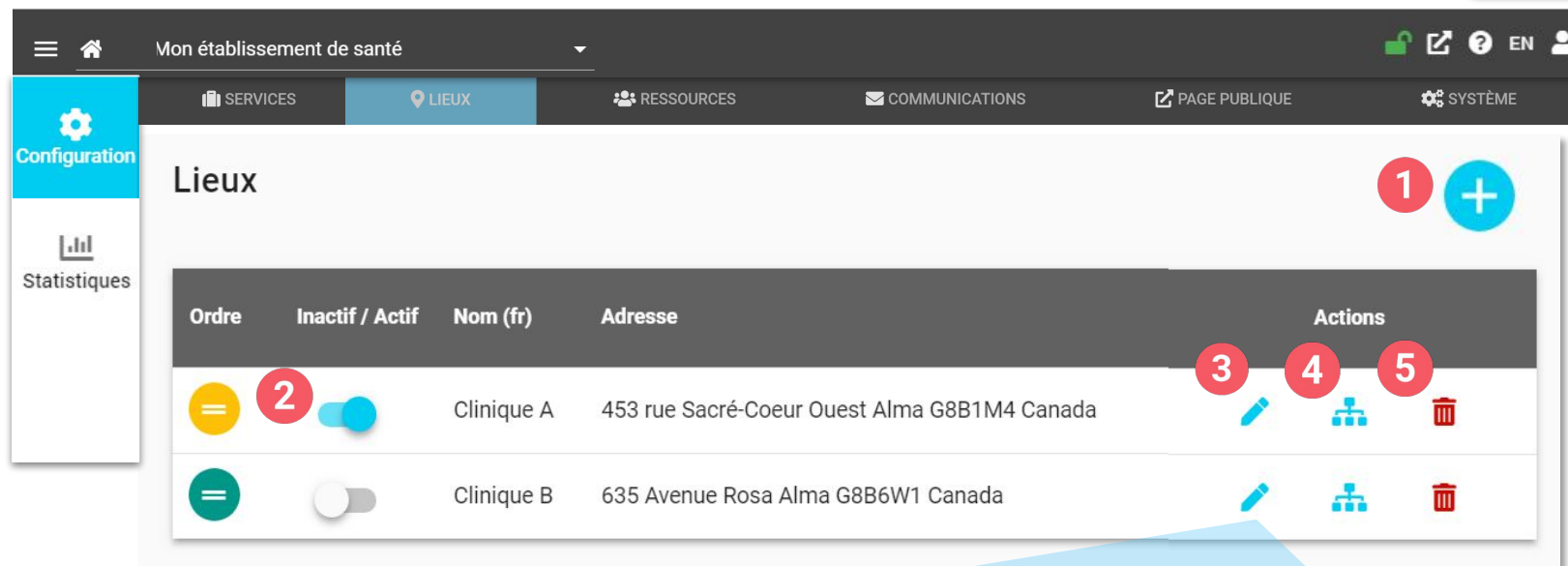
4



1.2 Location

Location indicates available service locations.

1. Add new location
2. Enable/Disable a location
Disabled locations do not appear on your reservation page.
3. Edit a location
4. Link a location
5. Remove a location



Mon établissement de santé

SERVICES LIEUX RESSOURCES COMMUNICATIONS PAGE PUBLIQUE SYSTÈME

Configuration

Statistiques

Lieux

Ordre	Inactif / Actif	Nom (fr)	Adresse	Actions
1	<input checked="" type="checkbox"/>	Clinique A	453 rue Sacré-Coeur Ouest Alma G8B1M4 Canada	2 3 4 5
2	<input type="checkbox"/>	Clinique B	635 Avenue Rosa Alma G8B6W1 Canada	

General Settings

6. Complete required fields :
 - Name (en & fr)
 - Address
 - City
 - Postal Code
 - Country

Modification du lieu

Configurations générales

6

ID

Couleur associée

* Nom (fr)

* Nom (en)

* Adresse

* Ville

* Code Postal

* Pays

1.2 Location (cont'd)

Appointment ticket message specific to this location.

- The **message** includes guidelines for the patient related to the location.

This guideline appears when the patient books an appointment at a specific location and appears on the confirmation ticket.

Postal codes served (optional)

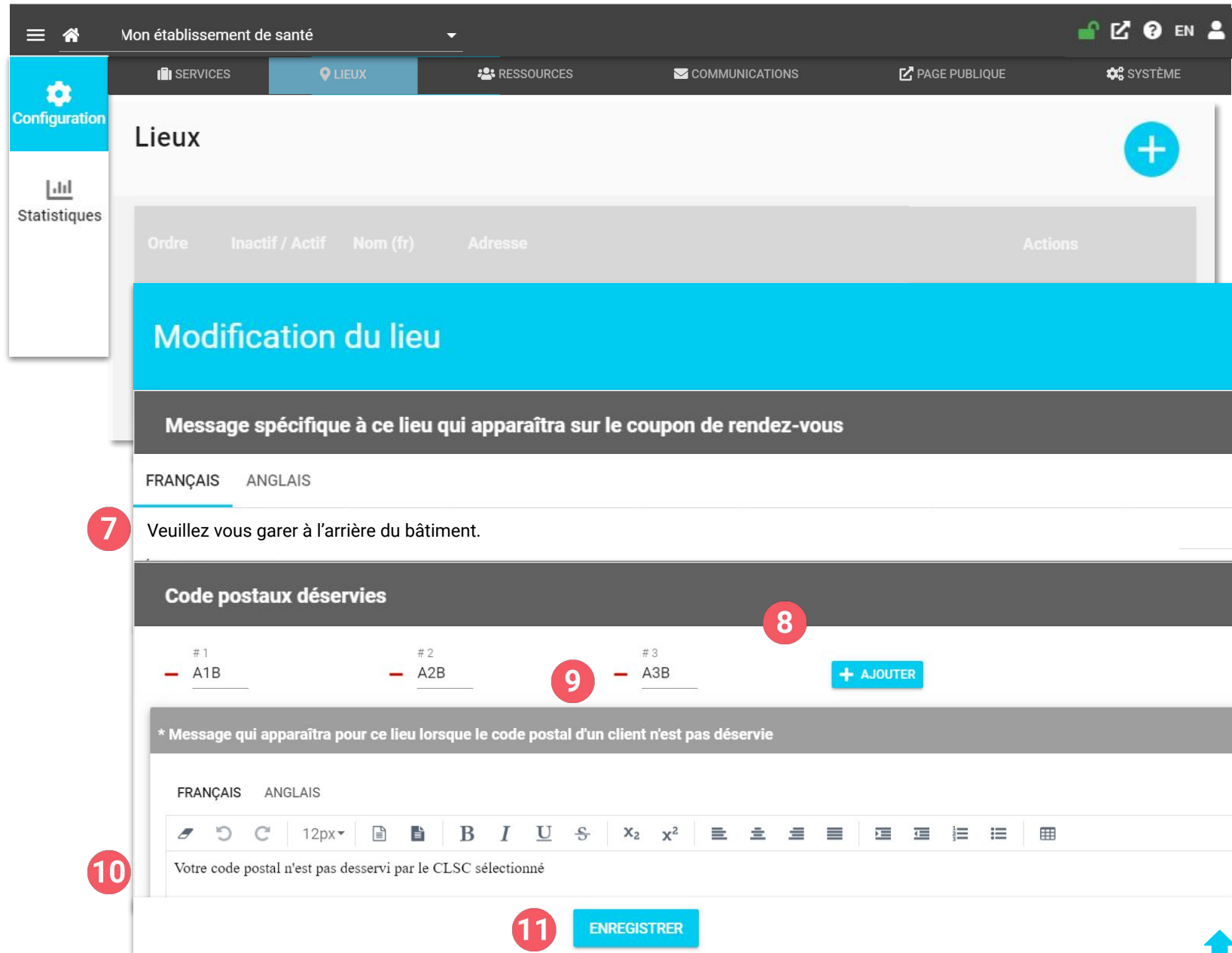
List the postal codes served by your healthcare location (three first letters/numbers)

- Add** a postal code
- Remove** a postal code
- Message** will appear if postal code is not within service area.

If a user enters a postal code outside the service area, the online booking process will be blocked and this message will appear on screen.

Exemple: Service not provided in the designated area

- Click on **Save**



Mon établissement de santé

SERVICES LIEUX RESSOURCES COMMUNICATIONS PAGE PUBLIQUE SYSTÈME

Configuration

Statistiques

Lieux

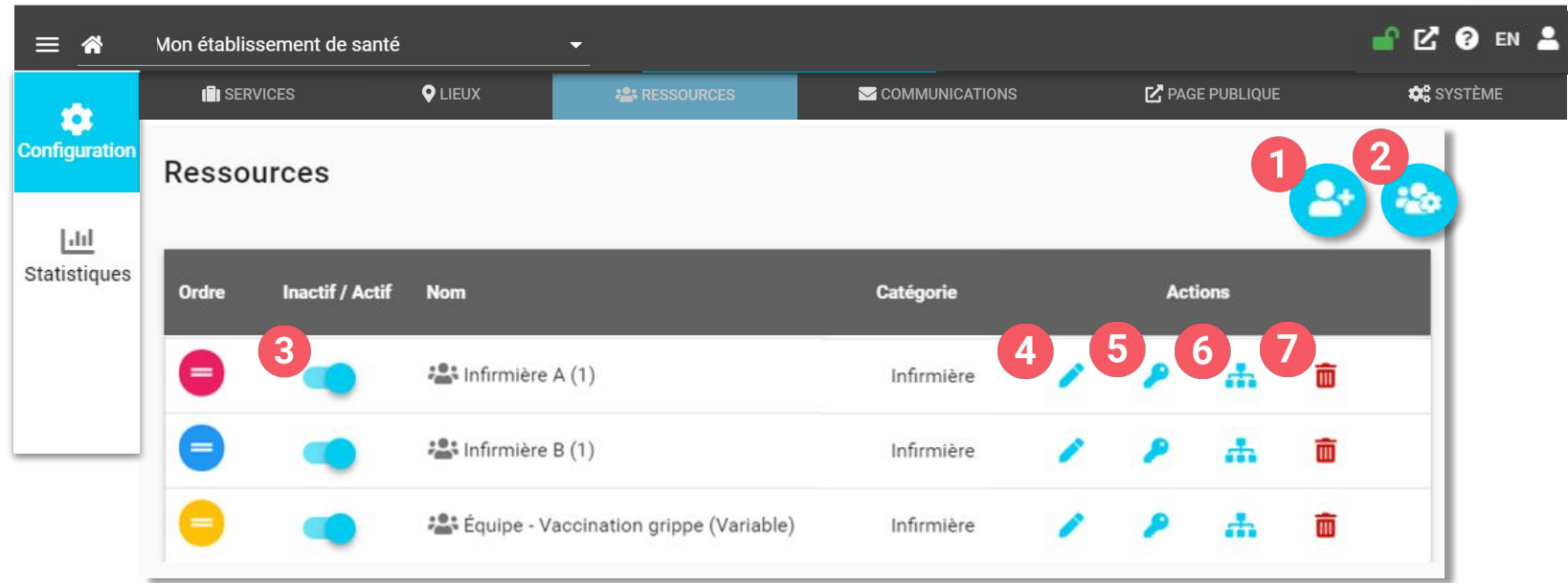
Ordre	Inactif / Actif	Nom (fr)	Adresse	Actions
<h3>Modification du lieu</h3>				
Message spécifique à ce lieu qui apparaîtra sur le coupon de rendez-vous				
FRANÇAIS ANGLAIS				
7 Veuillez vous garer à l'arrière du bâtiment.				
Code postaux déservies				
#1 #2 #3 - A1B - A2B 9 - A3B + AJOUTER 8				
* Message qui apparaîtra pour ce lieu lorsque le code postal d'un client n'est pas desservi				
FRANÇAIS ANGLAIS				
10 Votre code postal n'est pas desservi par le CLSC sélectionné				
11 ENREGISTRER				

1.3 Resources

Resources list the available human resources offering online services or that have access to the planner

Overview
















1. **Add a resource**
Create a resource.
2. **Add a team**
Create one or more anonymous resources that can offer one or more appointments during the same period.
3. **Enable /Disable a resource/team**
4. **Modify a resource/team and reset password**
5. **Change roles and permissions**
6. **Link services to locations** for your HR
(For showing online availabilities)
7. **Remove a resource/team from the system**



Mon établissement de santé

SERVICES LIEUX RESSOURCES COMMUNICATIONS PAGE PUBLIQUE SYSTÈME

Ressources

Ordre	Inactif / Actif	Nom	Catégorie	Actions
	<input checked="" type="checkbox"/>	Infirmière A (1)	Infirmière	   
	<input checked="" type="checkbox"/>	Infirmière B (1)	Infirmière	   
	<input checked="" type="checkbox"/>	Équipe - Vaccination grippe (Variable)	Infirmière	   



1.3 Resources (cont'd)

Add a team

Create one or more anonymous resources that can offer one or more appointments during the same time frame.

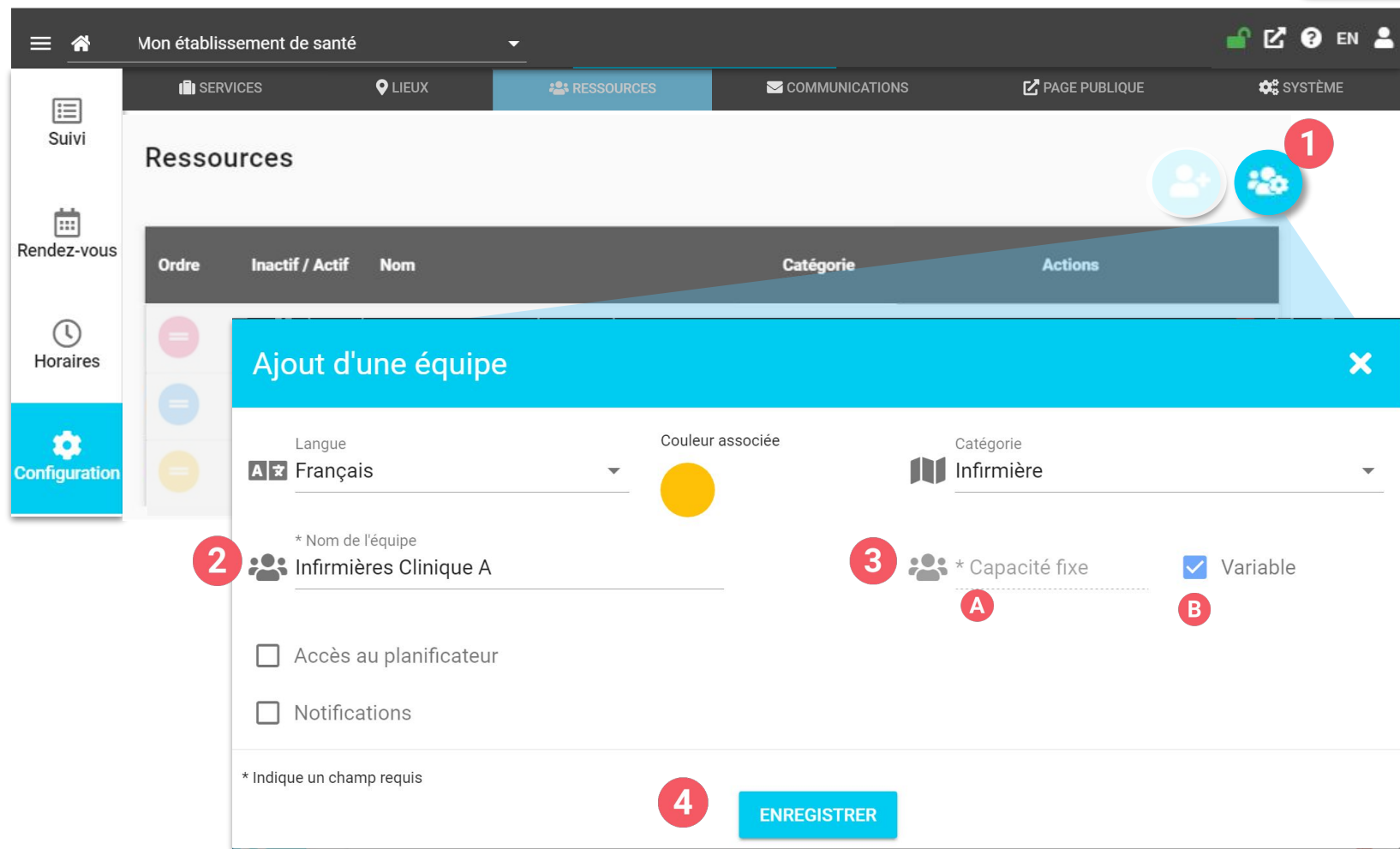
1. Click the **Team** icon
The page **Add a Team** will pop up
2. Indicate the **team name**
3. Determine **capacity** (see further for details)
 - A. Fixed capacity
 - B. Variable capacity
4. Click on **Save**

Choose **Pre-set** or **Variable** capacity

A. Pre-set capacity - Number of appointments in the same time frame is pre-set and does not change.
Ex : There are always two appointments available at the same time in the day, everyday.

B. Variable capacity - Number of appointments may vary from one day to another.

★ Benefits : More flexibility in planning schedules.
Ex : Nurses vaccinate more patients at the beginning of each time frame in order to manage potential tardiness.
Ex : Clinic A permits seeing two patients at the same time in the morning and three in the afternoon.



Mon établissement de santé

SERVICES LIEUX RESSOURCES COMMUNICATIONS PAGE PUBLIQUE SYSTÈME

Suivi
Rendez-vous
Horaires
Configuration

Ressources

Ordre	Inactif / Actif	Nom	Catégorie	Actions
-------	-----------------	-----	-----------	---------

Ajout d'une équipe

Langue: Français (A) Couleur associée: ● Catégorie: Infirmière

* Nom de l'équipe: Infirmières Clinique A (2)

* Capacité fixe (A) Variable (B)

Accès au planificateur
 Notifications

* Indique un champ requis (4)

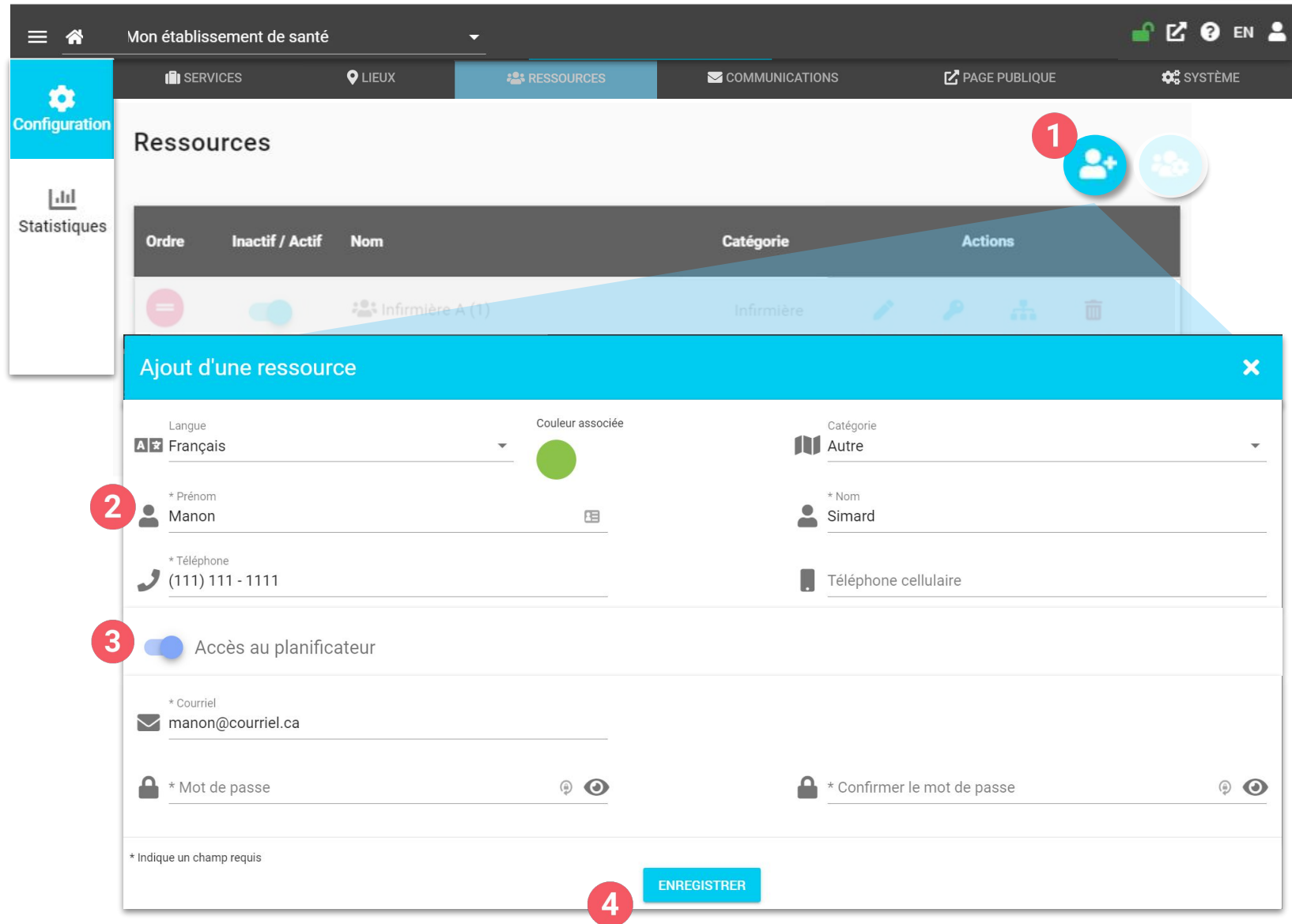
ENREGISTRER

1.3 Resources (cont'd)

Add a resource (Access account)

Add another resource with access to the software.

1. Click on the **Resource** icon.
Add a resource will pop up.
2. Complete the fields of the human resources profile.
3. To allow resource Access to planner, you need to activate the radio button.
 - Include the HR's email address (necessary so that the HR can log in)
 - Include password and confirm
4. Click on **Save**.



The screenshot displays the 'Ressources' management interface. The top navigation bar includes 'Mon établissement de santé', 'SERVICES', 'LIEUX', 'RESSOURCES', 'COMMUNICATIONS', 'PAGE PUBLIQUE', and 'SYSTÈME'. A sidebar on the left contains 'Configuration' and 'Statistiques'. The main content area shows a table of resources with columns for 'Ordre', 'Inactif / Actif', 'Nom', 'Catégorie', and 'Actions'. A modal window titled 'Ajout d'une ressource' is open, containing the following fields:

- Langue:** Français (dropdown)
- Couleur associée:** Green circle
- Catégorie:** Autre (dropdown)
- * Prénom:** Manon
- * Nom:** Simard
- * Téléphone:** (111) 111 - 1111
- Téléphone cellulaire:** (empty)
- Accès au planificateur:** Radio button (checked)
- * Courriel:** manon@courriel.ca
- * Mot de passe:** (password field)
- * Confirmer le mot de passe:** (password field)

At the bottom of the form is an 'ENREGISTRER' button. Red callout numbers 1-4 indicate the steps: 1 points to the 'Ajout d'une ressource' modal, 2 points to the 'Prénom' field, 3 points to the 'Accès au planificateur' radio button, and 4 points to the 'ENREGISTRER' button.

1.3 Resources (cont'd)



Managing roles and permissions NEW!

Quebec's Health and Certification guidelines require separating the permission types in specific roles.

Ex: HR personnel can have one or more roles.

1. The **General Access Guide** provides an overview of available roles*. Menus are available for each role.

The main changes are related to the previously named "Administrator" role.

This is now divided into two roles :

- **Pilot** (access Settings and Statistics)
- **Manager #1** (access to the Schedule and Appointments menu)

*Auditing/Audit log : coming soon

1

Tableau général des permissions par rôle

Menu	Pilote	Gestion #1	Gestion #2	Gestion #3	Consultation #1	Consultation #2	Auditeur
Gestion - Tous les rendez-vous		✓	✓				
Consultation - Tous les rendez-vous					✓		
Gestion - Mes rendez-vous				✓			
Consultation - Mes rendez-vous						✓	
Gestion - Tous les horaires		✓					
Consultation - Tous les horaires					✓		
Gestion - Mes horaires				✓			
Consultation - Mes horaires						✓	
Configuration	✓						
Statistiques	✓						
Journalisation							✓

✓ Consultation
✓ Gestion

Managing roles and permissions (cont'd)



After adding a **resource**, designate the proper role(s) for this resource.

NEW!

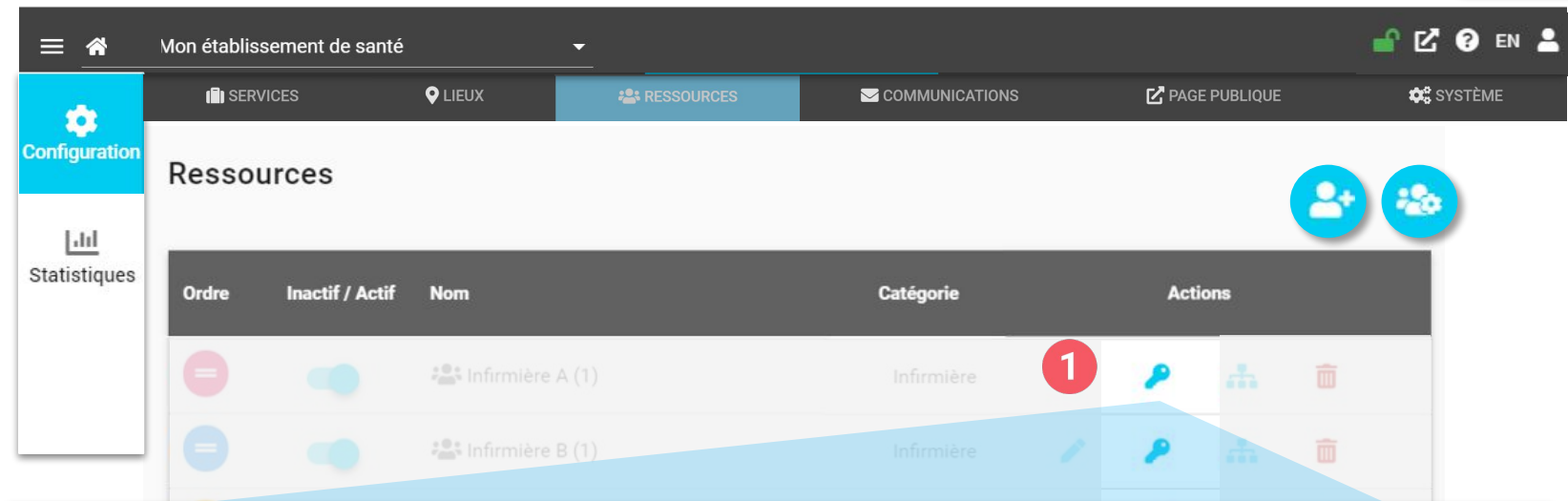
1. Click on the **key** icon (Edit a role)

As a Pilot, you will see the **General Role Table** document. This lists the various permissions your resource has access to, and for which you manage.

*The **Read-Only #2** role is the default setting. This is the most restrictive setting.*

Please see the following sections to:

- [Change an HR's role](#)
- [Add a role / Increasing access to other sectors.](#)




Rôle	Secteur	Lieu	Actions
Consultation #2	Mon établissement de santé	Tous les lieux	 
Gestion #2	Vaccination enfants - Démo	Tous les lieux	 

Managing roles and permissions (cont'd)



Change the role of an HR



NEW!

1. Click on the **pen** icon beside the section you want to edit.
The **Edit role** page will appear.
2. Choose the new role.
Once edited, the role description and associated permissions will appear in the upper left side of the page.
3. Click on **Save**.

Confirm changes by clicking again on **Save**.

Quebec's Health Certification requirements do not allow **Pilots** to create another **Pilot** profile.

In order to add another team member as a **pilot**, please contact us at support@trimoz.com with the following information :

- First name, last name and email address of new pilot.
- Section to which they should have access

Liste des permissions de Marie Simard

CONSULTER LE TABLEAU GÉNÉRAL DES RÔLES

A.JOUTER UN RÔLE

CIUSSS Demo

Rôle	Secteur	Lieu	Actions
Consultation #2	Mon établissement de santé	Tous les lieux	
Gestion #2	Vaccination enfants - Démo	Tous les lieux	

Modifier un rôle

Choisir le rôle
Consultation #2

Choisir le secteur
Mon établissement

Choisir le lieu
Tous les lieux

Permissions associées au rôles

Consultation #2

- Gestion #1
- Gestion #2
- Gestion #3

Permissions associées au rôles	Consultation #2
Gestion - Mes rendez-vous	
Consultation - Mes rendez-vous	<input checked="" type="checkbox"/>
Gestion - Tous les horaires	
Consultation - Tous les horaires	
Gestion - Mes horaires	
Consultation - Mes horaires	<input checked="" type="checkbox"/>
Configuration	

ANNULER ENREGISTRER

Managing roles and permissions (cont'd)



NEW!

Add a role/Link an account to more than one section (application)

You can now link the account of one of your team members to another sector (application) which you manage as a 'Pilot'.

1. Click on the icon 'Add a role'
Screen will pop up and **Add a role** will appear
2. Choose which one you want to add
The description of the role and associated permissions will appear to the right of your screen.
3. **Choose section** (application) to access.
4. The default is **full access** (Select access accordingly)
5. Click on **Save**.

The new role will appear on the permissions list of your resource. Click on **Save** to confirm changes.



Liste des permissions de Marie Simard

CONSULTER LE TABLEAU GÉNÉRAL DES RÔLES

1 AJOUTER UN RÔLE
pour ce secteur ou un autre secteur

CIUS

2 Choisir le rôle
Gestion #2

3 Choisir le secteur
Gestion #2

4 Choisir le lieu
Tous les lieux

5 ANNULER ENREGISTRER

Permissions associées au rôles

	Gestion #2
la gestion des rendez-vous.	
s les rendez-vous	<input checked="" type="checkbox"/>
Tous les rendez-vous	
Gestion - Mes rendez-vous	
Consultation - Mes rendez-vous	
Gestion - Tous les horaires	



1.3 Resources (cont'd)



Display availabilities online: link resources, locations and services

To create your availabilities online, you must link the three different components : Resources, Services and Locations. When the time slots are created, the links will be permanent.

If the HR is not a direct health provider and doesn't offer services online, no link is necessary. Ex : Program manager, administrative agents, nurses who only need to see schedules and appointments.

After adding a service, a place or a resource, please update the links, indicating which services are provided by the HR and at which location.

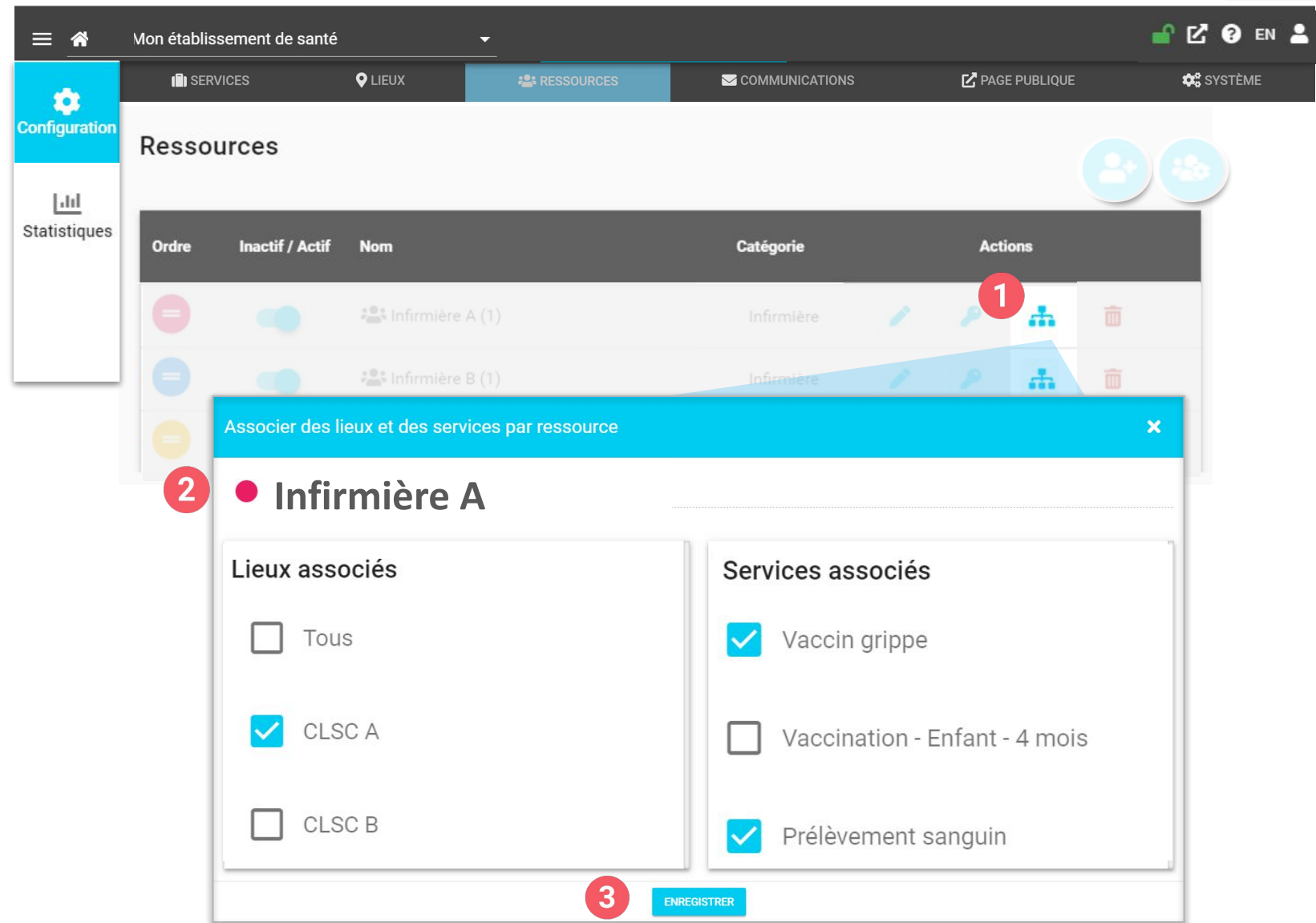
1. Click on the **link icon**
2. **Link Services and locations by resource**

Example :

Nurse A only works at Pharmacy A and only offers these services:

- Blood tests
- Flu Shots

3. Click to **Save**.



The screenshot shows the 'Ressources' management interface. At the top, there is a navigation bar with 'Mon établissement de santé' and various menu items: SERVICES, LIEUX, RESSOURCES (selected), COMMUNICATIONS, PAGE PUBLIQUE, and SYSTÈME. A sidebar on the left contains 'Configuration' and 'Statistiques'. The main area displays a table of resources with columns: Ordre, Inactif / Actif, Nom, Catégorie, and Actions. Two resources are listed: 'Infirmière A (1)' and 'Infirmière B (1)', both categorized as 'Infirmière'. A red circle '1' highlights the link icon in the Actions column for 'Infirmière A'. A modal window titled 'Associer des lieux et des services par ressource' is open for 'Infirmière A'. It has two sections: 'Lieux associés' with checkboxes for 'Tous', 'CLSC A' (checked), and 'CLSC B'; and 'Services associés' with checkboxes for 'Vaccin grippe' (checked), 'Vaccination - Enfant - 4 mois', and 'Prélèvement sanguin' (checked). A red circle '2' highlights the resource name 'Infirmière A', and a red circle '3' highlights the 'ENREGISTRER' button at the bottom of the modal.

Ordre	Inactif / Actif	Nom	Catégorie	Actions
	<input checked="" type="checkbox"/>	Infirmière A (1)	Infirmière	[Link icon] [Edit] [Delete]
	<input checked="" type="checkbox"/>	Infirmière B (1)	Infirmière	[Link icon] [Edit] [Delete]

Associer des lieux et des services par ressource

Infirmière A

Lieux associés

Tous

CLSC A

CLSC B

Services associés

Vaccin grippe

Vaccination - Enfant - 4 mois

Prélèvement sanguin

3 ENREGISTRER

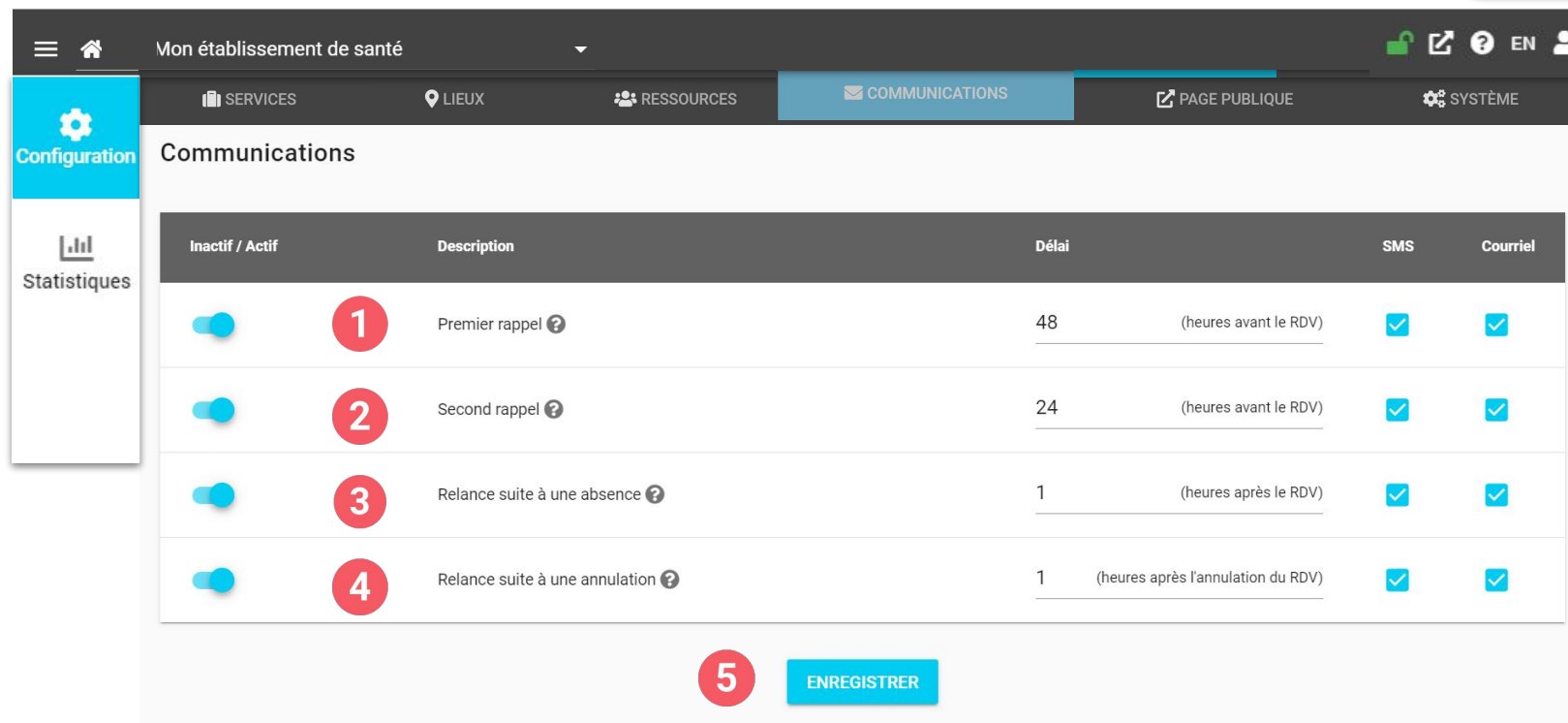
1.4 Automated communication

The **Communications section** allows users to send automated messages to the patients.

Choose communication types and time frame:

1. **First reminder** - Automatic appointment confirmation reminder.
2. **Second reminder** - A second automatic reminder for the patients who did not confirm their appointment(s) following the first reminder.
3. **Follow up after an absence** - When an appointment status is changed to Absent, a follow up message will prompt the patient to make another appointment.
4. **Follow up after a cancellation** - If an appointment is cancelled either by the patient or by the service provider, a message will prompt the patient to make another appointment.
5. Click on **Save**.

*Please note: if a 12hr time frame is chosen, the patient who made an appointment at 3 PM will receive a message a 3 AM.

Mon établissement de santé

SERVICES LIEUX RESSOURCES COMMUNICATIONS PAGE PUBLIQUE SYSTÈME

Configuration

Statistiques

Communications

Inactif / Actif	Description	Délai	SMS	Courriel
<input checked="" type="checkbox"/>	1 Premier rappel ?	48 (heures avant le RDV)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	2 Second rappel ?	24 (heures avant le RDV)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	3 Relance suite à une absence ?	1 (heures après le RDV)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	4 Relance suite à une annulation ?	1 (heures après l'annulation du RDV)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

5 ENREGISTRER



1.5 Public page

This section allows you to set up the reservation page.





Contact information

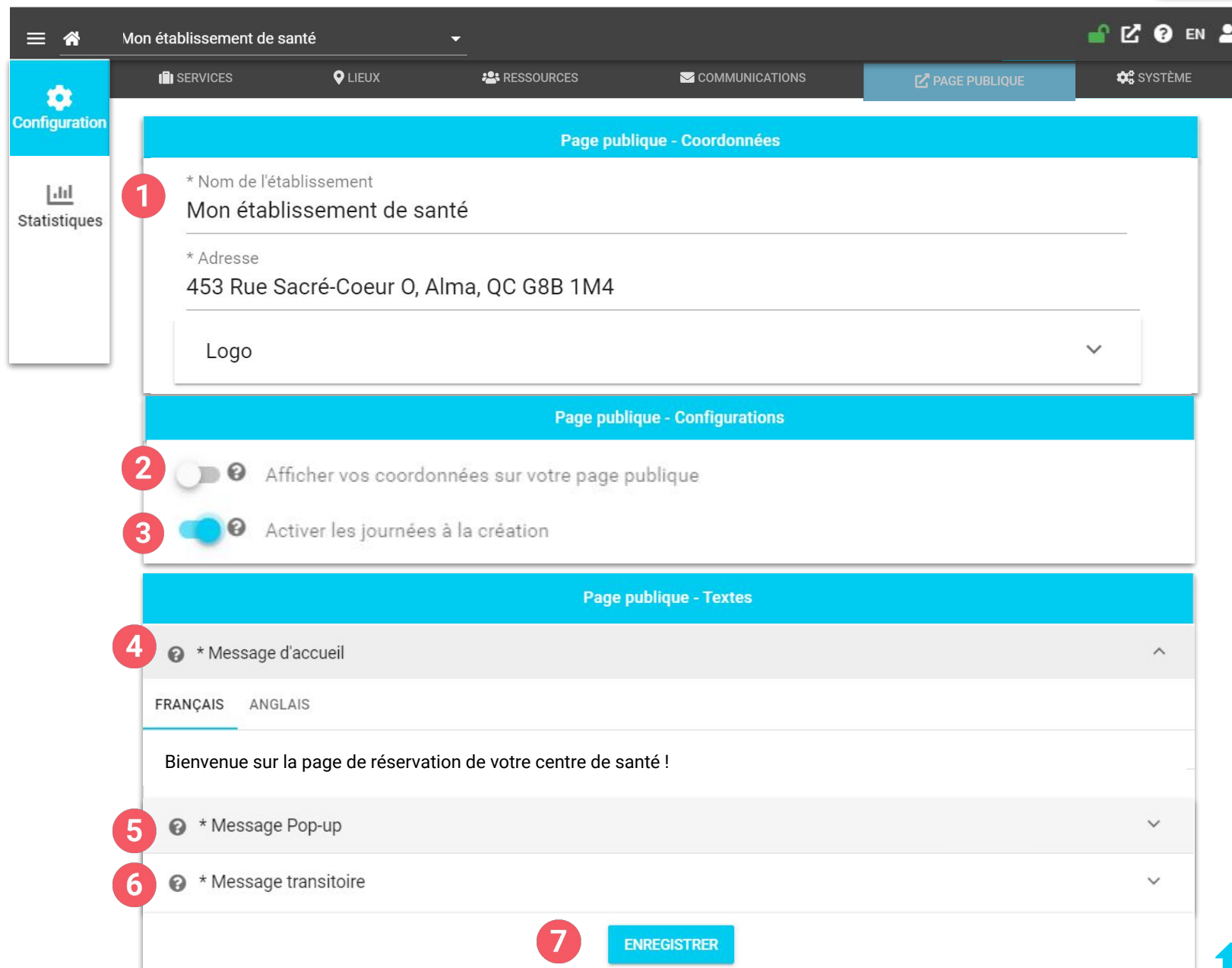
1. Name and detail of your planner can be modified and a logo can be added.

Settings

2. You can choose to show or not to **show your contact information on the public page**.
3. **Make new schedule days available** (green padlock) or not available (red padlock by default). This function allows flexibility in scheduling based on cancellations etc.

Texts

4. **Welcome message** (appointment booking **enabled**)
Welcome message displays on the public page. 
5. **Pop Up message** (appointment booking **enabled**) 
A pop up message with key points/information before the user can book the appointment.
6. **Transitional message** (appointment booking **disabled**) 
Indicates the procedure to follow when the online appointment is not available.
7. Click on **Save**. 



Mon établissement de santé

SERVICES LIEUX RESSOURCES COMMUNICATIONS PAGE PUBLIQUE SYSTÈME

Configuration

Statistiques

Page publique - Coordonnées

- 1 * Nom de l'établissement
Mon établissement de santé
- * Adresse
453 Rue Sacré-Coeur O, Alma, QC G8B 1M4
- Logo

Page publique - Configurations

- 2 Afficher vos coordonnées sur votre page publique
- 3 Activer les journées à la création

Page publique - Textes

- 4 * Message d'accueil
FRANÇAIS ANGLAIS
Bienvenue sur la page de réservation de votre centre de santé !
- 5 * Message Pop-up
- 6 * Message transitoire

7 ENREGISTRER

1.6 System

The System page permits security options and modifications.

NEW!

Account security

1. **Optional deactivation** account access for accounts with no activity.
2. **Optional deactivation account access related to failed connections.**

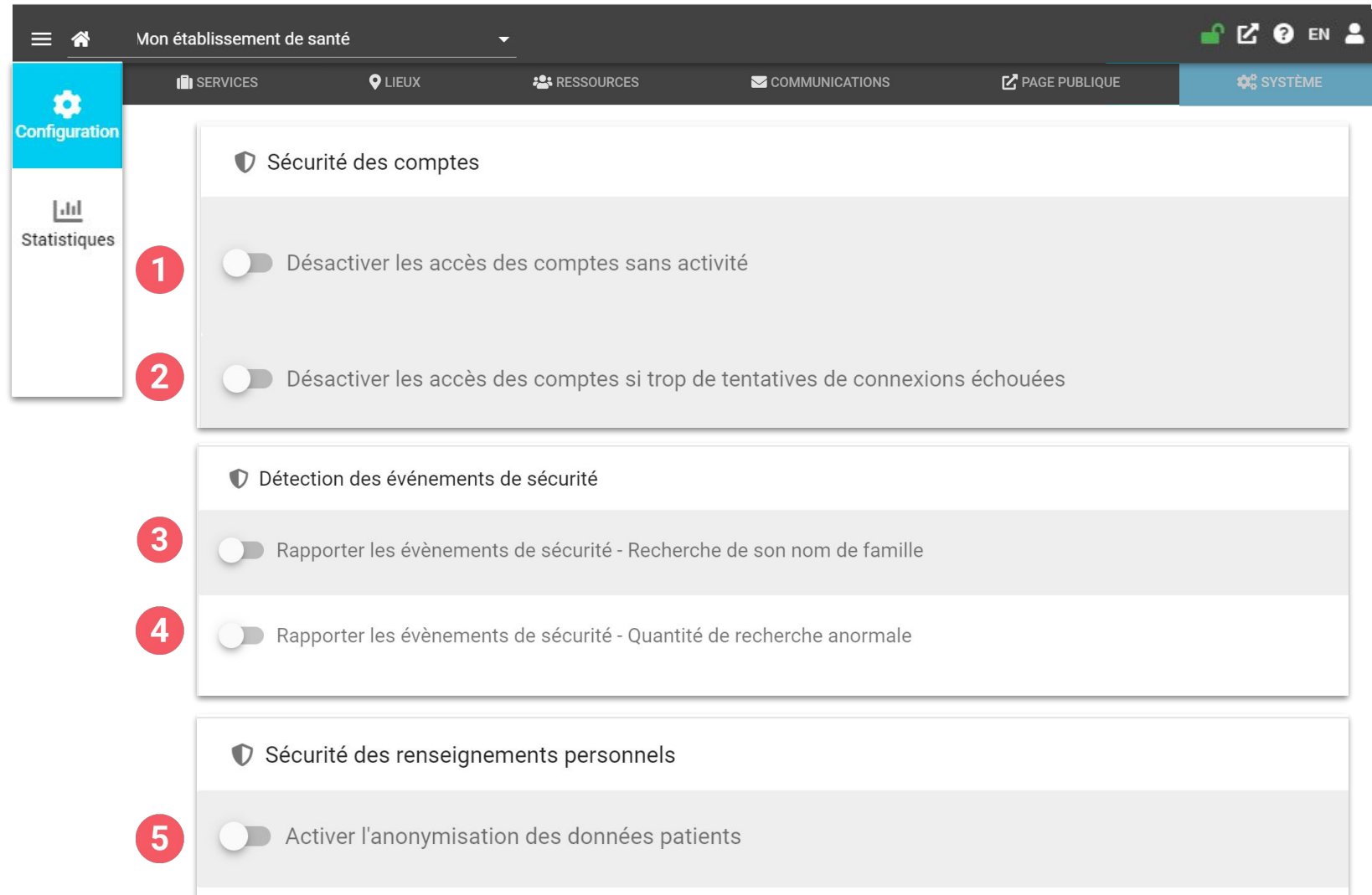
If account security is activated, the pilot contact information will be emailed to the user whose account is deactivated. Deactivated accounts have a red padlock in the resource page.

Reporting Security Events

3. **Reporting Security Events - Name search**
If enabled: an email is sent to the pilot(s) if the system detects more than three searches in the last hour (if the family name is the same than the user who did the search).
4. **Reporting Security Events - Too many searches**
If enabled: an email is sent to the pilot(s) if the system detects that in the last five minutes the total of searches is 2.5X more than the average searches in the last three hours.

Security of sensitive information

5. To keep specific personal information private/not public, please contact us at: support@trimoz.com.



The screenshot shows the 'Mon établissement de santé' configuration page. The left sidebar contains 'Configuration' and 'Statistiques'. The main content area is titled 'Sécurité des comptes' and 'Sécurité des renseignements personnels'. Five red circles with numbers 1 through 5 are overlaid on the page to indicate specific settings.

- 1. Désactiver les accès des comptes sans activité
- 2. Désactiver les accès des comptes si trop de tentatives de connexions échouées
- 3. Rapporter les évènements de sécurité - Recherche de son nom de famille
- 4. Rapporter les évènements de sécurité - Quantité de recherche anormale
- 5. Activer l'anonymisation des données patients



1.7 Advanced Settings

Patient Screening Questions (Optional)

Settings > Services section

Patient screening questions: ask specific questions to direct individuals to the appropriate healthcare provider and create custom messages.

1. Select Filters / Questions

- Questions that can be answered with 'Yes or No', will help you to lead your patient to the appropriate healthcare provider.

Examples :

- Are you 24 years old or younger ?
- Do you have any symptoms ?

- Indicate the field of specialization of the healthcare providers treating "yes" clients and repeat for "no" clients.

Examples :

- Are you 24 years old or younger ?
'Yes' - Less than 24 years old / 'No' - More than 24
- Do you have any symptoms ?
'Yes' - Symptomatic / 'No' - Asymptomatic

- You can add a maximum of three questions.

Ordre	Inactif / Actif	Services	Durée (min)	Prix (\$)	Description du service	Actions
	<input checked="" type="checkbox"/>	Prélèvement sanguin	15 min	N/A	Échantillon sanguin.	  

Filtres / Questions

1

Filtres de clientèle - Questions

* FRANCAIS * ENGLISH

Question 1 (fr) 2

 Avez-vous 24 ans et moins ? 3

Clientèle "Oui" 3 Moins 24 ans

Clientèle "Non" Plus 24 ans

Question 2 (fr)

 Avez-vous des symptômes ?

Clientèle "Oui" Symptomatique

Clientèle "Non" Asymptomatique

4 [AJOUTER UNE QUESTION](#)



Patient Screening Questions (Optional) (cont'd)

Create customized messages based on filtered responses.

5. Select message type :
 - **Availabilities** : This message appears when there are available appointments.
 - **No Availabilities** : This message appears when there are no available appointments or if the services are not provided in the designated area.
6. Select the available/potential answers to the questions.
7. Type the customized message in English and French.
8. Click on **Save**.

Filtres / Questions

Filtres de clientèle - Messages

5 * Type de message

6 Moins 24 ans Plus 24 ans

Symptomatique Asymptomatique

5 Avec disponibilités

Sans disponibilités

* Type de message
Avec disponibilités

Moins 24 ans Plus 24 ans

Symptomatique Asymptomatique

7

FRANÇAIS ANGLAIS

12px

Sélectionnez une date et une heure pour prendre rendez-vous.
Si le rendez-vous proposé est **au-delà de 3 jours**, appelez au CLSC de votre secteur.

* Type de message
Sans disponibilités

Moins 24 ans Plus 24 ans

Symptomatique Asymptomatique

7

FRANÇAIS ANGLAIS

12px

Il n'y a de rendez-vous disponibles en ligne présentement. Présentez-vous au CLSC durant les heures de sans-rendez-vous, ou appelez le CLSC près de chez vous pour prendre rendez-vous.

8

ENREGISTRER

Patient Screening Questions (Optional) (cont'd)



When creating questions for patient screening, fields linked to the customers who answered ‘Yes’ and those who answered ‘No’, will automatically appear in Linking Services and Location by Resource page.

- Link working places, services and field of specialisation to each resource. These links will be saved when you will create your schedule.

Example :

Nurse A works at **Clinic A** and offers **STBBI Screening**, but only attends to patients who are younger **than 24 years old** and are **Asymptomatic**.

- Click on **Save**.

Filtres / Questions

SERVICES

* FRANCAIS * ENGLISH

Question 1 (fr) ? Avez-vous 24 ans et moins ?

Clientèle "Oui" ? Moins 24 ans
Clientèle "Non" ? Plus 24 ans

Question 2 (fr) ? Avez-vous des symptômes ?

Clientèle "Oui" ? Symptomatique
Clientèle "Non" ? Asymptomatique

Associer des lieux et des services par ressource

RESSOURCES

9

9

● Infirmière A

Lieux associés

Tous

CLSC A

CLSC B

Services associés

Dépistage pour les ITSS

Moins 24 ans Plus 24 ans

Symptomatique Asymptomatique

10

ENREGISTRER

1.7 Advanced Settings (cont'd)

Managing target treatment dates and processing times

Settings > Services section

Processing target treatment dates allows you to manage the recommended time frame/period for obtaining a service or treatment.

1. Select specific properties

2. Establish a target date

Childhood vaccination : target date is based on the birth date of the child, to which we add a set number of days. Availabilities for the **targeted date will appear in green** in the schedule.

A. Period prior to target date is the number of days before birthdate of the child during which the vaccine can be administered.

Ex : Day 0 : No open slots preceding the child's date of birth will be displayed.

Ex : Day 5 : Open slots during the five days preceding the child's date of birth will be displayed.

B. Period post target date is the number of days after the birthdate of the child during which the vaccine can be administered.

Ex : Day 0 : No open slots following the child's date of birth will be displayed.

Ex : Day 10 : open slots during the ten days following the child's date of birth will be displayed.

Ordre	Inactif / Actif	Services	Durée (min)	Prix (\$)	Description du service	Actions
	<input checked="" type="checkbox"/>	Vaccin - 6 mois	15 min		N/A	

Propriétés spécifiques 1

2

? Période cible

Délai avant la cible

A

? 0 jours

Délai après la cible

B

? 10 jours

? Période hors cible

Délai avant la période cible

? 0

Délai après la période cible

? 0

Mars 2019

dim.	lun.	mar.	mer.	jeu.	ven.	sam.
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Période cible
Période hors cible



Customer filters and treatment target dates (cont'd)

3. Establish **non-target period**

For infant vaccination, the non-target period is determined by the number of non-target days added before and/or after the target period.

Non-target period availabilities **will appear in blue** in the schedule of the reservation page.

- A. Pre-target period is the set number of days permissible prior to the target period during which an appointment can be booked.




Ex : Day 0 : No non-target time slot will be displayed.

Ex : Day 5 : Available time slots during the five days preceding the targeted period will be displayed.

- B. Post-target period is the set number of days permissible after the target period during which an appointment can be booked..

Ex : Day 0 : No non-target time slot will be displayed.

Ex : Day 7 : Available time slots during the seven days after the targeted period will be displayed.

Ordre	Inactif / Actif	Services	Durée (min)	Prix (\$)	Description du service	Actions
	<input checked="" type="checkbox"/>	Vaccin - 6 mois	15 min	N/A		  

Propriétés spécifiques

1

? Période cible

Délai avant la cible

? 0 jours

Délai après la cible

? 10 jours

3 ? Période hors cible

Délai avant la période cible

C ? 0 jours

Délai après la période cible

D ? 0 jours

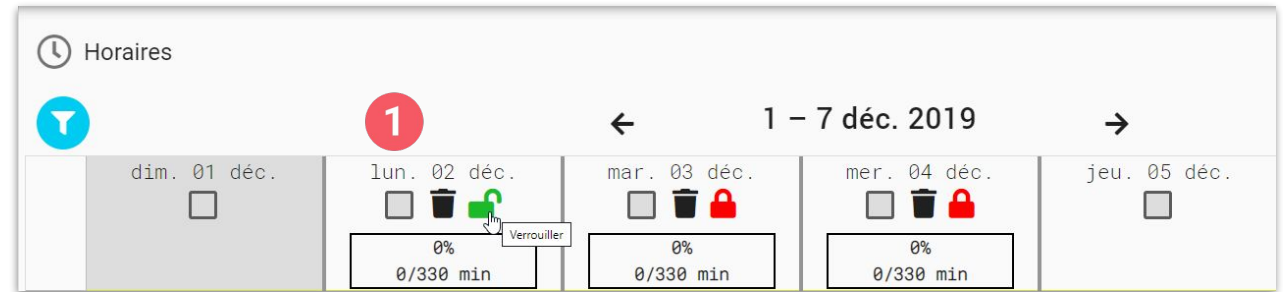
Mars 2019						
dim.	lan.	mar.	mer.	jeu.	ven.	sam.
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Période cible Période hors cible

1.8 Online booking activation

Only **Pilots** can lock or unlock the schedule.

1. Unlock at least one time slot in your schedule. (Change your role to Manager #1 in order to access the Schedules menu)
2. In the navigation bar, click on the **red padlock**
3. A confirmation window will appear. Click **Yes** to activate your public page.
4. The open padlock will appear in green. Online booking is now enabled.
5. To look at your public page, click on the square icon with an arrow.



Visiter la page de réservation publique



Ensure that you have successfully completed the configuration of the settings of your three components and that you have linked HR (personnel) before creating your schedules.

2. Schedules

The Schedules menu lets you create/change the HR (personnel) availabilities in the schedule.

Go to **Schedules** Menu:

NEW!

1. Click on the **user icon**
2. In the scroll down, select one of the roles that you were given:
 - Manager #1
 - Manager #3
 - Read-only #1
 - Read-only #2

Reminder - Role descriptions :

- **Manager # 1** - This role allows access to schedules and appointments.
- **Manager # 3** - This role allows access to **my** schedules and **my** appointments.
- **View-only #1** - This role lets you consult the schedules and appointments.
- **View-only #2** - This role lets you consult **my** schedules and **my** appointments.

The screenshot displays the mobile application interface for a health establishment. At the top, the header reads "Mon établissement de santé" and "Tous les lieux". A navigation menu on the left side includes "Suivi", "Rendez-vous", and "Horaires". A user profile dropdown menu is open, showing "Mon profil", "Modifier mon rôle", "Gestion #1", and "Me déconnecter". A red circle "1" is positioned above the user icon in the top right corner, and a red circle "2" is positioned over the "Horaires" menu item.

2.1 Create customized schedule.

Create available time slots, one schedule at a time.

1. Select the **schedule location**.
2. Select display (day, week, month).
3. Move your cursor to where you want to create a schedule.
4. With your cursor, click on the starting time.
Keeping your finger on the mouse, move it until the end of the day of the schedule.
An **open time slot** will appear.
5. You can click on the **time** to modify.
6. **Choose the HR member** linked to the service.
7. If the HR member is part of a 'Variable Capacity Team': you can indicate the number of appointments that can be booked within this time frame.
8. Click on the **Services offered** list in the schedule.
9. Every schedule time frame has a capacity calculator:
 - Total minutes - when two services or more are selected.
 - Total number of appointments - when only one service is selected.
10. Click on **Save**.

Mon établissement de santé

CLSC A

Horaires

Suivi

Rendez-vous

Horaires

CLSC A

CLSC B

SEMAINE

14 JOURS

MOIS

dim. 08 sept.

lun. 09 sept.

mar. 10 sept.

ven. 13 sept.

sam. 14 sept.

8 - 14 se

08:30

09:00

09:30

10:00

10:30

11:00

11:30

12:00

12:30

13:00

13:30

Clinique A

Ouverture d'une plage horaire

* Heure de début

09:00

* Heure de fin

12:00

* Choisir la ressource

Équipe de vaccination - Grippe

Nombre de rdv

48 rdv.

Nombre de ressources

4

Par plage horaire

Services sélectionnés

Vaccin grippe

15 min

ENREGISTRER

2.2 Cloning availabilities/time slots

The cloning function lets you copy and paste time frames within the schedule. You can even clone a full day time slots in the same spot.

1. In the navigation bar, select where you want to copy a schedule.
2. **Select** the day(s) you want to create.
If the selected day has an existing schedule, it will be replaced by the new one. Use the cloning function for the empty days.
3. Click on the **Clone** icon
The cloning a day pop-up window will appear.
4. Select the day you want to clone in the schedule.
5. The time slot will be copied in the left column for reference.
6. Click on **Save**.

2.3 Modify a schedule

1. Double click on the day you want to modify. The **Time Frame Settings** pop-up window will appear.
2. You can edit the time slots in the schedule.
3. Click on **Save**.

Move/copy a time frame

4. Select a time slot with your cursor, click-and-drag the segment.
5. Choose your function:
 - Move the time frame
 - Copy the time frame

2.4 View Schedule Availabilities.

1. Open the Schedules filter.

To do so, click on the **funnel icon**.

You can filter your schedules by:

- Date
- View type
- Services
- Locations
- Resources
- Periods (Schedule display)

2. View by*:

- Day
- Week
- Month

3. A small pop-up will appear when hovering your cursor over a time slot:

- Start and end time
- Resource
- Services provided
- Capacity (by minutes or number of appointments)

The screenshot displays the 'Horaires' (Schedules) interface for 'Mon établissement de santé' (CLSC A). The interface includes a sidebar with navigation options: 'Suivi', 'Rendez-vous', and 'Horaires'. The main area shows a weekly calendar view for the week of September 1st to 6th. A filter panel is open, showing options for 'Date', 'Types de vue', 'Services', 'Lieux', 'Ressources', and 'Périodes'. A pop-up window is visible over a time slot (09:00 - 10:00) on Monday, detailing the services provided: 'Infirmière A', 'Dépistage ITSS', and 'Vaccination - Enfant - 4 mois' with a duration of 60 minutes. The interface also shows capacity indicators for each day, such as '0/300 min' for Monday and '25/270 min' for Wednesday.

* Views may differ slightly.

2.5 Manage time slots.

You can open a schedule but opt not to show all dates or time slots online. The padlock function helps you to manage availability..

1. Available Time Slots

A **green** padlock indicates an available online time slot. A user can book an appointment (a patient and/or administrative staff).

2. Unavailable Time Slots

A **red** padlock indicates an unavailable online time slot. This will not appear to the public, only to administrative staff. Only administration can book an appointment.

Lock time slots or entire days if your location offers appointment free walk-ins or if you require time for admin usage.

Locked time slots/ days will not appear in the online booking schedule.

3. Day with locked and unlocked time frames

An **orange** padlock indicates that at least one time slot is locked during that specific day.

The screenshot displays a scheduling interface for 'Mon établissement de santé' (CLSC A) for the week of August 11-17, 2019. The interface includes a sidebar with 'Suivi' and 'Rendez-vous' options, and a main calendar grid. The calendar shows time slots for 'Équipe A' (green) and 'Infirmière A' (pink). Padlocks indicate availability: green for available, red for unavailable, and orange for partially locked. Red circles 1, 2, and 3 highlight specific days: 1 (Monday, 12th) with a green padlock, 2 (Tuesday, 13th) with a red padlock, and 3 (Friday, 16th) with an orange padlock. The calendar also shows appointment counts and a '0%' booking rate for each day.

Day	Équipe A	Infirmière A
Mon. 12 août	Available (Green padlock)	Available (Green padlock)
Mar. 13 août	Unavailable (Red padlock)	Unavailable (Red padlock)
Mer. 14 août	Available (Green padlock)	Unavailable (Red padlock)
Jeu. 15 août	Available (Green padlock)	Unavailable (Red padlock)
Ven. 16 août	Available (Green padlock)	Partially Locked (Orange padlock)



2.6 Modify time slots

Sample #1 - Multiple time slots: No appointments booked yet. You want to create time for a staff break (from 9:20 AM to 10:00 AM).

In daily/weekly view :

1. **Shrink the** time frame with your cursor until you reach 9:20 AM (drag the time slot with the double arrows or double click on the time slot).
2. Click on the **white section** of the schedule to create a new section with fewer time slots thereby creating a break (9:20 AM to 10:00 AM, two appointments by time frame).
3. Click on the **white section** of the schedule to create a new time frame with regular time slots (10:00 AM to 11:00 AM, three appointments by time frame).

The screenshot shows a scheduling interface for 'Mon établissement de santé' (CLSC A) on '1 avril 2020'. The interface includes a sidebar with 'Suivi', 'Rendez-vous', and 'Horaires' (selected). The main area displays a grid with time slots from 08:00 to 11:00. Three steps are illustrated:

- Step 1:** A large green slot labeled '8h à 11h' and '3 rdv / plage horaire' is being shrunk. A double-headed vertical arrow is at the bottom, and a red circle '1' is below it.
- Step 2:** A new green slot labeled '8h à 9h20' and '3 rdv / plage horaire' is created. A mouse cursor is pointing at the white space below it, and a red circle '2' is below it.
- Step 3:** A new green slot labeled '10h à 11h' and '3 rdv / plage horaire' is created. A mouse cursor is pointing at the white space below it, and a red circle '3' is below it.



2.6 Modify time slots

Sample # 2 - Multiple time slots : Some appointments are already booked and I need to make more time slots available.

Daily or weekly view :

- From 8:00 AM to 9:00 AM-No available slots:
- Click on the **white section** of the schedule to create a new time slot (indicate the number of appointments by time frame you wish to **add**)
Ex: Three (3) booked appointments, you want four (4) appointments total, add one '1' .
- From 9:00 AM to 9:40 AM - Two appointments are available : **Double click on the schedule** to modify, and **add** the number of additional appointment you need..
Ex : I have two (2) appointments available and I want to have four (4) in total. Increase by 2.
- From 9:40 AM to 11:00 AM - No availabilities: Click on the **white section** of the schedule in order to create an new time slot (indicate the number of appointments by time slot that you wish to **add**).
Ex: Three (3) booked appointments, I want a total of four (4). Increase by '1'.

The screenshot displays a scheduling interface for 'Mon établissement de santé' (CLSC A) on '1 avril 2020'. The interface shows a grid of time slots from 08:00 to 11:00. The grid is divided into three columns representing different steps in the process:

- Step 1:** The 08:00 slot is white, indicating no available slots. A mouse cursor points to this section.
- Step 2:** The 09:00 slot is green and contains the text '9h à 9h40 2 + 2 = 4 rdv / plage horaire'. A mouse cursor points to this section.
- Step 3:** The 11:00 slot is white and contains the text '9h40 à 11h 1 rdv / plage horaire'. A mouse cursor points to this section.

Red circles with numbers 1, 2, and 3 are placed below the respective steps. The interface also includes a sidebar with 'Suivi' and 'Rendez-vous' options, and a top navigation bar with 'JOUR', 'SEMAINE', and 'MOIS' views.



2.6 Modify time slots

Sample # 3 - Multiple appointments : Fully booked, need to create more available time slots.

Daily or weekly view:

- From 8:00 AM to 11:00 AM - no availabilities: Click on the **white section** of the schedule to create a new time slot (specify the number of appointments by time slot you want to **add**).
Ex: Three (3) booked appointments, I want a total of four (4) appointments in the time slot. Increase by '1'.

The screenshot displays a scheduling interface for 'Mon établissement de santé' (CLSC A) on '1 avril 2020'. The interface features a sidebar with navigation options: 'Suivi', 'Rendez-vous', and 'Horaires'. The main area shows a grid of time slots from 08:00 to 11:00. The grid is divided into two columns. The left column shows a fully booked schedule with diagonal hatching. The right column shows a partially booked schedule with a green lock icon and a text box indicating '8h à 11h 1 rdv / plage horaire'. A red circle with the number '1' and an arrow points to the white section at the bottom of the grid, indicating where to click to add a new time slot.

3. Appointments

The Appointments menu lets you to create or modify appointments for the users.

To access the Appointments Menu:

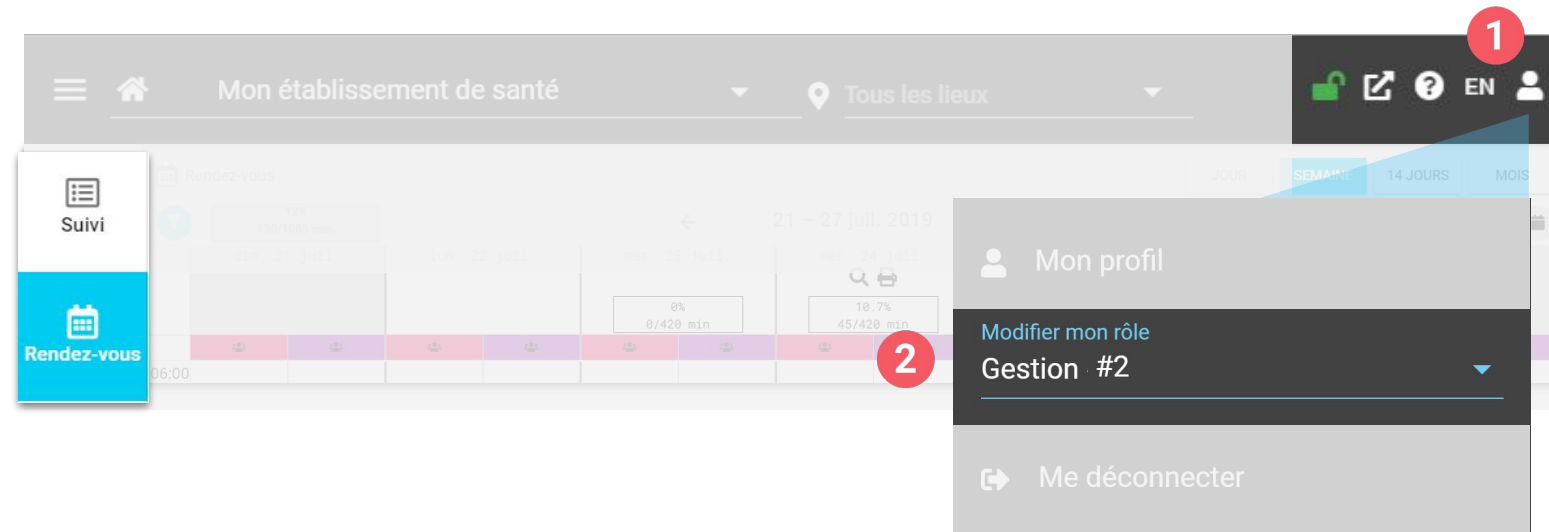
NEW!

If you have more than one role :

1. Click on the **User's** Icon
2. In the scroll-down menu, select **one of your roles**:
 - Manager #1
 - Manager #2
 - Manager #3
 - Read-Only #1
 - Read-Only #2

Reminder: Descriptions of roles :

- **Manager # 1** - Allows you to manage all schedules and all appointments.
- **Manager # 2** - Allows you to manage all appointments.
- **Manager # 3** - Only allows you to manage your schedules and your appointments.
- **Read-Only #1** - Allows read only access to all schedules and all appointments.
- **Read-Only #2** - Allows read only access to your schedules and your appointments.



3.1 Consulting schedule and time slots

Daily and **weekly** view lets you to see the details of available time slots. Monthly view does not show these details.

1. In daily and weekly view, **blue or green** shaded areas indicate available time slots for the public and administration.
2. Times open to both the public and administration will appear grey shaded in the appointment window section.
3. **Red** shaded areas indicate time slots available to administration only - not to the public.
4. These unavailable time slots appear red in the appointment window section.

Blue or green : Online users and/or Admin
Red : Admin only

The screenshot displays a scheduling application interface. At the top, there's a navigation bar with 'Tous les lieux' and various icons. Below it, a sidebar contains 'Suivi' and 'Rendez-vous' options. The main area shows a weekly calendar for '7 - 13 juil. 2019'. The calendar grid has columns for each day from Monday to Saturday. Each day's column shows a percentage of appointments (0%) and a time range (e.g., 0/210 min). A modal window titled 'Attribuer un rendez-vous le 2019-07-10' is open, showing details for a 'Vaccin grippe' appointment at 'CLSC B' with 'Infirmières CLSC B' as the resource. The modal includes a 'Heure du rendez-vous' section with radio buttons for 07:00, 07:25, 07:50, 09:00, 09:25, and 09:50. Red circles with numbers 1, 2, 3, and 4 highlight specific elements: 1 points to blue/green shaded areas in the calendar; 2 points to the 'Heure du rendez-vous' section; 3 points to red shaded areas in the calendar; and 4 points to the 09:00 time slot in the modal.

3.2 Quick view availabilities

In daily or weekly view, you can quickly see remaining available time slots.

1. If **Appointment filters** are closed, click on the funnel to display.
2. In the **View type** tab, select **Availabilities** to quickly see remaining time slots if your schedule contains more than one appointment.

The screenshot displays a scheduling interface for 'Rendez-vous' (appointments) in a weekly view. The top navigation bar includes 'Tous les lieux', 'JOUR', 'SEMAINE', and 'MOIS'. A funnel icon (1) is highlighted in the top left. A sidebar menu on the left shows 'Suivi' and 'Rendez-vous'. A filter menu (2) is open, showing options for 'Date', 'Types de vue' (with 'Disponibilités' selected), 'Services', 'Lieux', 'Ressources', and 'Périodes'. The main calendar grid shows appointments for 'mar. 03 sept.', 'mer. 04 sept.', 'jeu. 05 sept.', and 'ven. 06 sept.' with percentage and time slot indicators.

Day	03 sept.	04 sept.	05 sept.	06 sept.
Percentage	92%	81%	71.2%	72.4%
Time Slot	1150/1250 min	1810/2235 min	740/1040 min	525/725 min

3.3 Book an appointment for a user

In the Appointment planner, you can book an appointment for a user by clicking the **+** symbol.

1. Choose the date and click on the **+** symbol.

If icons do not appear below the date, open the Appointment Filters (funnel icon). Make sure that the Services, Location and Resources for which you want to book an appointment for have been selected.

Appointment details

2. Choose a Service
3. Choose a Location
4. Choose appointment time
5. Go to the next step

The screenshot displays the appointment booking interface. On the left, a calendar view shows the date 03 sept. with a funnel icon (1) and a plus sign (+). A tooltip shows 92% availability and 1150/1250 min. On the right, a modal titled "Attribuer un rendez-vous le 03 septembre 2019" is open. The modal has three tabs: "1 Détails du rendez-vous" (selected), "2 Informations du client", and "3 Coupon imprimable". The "Détails du rendez-vous" tab contains the following fields:

- Choisir un service : Vaccin grippe (2)
- Choisir le lieu : CLSC A (3)
- Choisir la ressource : Infirmière A (3)
- Heure du rendez-vous (4): 07:45 (selected), 08:10, 08:35, 09:25

A blue arrow button (5) is located at the bottom right of the modal. The interface also shows a top navigation bar with "Tous les lieux", "JOUR", "SEMAINE", and "MOIS" options.



3.3 Book an appointment for a user (cont'd)

Client Information

6. Enter the client information.
7. **When entering an email address** and/or a cell phone, the confirmation ticket automatically selects either/both entries. You can uncheck the selection if desired.
8. Click on **Save**.

Tous les lieux

Rendez-vous

JOUR SEMAINE MOIS

mar. 03 sept.

92%
1150/1250 min

Attribuer un rendez-vous le 03 septembre 2019

1 Détails du rendez-vous 2 Informations du client 3 Coupon imprimable

* Prénom
Marie

* Nom de famille
Tremblay

* Courriel
marie@courriel.ca

Téléphone
(111) 111 - 1111

* Cellulaire
(444) 444 - 4444

Envoyer par courriel Envoyer par SMS

ENREGISTRER



3.3 Book an appointment for a user (cont'd)

Appointment confirmation

The confirmation message displays the appointment details.

From this window, you can :

NEW!

1. [Edit an appointment.](#)
[Book a new appointment for this user.](#)
2. **Close** the confirmation window.

Tous les lieux

Attribuer un rendez-vous

1 Détails du rendez-vous 2 Informations du client 3 Coupon imprimable

Confirmation de rendez-vous - E2I1A4

Options pour ce rendez-vous : 1

Nom du client : Marie Tremblay
Service : Vaccin grippe
Avec : John
Quand : mardi 14 avril 2020
Heure : 07:45 (20 min)
Coût : \$
Lieu : CLSC A
Adresse : 453 Rue Sacré Coeur O Alma G8B1M4 Canada
Courriel : crobert@trimoz.com

Message important:
Veuillez vous garer à l'arrière du bâtiment.

Consignes:
Veuillez porter un chandail à manches courtes.

Informations supplémentaires:

- Vous recevrez ce coupon de confirmation par courriel à crobert@trimoz.com
- 48h avant votre rendez-vous, vous recevrez un rappel par courriel à crobert@trimoz.com

2 FERMER



3.4 Edit an appointment

1. **Double click** on the appointment to edit. Appointment details will appear.

2. Click on the **Edit** button.

3. You can edit :

→ **Previous or cancelled appointments**
Comments tab
Client information

→ **Future appointments**
Service
Location
Date
Appointment time
Comments tab
Client information

Nouveauté !

4. Go to the next step by clicking on **Save**.

The screenshot displays the appointment management interface. The top navigation bar includes 'Tous les lieux' and various utility icons. The main content area is divided into two panels: 'Consulter un rendez-vous' (View Appointment) and 'Modifier un rendez-vous' (Edit Appointment).

Consulter un rendez-vous: This panel shows appointment details for 'mar. 03 sept.' at 11:50/12:50 min. It includes a 'Confirmation de rendez-vous - E211A4' and a list of options: 'Options pour ce rendez-vous :'. A red circle '2' highlights the 'Modifier le rendez-vous' button.

Modifier un rendez-vous: This panel allows editing the appointment. It features a progress bar with three steps: '1 Détails du rendez-vous', '2 Informations du client', and '3 Coupon imprimable'. The form includes the following fields:

- Choisir un service : Vaccin grippe
- Choisir le lieu : CLSC A
- Choisir la date : 2020-04-14
- Heure du rendez-vous : John
 - 06:45
 - 07:05
 - 07:25
 - 07:45
 - 08:05
 - 08:25
 - 08:45
 - 09:05
 - 09:25
- Commentaires & notes

A red circle '4' highlights the 'Save' button at the bottom right of the form.

3.5 Book a new appointment for a user

You can create a new appointment for a user from a pre-existing appointment.

NEW!

Identify the user for whom you'd like to book an appointment.

1. Double click on the appointment to edit. Appointment details will appear.
Make sure you validate the user's identity
2. Click on the **Book an new appointment for this user** icon.
3. Select **service, location, date** and **time** of the new appointment.
4. Go to the next step.
5. The **Client information** should be pre-filled.
6. Click on **Save**.

The screenshots illustrate the following steps:

- Step 1:** A calendar view showing an appointment for 'mar. 03 sept.' with a double-click icon (hand cursor) over it.
- Step 2:** A modal titled 'Consulter un rendez-vous' showing appointment details for 'Marie Tremblay' and a '+ Book an new appointment for this user' icon.
- Step 3:** A form titled 'Ajouter un nouveau rendez-vous pour cet usager : Bébé Tremblay' with fields for 'Choisir un service' (Vaccin - 4 mois), 'Choisir le lieu' (CLSC B), 'Choisir la date' (2020-04-07), and 'Heure du rendez-vous' (07:40 selected).
- Step 4:** The same form with pre-filled client information: 'Prénom: Marie', 'Nom de famille: Tremblay', 'Courriel: marie@courriel.ca', and 'Prénom de l'enfant: Bébé'. The 'ENREGISTRER' button is highlighted.

3.6 View booked appointments

1. If the **Appointment filters** are closed, click on the **funnel icon** to open.

You can screen/filter the appointments by:

- Date (Schedule)
- View types (See openings and/or appointments)
- Services
- Location
- Resources
- Time slots (schedule display)

2. **Three available views:**

- Daily
- Weekly
- Monthly

3. **A small pop-up will appear if you hover your cursor over an appointment.**

Details:

- Appointment time
- Service
- Client name
- Children's name
- Location
- Comments tab

The screenshot displays a web-based appointment management system. On the left, a sidebar contains a 'Suivi' (Follow-up) section and a 'Rendez-vous' (Appointments) section. The main area is titled 'Filtrer les RDV' (Filter appointments) and includes several filter categories: 'Date', 'Types de vue' (View types), 'Services', 'Lieux' (Locations), 'Ressources' (Resources), and 'Périodes' (Periods). The 'Types de vue' section is expanded, showing options for 'Dispo/RDV' (Availability/Appointments), 'Disponibilités' (Availability), and 'Rendez-vous' (Appointments). The 'Services' section is also expanded, showing 'Tous' (All) selected, along with 'Dépistage ITSS' and 'Vaccin grippe'. The main calendar view shows a weekly layout for the week of September 3rd to 5th. A red circle '1' highlights a funnel icon in the top left of the calendar grid. A red circle '2' highlights the 'SEMAINE' (Week) view button in the top right. A red circle '3' highlights a specific appointment slot on Wednesday, September 3rd, from 10:20 to 10:40. A mouse cursor is hovering over this slot, and a pop-up window displays the appointment details: '10:20 - 10:40', 'Prélèvement sanguin' (Blood test), 'Marie Temblay', and 'Clinique médicale A'. The calendar grid also shows availability percentages for each day: 92% (1150/1250 min) on Tuesday, 81% (1810/2235 min) on Wednesday, and 71.2% (740/1040 min) on Thursday.



4. Follow-up

The **Follow-up** menu gives access to appointment listings, as well as appointment searches.

To access the **Follow-up menu**:

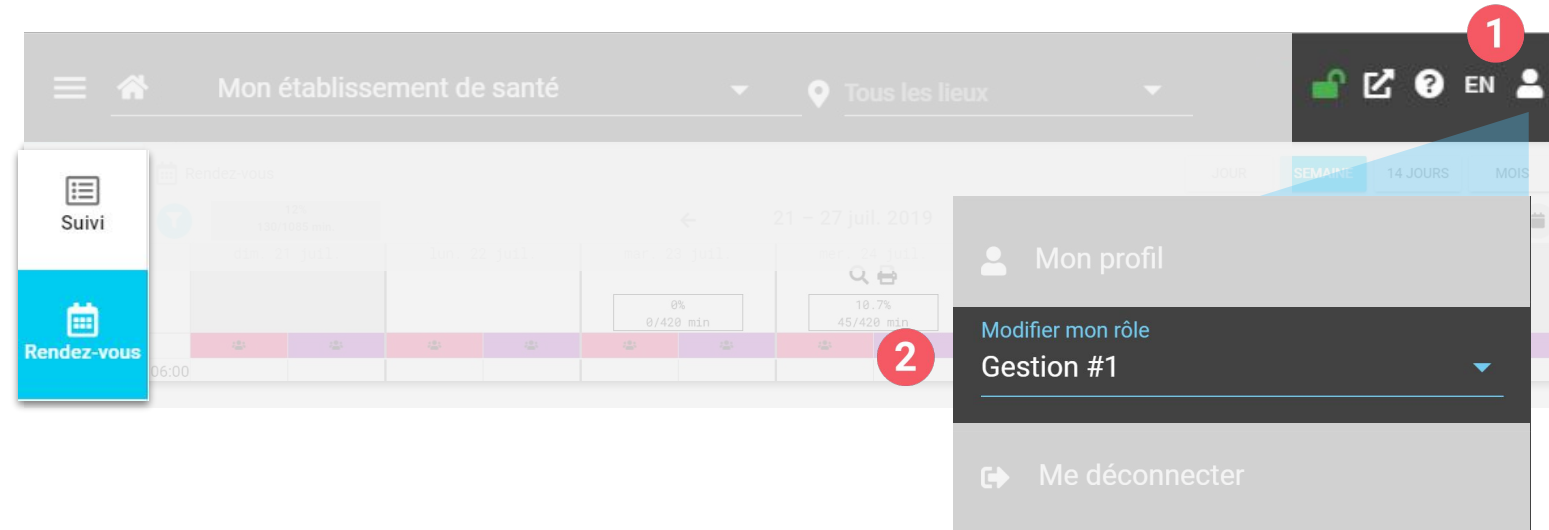
If you have more than one role :

NEW !

1. Click on the **user's icon**.
2. In the scroll down menu, select one of the roles:
 - Manager #1
 - Manager #2
 - Manager #3
 - Read-Only #1
 - Read-Only #2

Reminder: Descriptions of roles :

- **Manager # 1** - Allows you to manage all schedules and all appointments.
- **Manager # 2** - Allows you to manage all appointments.
- **Manager # 3** - Only allows you to manage your schedules and your appointments.
- **Read-Only #1** - Allows read only access to all schedules and all appointments.
- **Read-Only #2** - Allows read only access to your schedules and your appointments.
-



4.1 Dashboard overview

1. Available **reports list**.
2. Different **View types**.
3. **Add or modify columns** in the schedule
4. **Print or Export results (spreadsheet)**
5. **Filter** displayed appointments.
Look for an appointment
6. **Action items:**
 - Confirm Presence / Absence
 - Confirm an appointment
 - Send a reminder
 - Cancel an appointment
7. **See appointment details**
Modify an appointment
Add a new appointment for a user.
8. **Appointment status and history**
9. Modify the number of results per page.

The screenshot shows a web interface for a healthcare establishment. The header includes navigation icons, the establishment name 'Mon établissement de santé', and location 'Tous les lieux'. A sidebar on the left has 'Suivi' and 'Rendez-vous' buttons. The main area displays a table of appointments with columns for Actions, Date, Heure, Service, Statut client, Statut RDV, # Coupon, and Source. A date range '17 - 23 nov. 2019' is shown. A dropdown menu is open over the table, showing a search filter (5) and a 'Rendez-vous' button (6). The table contains several rows of appointment data. At the bottom, there are pagination controls (7, 8) and a 'Résultats par page' dropdown (9).

Actions	↑ Date	↑ Heure	Service	Statut client	Statut RDV	# Coupon	Source
<input type="checkbox"/>	2019-11-18	18:00	Vaccin grippe	Non défini	Réservé	9G4G4I	Admin
<input type="checkbox"/>	2019-11-19	06:00	Vaccin grippe	Annulé	Réservé	L6A6G6	Admin
<input type="checkbox"/>	2019-11-19	06:00	Vaccin grippe	Non défini	Réservé	7H7J7F	Admin
<input type="checkbox"/>	2019-11-19	06:00	Vaccin grippe	Annulé	Réservé	8J6G5K	Admin
<input type="checkbox"/>	2019-11-19	06:15	Vaccin grippe	Annulé	Réservé	8E3K8G	Admin
<input type="checkbox"/>	2019-11-19	11:30	Vaccin grippe	Annulé	Réservé	2A6H1I	Admin
<input checked="" type="checkbox"/>	2019-11-19	19:00	Vaccin grippe	Non défini	Réservé	E5K3K8	Admin
<input type="checkbox"/>	2019-11-19	21:00	Vaccin grippe	Présent	Réservé	2I6F7C	Public
<input type="checkbox"/>	2019-11-19	21:30	Vaccin grippe	Non défini	Réservé	9I5G9I	Admin



4.2 View Daily Appointments

1. In the scroll down menu, select **All appointments (without cancellations)**.
2. Select Daily view to see the appointments for that day.
3. To add or modify a column:
Click on the **Add / Modify columns**
Select the information you want to appear on the schedule.

Not seeing all of your appointments ?

Select more results per page at the bottom right of your window. You can select up to 100 results per page.



The screenshot shows the 'Mon établissement de santé' interface. A dropdown menu (1) is open, showing options for appointment filters. A second dropdown menu (2) is open, showing options for column selection. A third dropdown menu (3) is open, showing options for results per page.

Appointment Filter Options:

- Tous les rendez-vous (avec annulations)
- Tous les rendez-vous (sans annulations)**
- Rendez-vous non confirmés
- Rendez-vous confirmés
- Rendez-vous annulés
- Clients non définis
- Clients présents
- Clients absents

Column Selection Options:

- Tous
- Actions
- Date
- Heure
- Prénom
- Nom
- Date de naissance
- Nom enfant
- Date de naissance enfant
- Service
- Rappel
- Relance
- Statut client
- Statut RDV

Results per Page:

Résultats par page: 100

4.3 Filter displayed appointments



To filter the appointment list:

1. **If the search parameters are not open**, click on the funnel icon.

Filter the list of appointments by:

A. Date

Easily from from one day to another.

B. Services

Select one or more services.

C. Locations

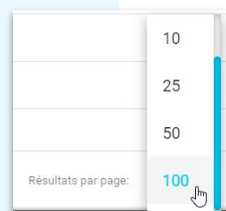
Select one or more locations. (Using the same scroll down menu in the navigation bar).

D. Resources

Select one or more resource.

Not seeing all of your appointments ?

Select more results per page at the bottom right of your window. You can select up to 100 results per page.



The screenshot shows the 'Mon établissement de santé' interface. A search filter menu is open, displaying the following options:

- Date** (A)
- Services** (B)
 - Tous
 - Vaccin enfant de 2 mois
 - Vaccin enfant de 4 mois
 - Vaccin enfant de 6 mois
 - Vaccin enfant de 12 mois
- Lieux** (C)
- Ressources** (D)
- Recherche avancée

The background shows a table of appointments with columns: Service, Statut client, Statut RDV, # Coupon, and Source. The table contains several rows of data, including 'Vaccin grippe' appointments with various statuses like 'Non défini', 'Annulé', and 'Présent'.



4.4 Find an appointment



1. Select the report **All appointments (with cancellations)** in the scroll down menu.
**In doing so, if an appointment was canceled, it will display in the results.*
2. Select **3 month view** to look for an appointment over a longer time period.
3. If **Search Parameters** are closed, click on the funnel icon to open.
4. The **Advanced Search** allows for cross referenced search functions.
(*ex :search first name AND by birthdate*)

Enter a search parameter into one of the search tabs.

The screenshot shows the 'Mon établissement de santé' interface. The top navigation bar includes a home icon, the title 'Mon établissement de santé', a location filter 'Tous les lieux', and user settings. The main content area is titled 'Tous les rendez-vous (avec annulations)'. A dropdown menu is open, showing two options: 'Tous les rendez-vous (avec annulations)' (highlighted with a red circle 1) and 'Tous les rendez-vous (sans annulations)'. Below this, a 'Paramètres de recherche' menu is open, listing filters for Date, Services, Lieux, and Ressources. A 'Recherche avancée' section is also open, showing input fields for 'Numéro de coupon', 'Prénom / Nom de l'enfant' (with the value 'soph'), 'Date de naissance de l'enfant' (with the format 'AAAA-MM-JJ'), and 'Prénom / Nom du client'. A red circle 4 highlights the 'Recherche avancée' section. In the background, a table of appointments is visible with columns for 'Statut RDV', '# Coupon', and 'Source'. The table shows several rows of appointment data, including dates and statuses like 'Réservé', 'Annulé', and 'Présent'. A red circle 2 highlights the '3 MOIS' view selector in the top right. A red circle 3 highlights the funnel icon in the top left of the main content area.

Statut RDV	# Coupon	Source
Réservé	9G4G4I	Admin
Réservé	L6A6G6	Admin
Réservé	7H7J7F	Admin
Réservé	8J6G5K	Admin
Réservé	8E3K8G	Admin
Réservé	2A6H1I	Admin
Réservé	E5K3K8	Admin
Réservé	2I6F7C	Public
Réservé	9.I5G9I	Admin



4.5 Print appointment list



1. Click on the **printer icon** to print the daily appointments.

You can **print** up to a maximum of 100 appointments at a time. (Per page results will be displayed).

Mon établissement de santé

Tous les lieux

Tous les rendez-vous (sans annulations)

JOUR SEMAINE MOIS 3 MOIS

AUJOURD'HUI

← 29 janv. 2020 →

	Actions	Date	Heure	↑ Prénom	Nom
<input type="checkbox"/>		2020-01-29	08:00	Gylaine	Bouchard
<input type="checkbox"/>		2020-01-29	08:00	Jean	Simard
<input type="checkbox"/>		2020-01-29	08:00	Marie	Tremblay

Résultats par page: 100 1-3 of 3

Not seeing all of your appointments ?

Select more results per page at the bottom right of your window. You can select up to 100 results per page.

Résultats par page: 100

4.6 Export appointment list to a file.

1. Click on the **Excel file** icon
2. An “Export Successful” message will appear when completed.

An Excel file will be sent to you **by email**.

The screenshot shows a web application interface for managing appointments. The top navigation bar includes a home icon, the text 'Mon établissement de santé', a location dropdown 'Tous les lieux', and user profile icons. A sidebar on the left contains 'Suivi' and 'Rendez-vous' options. The main content area displays a table of appointments for the date '17 - 23 nov. 2019'. The table has columns for 'Actions', 'Date', 'Heure', 'Service', 'Statut client', 'Statut RDV', and '# Coupon'. A red circle '1' highlights the Excel file icon in the top right corner of the table. A dark blue notification banner at the bottom of the table, marked with a red circle '2', contains the text: 'Exportation réussie! Lorsque votre document sera créé, vous recevrez un courriel à courriel@courriel.ca'.

Actions	↑ Date	↑ Heure	Service	Statut client	Statut RDV	# Coupon	
<input type="checkbox"/>	2019-11-18	18:00	Vaccin grippe	Non défini	Réservé	9G4G4I	Admin
<input type="checkbox"/>	2019-11-19	06:00	Vaccin grippe	Annulé	Réservé	L6A6G6	Admin
<input type="checkbox"/>	2019-11-19	06:00	Vaccin grippe	Non défini	Réservé	7H7J7F	Admin
<input type="checkbox"/>	2019-11-19	06:00	Vaccin grippe	Annulé	Réservé	8J6G5K	Admin
<input type="checkbox"/>	2019-11-19	06:15	Vaccin grippe	Annulé	Réservé	8E3K8G	Admin
<input type="checkbox"/>	2019-11-19	11:30	Vaccin grippe	Annulé	Réservé	2A6H1I	Admin
<input type="checkbox"/>	2019-11-19	19:00	Vaccin grippe	Non défini	Réservé	E5K3K8	Admin
<input type="checkbox"/>	2019-11-19						Public
<input type="checkbox"/>	2019-11-19						Admin

4.7 Classify a user as “present”



Search for user name in the appointment list.

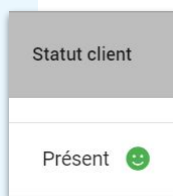
1. Click on the **check box** to select an appointment.
2. A **batch actions** window will appear near the bottom of the screen.

Select the action: **present**

3. Click on **present** to confirm.

The present symbol will appear in the column “Client status” beside the user name.

If you can’t see the ‘Client status’ in your window, go back to the section [Look at the scheduled appointments of the day](#) to illustrate adding a column.



Mon établissement de santé

Tous les lieux

Tous les rendez-vous (sans annulations)

JOUR SEMAINE MOIS 3 MOIS

AUJOURD'HUI

← 29 janv. 2020 →

Actions	Date	Heure	↑ Prénom	Nom
<input checked="" type="checkbox"/>	2020-01-29	08:00	Guylaine	Bouchard
<input type="checkbox"/>	2020-01-29	08:00	Jean	Simard
<input type="checkbox"/>				

Actions Actions en lot - 1 rendez-vous sélectionné(s)

↑ Date	↑ Heure	Service	Rappel	Relance	Statut client	Statut RDV	Actions
2019-09-03	09:00	Vaccin grippe	Rappel (2)	Relance (0)	Non défini	Réservé	

Marquer des rendez-vous comme présent

Vous êtes sur le point de marquer tous les rendez-vous sélectionnés comme présent. Voulez-vous continuer?

PRÉSENT

4.8. Classify one or more user(s) as “absent”



At day’s end, classify multiple users as absent:

1. Click on the **check box** in order to select the appointment.
2. A **batch actions** window will appear near the bottom of the screen. Select the action: **absent**.
3. Click on **absent** to confirm.

The absence symbol will appear in the column “Client status” beside the user name.

If you can’t see the ‘Client status’ in your window, go back to the section [Look at the scheduled appointments of the day](#) to illustrate adding a column.

The screenshot shows the 'Mon établissement de santé' interface. The main table displays appointments for '29 janv. 2020'. Two appointments are selected (checked boxes). A 'Batch Actions' window is open, showing the 'Absent' option selected. A confirmation dialog box asks 'Marquer des rendez-vous comme absent' and 'Voulez-vous continuer?' with an 'ABSENT' button.

Actions	Date	Heure	Prénom	Nom
<input type="checkbox"/>	2020-01-29	08:00	Guylaine	Bouchard
<input checked="" type="checkbox"/>	2020-01-29	08:00	Jean	Simard

Actions en lot - 2 rendez-vous sélectionné(s)								
	Date	Heure	Service	Rappel	Relance	Statut client	Statut RDV	Actions
Présent	2020-01-29	08:00	Clinique d'hiver	Rappel (0)	Relance (0)	Non défini	Réservé	
Absent	2020-01-29	08:00	Clinique d'hiver	Rappel (0)	Relance (0)	Non défini	Réservé	
Confirmer	2020-01-29	08:00	Clinique d'hiver	Rappel (0)	Relance (0)	Non défini	Réservé	
Rappel								
Relancer								
Annuler								

Marquer des rendez-vous comme absent

Vous êtes sur le point de marquer tous les rendez-vous sélectionnés comme absent. Voulez-vous continuer?

ABSENT

↓ Statut client

Absent

4.9. Cancel an appointment



Select the appointment you want to cancel on your list.

1. Click on the **check box** to select appointment.
2. A **batch actions window** will appear near the bottom of the screen..
Select the action: **cancel**
3. Choose the notification type and **Save**.

The cancelled symbol will appear in the column "Client status" beside the user name.

If you can't see the 'Client status' in your window, go back to the section [Look at the scheduled appointments of the day](#) to illustrate adding a column.

Statut client
Annulé

Mon établissement de santé

Tous les lieux

Tous les rendez-vous (sans annulations)

JOUR SEMAINE MOIS 3 MOIS

AUJOURD'HUI

← 29 janv. 2020 →

	Actions	Date	Heure	↑ Prénom	Nom
<input type="checkbox"/>		2020-01-29	08:00	Guylaine	Boucard
<input checked="" type="checkbox"/>		2020-01-29	08:00	Jean	Simard
<input type="checkbox"/>					

Actions en lot - 2 rendez-vous sélectionné(s)

Actions	Date	Heure	Service	Rappel	Relance	Statut client	Statut RDV	Actions
	2020-01-29	08:00	Clinique d'hiver	Rappel (0)	Relance (0)	Non défini	Réservé	
	2020-01-29	08:00	Clinique d'hiver	Rappel (0)	Relance (0)	Non défini	Réservé	

Annuler des rendez-vous

Choisir le type de notification:

Courriel

SMS

Sans avis

* Des rendez-vous n'ont pas le champs cellulaire

ENREGISTRER

4.10 Edit an appointment

Select the user for whom you want to edit the appointment.

- In the **actions column**, click on the **eye icon**. Details of the appointment will appear.
****Make sure to validate the user's identity****
- Click on **Edit** in the right upper side of your screen.
- You can edit :
 - ➔ **Previous or cancelled appointments**
 - Comments tab
 - Client personal information
 - ➔ **Future appointments**
 - Service
 - Location
 - Date
 - Time of the appointment
 - Comments tab
 - Client personal information
- Click **Save** to go to the next step.

New !

Not displaying the “actions” on your board ? Go to section: [Scheduled daily appointments](#) to add a column to your board.

The screenshot displays the 'Mon établissement de santé' interface. On the left, a sidebar shows search filters for 'Suivi' and 'Rendez-vous'. The main board shows a list of appointments with an 'Actions' column. A red circle '1' highlights the eye icon in the Actions column. A modal window 'Consulter un rendez-vous' is open, showing appointment details for 'Marie Tremblay' on '2020-01-14'. A red circle '2' highlights the 'Modifier le rendez-vous' button. A second modal window 'Modifier un rendez-vous' is shown below, with red circles '3' and '4' highlighting the service selection ('Vaccin grippe') and the 'Save' button, respectively.

4.11 Create a new appointment for a user.

You can now create a new appointment for a user with a pre-existing appointment.

NEW !

Identify the user for whom you would like to create a new appointment.

1. In the **actions** column, click on the **eye** icon. Appointment details will appear.
** Make sure to **validate the user's identity** **
2. Click on the + **book a new appointment for this user**.
3. Select the **service, location, date** and **time** of the appointment.
4. Go to next step.
5. The user personal information should already be entered.
6. **Save**.

Not displaying the "actions" on your board ? Go to section: [Scheduled daily appointments](#) to add a column to your board.

Mon établissement de santé

Tous les lieux

Consulter un rendez-vous

1 Détails du rendez-vous 2 Informations du client 3 Coupon imprimable

Confirmation de rendez-vous - E211A4

Nom du client : Marie Tremblay
Service : Vaccin grippe
Avec : John
Quand : mardi 14 avril 2020
Heure : 07:45 (20 min)
Coût : \$
Lieu : CLSC A
Adresse : 453 Rue Sacré Coeur O Alma G8B1M4 Canada
Courriel : crobert@trimoz.com

Options pour ce rendez-vous :

Ajouter un nouveau rendez-vous pour cet usager

Message important:
Veuillez vous garer à l'arrière du bâtiment.

Ajouter un nouveau rendez-vous pour cet usager :
Bébé Tremblay

1 Détails du rendez-vous 2 Informations du client 3 Coupon imprimable

Choisir un service :
Vaccin - 4 mois

Choisir le lieu :
CLSC B

Choisir la date
2020-04-07

Heure du rendez-vous
John

07:00 07:20 07:40 08:00 08:20 08:40
09:00 09:20 09:40 10:00 10:20 10:40
11:00

Commentaires & notes

ENREGISTRER

Ajouter un nouveau rendez-vous pour cet usager :
Bébé Tremblay

1 Détails du rendez-vous 2 Informations du client 3 Coupon imprimable

* Prénom
Marie

* Nom de famille
Tremblay

Courriel
marie@courriel.ca

Téléphone

Cellulaire

* Prénom de l'enfant
Bébé

* Nom de famille de l'enfant
Tremblay

FR

ENREGISTRER

Section C

Online Appointment Booking



1. User booking process



2. User booking process

1. Select a **service** and click on **continue**.

The screenshot shows the CLIC SANTÉ .CA website's online booking process. At the top, there are navigation links: "PRENDRE UN RENDEZ-VOUS", "PROGRAMMER UN RAPPEL", "ANNULER UN RENDEZ-VOUS", "NOUS JOINDRE", and "EN". The main header features a photo of a smiling woman and child, with the text "Prise de rendez-vous en ligne" and "Mon établissement de santé". Below this, a welcome message reads "Bienvenue sur la page de réservation de votre centre de santé!". A progress bar with four steps is shown: 1. Sélectionnez un service (highlighted), 2. Sélectionnez le lieu, 3. Sélectionnez le moment, and 4. Complétez votre réservation. Under step 1, three service options are listed: "Dépistage ITSS", "Vaccin grippe" (highlighted), and "Prélèvement sanguin". Each option has a "CONTINUER >" button to its right.

User booking process (cont'd)

2. Enter your postal code and the **location**, then click on **continue**.

The screenshot shows the CLIC SANTÉ website's booking process. At the top, there are navigation links: "PRENDRE UN RENDEZ-VOUS", "PROGRAMMER UN RAPPEL", "ANNULER UN RENDEZ-VOUS", "NOUS JOINDRE", and "EN". The main header features the CLIC SANTÉ logo and a banner image of a smiling woman and child, with the text "Prise de rendez-vous en ligne" and "Mon établissement de santé". Below the banner, a message reads "Bienvenue sur la page de réservation de votre centre de santé!". A progress bar indicates four steps: 1. "Prélèvement sanguin" (checked), 2. "Sélectionnez le lieu" (current step), 3. "Sélectionnez le moment", and 4. "Complétez votre réservation". The main content area has a search bar for postal codes with the text "* Entrez votre code postal:" and "Code postal G0W2L0". Below the search bar, two location options are listed: "CLSC A ~ 7 km" and "CLSC B ~ 30 km", each with a "CONTINUER >" button.

CLIC SANTÉ .CA

PRENDRE UN RENDEZ-VOUS PROGRAMMER UN RAPPEL ANNULER UN RENDEZ-VOUS NOUS JOINDRE EN

Prise de rendez-vous en ligne
Mon établissement de santé

Bienvenue sur la page de réservation de votre centre de santé!

1 Prélèvement sanguin 2 Sélectionnez le lieu 3 Sélectionnez le moment 4 Complétez votre réservation

* Entrez votre code postal: Code postal G0W2L0

CLSC A ~ 7 km CONTINUER >

CLSC B ~ 30 km CONTINUER >

User booking process (cont'd)

3. Choose the **date and time** and click on **continue**.

CLIC SANTÉ .CA

PRENDRE UN RENDEZ-VOUS PROGRAMMER UN RAPPEL ANNULER UN RENDEZ-VOUS NOUS JOINDRE EN

Prise de rendez-vous en ligne
Mon établissement de santé

Bienvenue sur la page de réservation de votre centre de santé!

Prélèvement sanguin CLSC A **3 Sélectionnez le moment** 4 Complétez votre réservation

Août 2019

dim.	lun.	mar.	mer.	jeu.	ven.	sam.
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Heure du rendez-vous

09:00 09:15 09:30 09:45
10:30 10:45 11:00 11:15

CONTINUER

User booking process (cont'd)

- Complete the registration form and click on **submit**.

CLIC SANTÉ .CA

PRENDRE UN RENDEZ-VOUS PROGRAMMER UN RAPPEL ANNULER UN RENDEZ-VOUS NOUS JOINDRE EN

Prise de rendez-vous en ligne
Mon établissement de santé

Bienvenue sur la page de réservation de votre centre de santé!

Prélèvement sanguin CLSC A mardi 13 août 2019 à 09:00 **4** Complétez votre réservation

* Prénom
Marie

* Nom de famille
Bouchard

Courriel
marie@courriel.ca

Téléphone
(111) 111 - 1111

SOUMETTRE