

# Quick Setup Guide

## STEP 1: Log in and Links

Refer to Full Step-by-Step Guide for more detailed information)

### 1. Links

- a. Access the Admin portal here: <https://b.telehippo.com/r/login>.

*Save this link to your bookmarks and create as a shortcut on all the devices you will be using to access your admin portal.*

### 2. Vendor ID, log in email and password

- a. **Vendor ID.** You will need this when signing in each time. You can also tick “Remember Me” on the login page to save the vendor ID.

*If you ever forget your Vendor ID in the future, you can always see it at the end of your booking link: <https://b.telehippo.com/o/VENDOR-ID>. You can also find your booking links by going to the **Online Booking** menu in the Admin portal.*

- b. **Confirmation of your email.** Your email is used to login to system and to receive all your booking email notifications. If the email is not correct, you will need to login, go to **Settings --> Staff --> Pharmacist Team --> Edit --> Email**. This will impact both your login and where your internal notifications will go.
- c. **Password.** After logging in for the first time, we recommend changing your password for added security. Go ahead and reset your password now: [https://b.telehippo.com/r/forgot\\_password](https://b.telehippo.com/r/forgot_password). The password has restrictions to make it more secure. If an error “weak password” appears please ensure you follow the password requirements and note that some symbols are not recognized e.g. you may use any of the following symbols: !@#\$%^&.

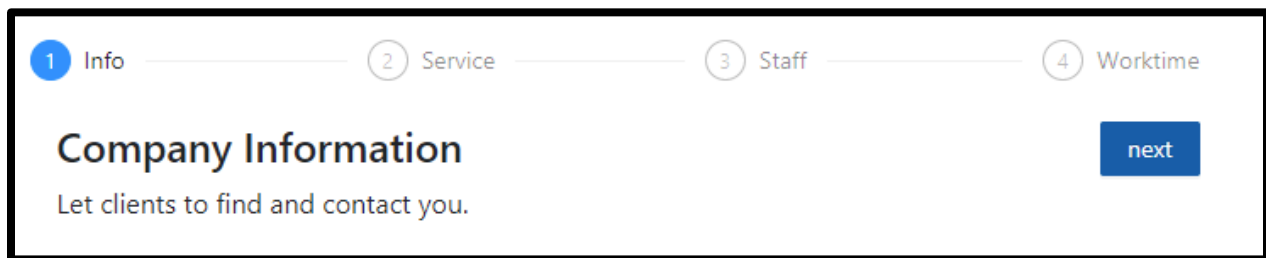
# STEP 2: Setting up your pharmacy

After you reset your password, and arrive the Scheduler screen, click on:

## Settings → Initial Setup

Now review each section and ensure each section is setup as these fields impact your booking webpage and the patient email confirmations that they receive after making a booking.

You can always come back to the Company information section by going to Settings→ Account.



1. **Company name.**
  - a. Shows on your booking page.
  - b. Auto-populated on the vaccine screening forms (and other screening forms).
  - c. Used in automated emails and SMS texts.
2. **Time zone:** e.g. America/Vancouver (this is locked, if this is incorrect, please contact [info@bcpharmacy.ca](mailto:info@bcpharmacy.ca) to update this for you before launching your Online Booking Platform as this will impact your booking slots).

### Advanced (Optional)

#### **IMPORTANT NOTE:**

Be sure to setup this area not only to ensure patients see the right information about your pharmacy, but also because the email confirmations to patients rely on this address information to confirm their appointment location.

3. **Customer Support.**
  - a. This information will appear at the bottom of your booking page.
  - b. The Support Email listed here is visible to your patients so they can contact you for inquiries. Adding/changing the email address here does not impact your booking confirmation emails you will receive or the login account email.
4. **Address (For retail locations).**
  - a. This address will automatically appear in your automated email and SMS texts to patients.

b. This information will also appear at the bottom of your booking page.

5. **Branding.**

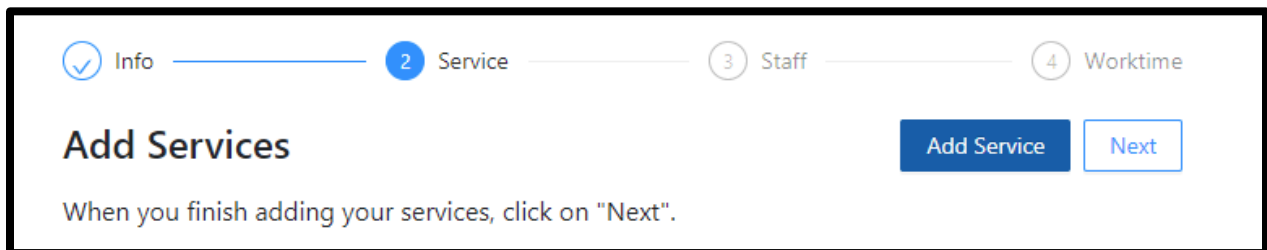
- a. Your vendor ID is listed as reference. Limit 10-characters. This is not available for editing.
- b. Upload your own logo. Improve branding and upload your own logo if available. This will appear on your booking page.
- c. Images accepted include JPG.

6. **Scheduler Settings.**

- a. Controls the size of the calendar patients will see.
- b. Does not control booking time slots available to patients.
- c. If you notice the times are cut-off in your **Scheduler** calendar this is where you would edit the times to expand the times that appear in your **Scheduler** calendar.

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Click on the **next** button on the top right to advance to the **Service** section.



By default, we have already setup a Flu Vaccination service for you. You can click on (edit) and Advance (optional) to review the settings.

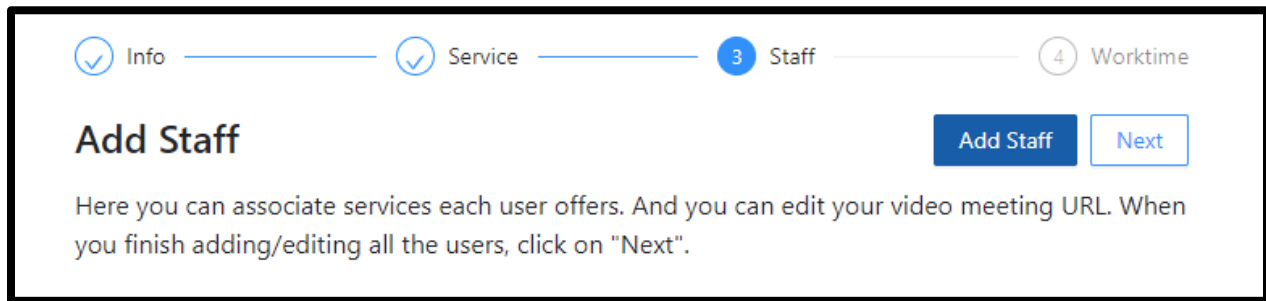
Feel free to add additional services if you plan to accept appointments for more additional services.

You can always come back to the Services section by going to Settings → Services.

Please refer to the full Step-by-Step Guide for all the details on the settings.

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Click on the **next** button on the top right to advance to the **Staff** section.



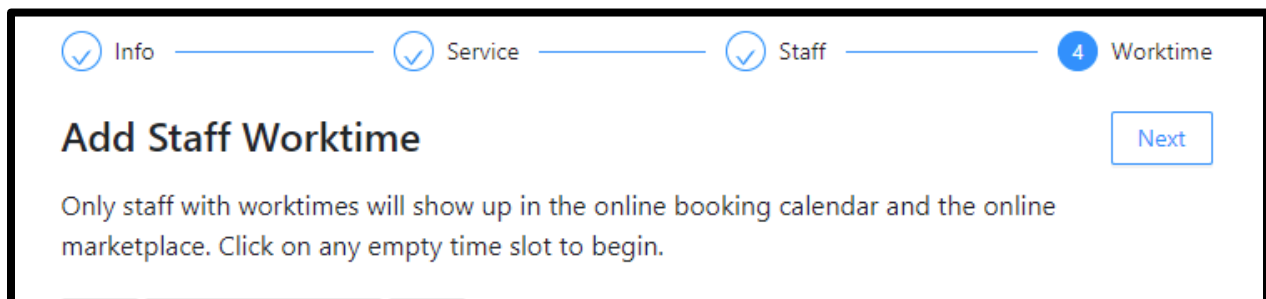
By default, we have already setup a staff person called **Pharmacist Team** who is linked to your Flu Vaccination service. You can click on (edit) and Advance (optional) to review the settings if you like.

If you added new services, but sure to click on Associate Service to link the **Pharmacist Team** staff to the new service.

You can always come back to the Staff section by going to Settings → Staff.

Please refer to the full Step-by-Step Guide for all the details on the settings.

Click on the **next** button on the top right to advance to the **Worktime** section.



**IMPORTANT NOTE:**

This section allows you to set the schedule when you would like to accept appointments. Be very careful when setting up blocks. If you make a mistake or allow for too many time slots for patients to book, it will be a lot of work to cancel and rescheduling.

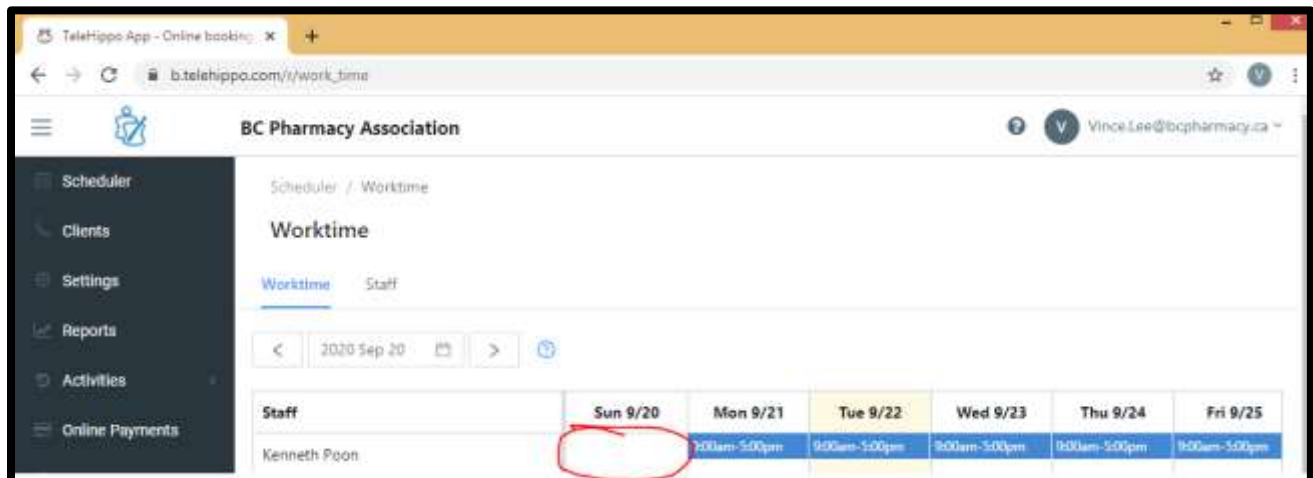
You do not want to get in the situation where you accidentally overbook.

You can always come back to the Worktimes section by going to Settings → Worktimes.

Worktimes are your appointment slots.

### Adding Shifts (time slots)

1. You need to click on the white, blank space/box that is in-line with the pharmacist and day of the week then a pop-up window will appear for you to edit.



2. **Repeat?** You may choose to auto-populate multiple weeks/months at once by selecting **repeated weekly until specific date** in the drop-down menu. Do not use the repeated weekly forever function as this will open bookings forever and likely result in you needing to cancel a lot of appointments in the future plus patients may accidentally book an appointment for the wrong year not realizing they have selected a date in 1+ years in the future. We recommend that upon initial launch of your booking platform to only accept appointments for the first 2-4 weeks to test it out and then gradually open more time slots as you get use to the system and how it works for your pharmacy.
3. Repeat steps 1 and 2 above for each day of the week that you would like appointments to be available.
4. If you need to edit a time slot, just click on the time (e.g. 9:00am-5:00pm in blue in the example above) and the "Add a shift" window will pop-up again, make your changes and then click **Save**.  
NOTE: If a patient has already booked an appointment within the time slot that you have just edited, it will not automatically cancel / delete their appointment. The only way to cancel / delete an appointment is by clicking an appointment in your **Scheduler** and click **Cancel** or if your patient cancels it online themselves.
5. If you have a block of time that you do not accept bookings, just add two time slots (e.g. you offer between 10-1pm no bookings from 1-2pm and then again 2-4pm you would add two shifts one from 10am to 1pm and then one from 2pm to 4pm). To do this, click "**Add Another Shift**" in the "**Add a shift**" window.

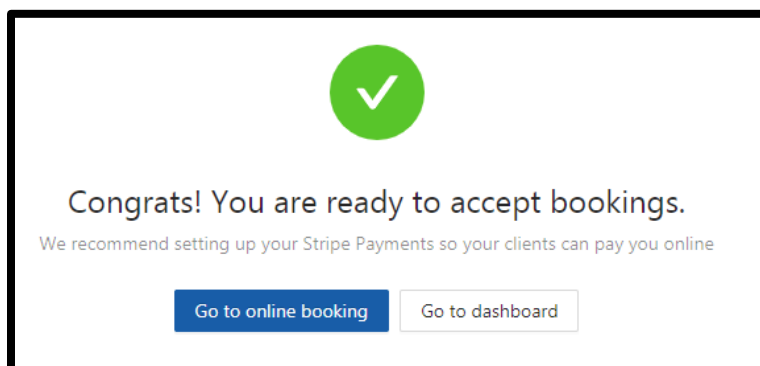
6. **Deleting Worktimes** - If you need to adjust the worktimes, you can click on the shift, click **Delete** and then choose to either delete this shift only or delete all upcoming shifts going forward for that day of the week i.e. if you clicked on a Wednesday shift it would then only delete Wednesday shifts moving forward and not all shifts every day of the week. To delete different days of the week you will need to click on each day of the week individually.
7. **Plan for statutory holidays** - be sure to go through your calendar of shifts you have setup and delete statutory holidays if you are closed on those dates. Or, if you have specific hours of operation during statutory holidays you need to ensure you adjust those worktimes for those dates before a patient makes a booking for that time slot.
8. Before launching your Online Booking Platform and sharing your booking link, we highly recommend creating some test time slots on days that you aren't taking bookings yet so that you can do a full test of your booking site. This will also allow you to see how it will appear to your patients. Refer to section **Test your booking site** section in this guide for more information on this.

**IMPORTANT NOTE:**

As noted above, if you change / delete work times it does not cancel appointments that were previously booked and that fall within these changed / deleted work times. If you want these bookings cancelled, you will need to go to **Scheduler** and cancel the appointments manually for each individual appointment.

Click on the **next** button on the top right to finish your Initial Setup.

- **Go to online booking** is to see it as a patient would.
  - After viewing the patient view, you can go back on your web browser and the choose Go to dashboard.
- **Go to dashboard** will bring you back to your Admin panel.



## STEP 2.1: Add Inventory (Premium Plan Users)

This feature is required for Premium Accounts, as we have linked your Flu Vaccination Service to a Flu Vaccine inventory product already.

This feature is not available for Standard Plan users.

[Settings](#) → [Products](#) → [view](#)

### Adding Inventory to a Service to limit bookings

1. By default, we have added a basic flu vaccine inventory item for you and have added it as an **Associated Product**.
2. Once there is a product associated to your service, appointments can only be booked when there is inventory added, so you must add inventory in order to start accepting appointments.
3. Inventory will deplete by one unit each time someone books that service (or two units if a two-appointment booking is made) and the stock replenishes automatically if an appointment is cancelled by either the patient or the pharmacy.
4. To increase inventory go to **Settings** → **Products** → **view**
5. Choose **Flu vaccine** → **edit**
6. **Type** → **Inventory Service**.
7. Update **Quantity** and click on **Submit**.

Linking Products to a Service.

8. To link a product to a service, go the **Settings** → **Service** and then select the service.
9. Scroll to the bottom of the screen and click on **Associated Products** → **Edit**
  - a. To associate a product to this service, select the product from the drop-down menu and click **Add**.
    - i. If the product is not listed yet, create the product first by going back out **Settings** → **Products**

## STEP 3: Test your booking site

### IMPORTANT NOTE:

After you setup your worktimes, you should test your Online Booking Platform thoroughly, and book “practice” appointments, before you share your booking link with patients to familiarize yourself with the system, both from the pharmacy-view and the patient-view. If you need to make adjustments after going live, you may need to reschedule multiple appointments manually, which may be time consuming and therefore not ideal.

### Online Booking

1. Click **Go to online booking page**.
  - a. You can access your booking link by clicking the **Online Booking** menu (the very last item under “Online Payments”).
    - Click **Copy booking link** under All services.
    - Open an incognito browser page by pressing CTRL+SHIFT+N on your keyboard and then paste the copied link to view your online booking site.

### IMPORTANT NOTE:

Be sure that you are logged out of your admin account before you start testing (it is best to use an incognito browser page as suggested above to make practice bookings so you do not have to keep logging out of the admin account). If you create a fake booking, logout of that profile before you make the next fake booking, etc.

2. Make sure the following are correct on your new booking site:
  - a. Services available are correct.
  - b. Time slots and short description are correct.
  - c. Logo on the top looks OK.
  - d. Address, phone, email and your website address at the bottom of the page.
  - e. Choose the service by clicking the **Book** button and then confirm the long description is correct. Do this for each service if you have multiple services listed.
  - f. The name of the pharmacist is displayed correctly.
3. Make some practice bookings as if you are a patient. Fill up the test time slots that you setup.
  - a. An email is sent right away to the “fake patient” as well as to your pharmacy.
    - i. So, we recommend testing some with your own personal email address/addresses so you know what experience your patients will have (do not use your pharmacy’s email address) and also



make some additional bookings by creating fake email addresses ending with **@bcpha.ca** as that is the domain for the BC Pharmacy Association and no one will actually receive the confirmation email but it will give you a chance to do more testing particularly so you can see how the **Scheduler** section of your Admin portal works.

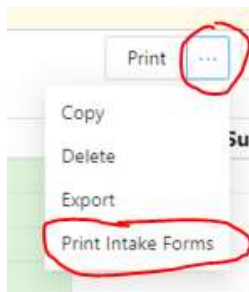
- b. A text message is sent 24-hrs before the appointment (if your Online Booking Platform subscription has SMS activated, so please also be mindful if you intend to put a phone number, we recommend using a fake phone number e.g. 7777777777 so it doesn't actually go anywhere.) You can also test some practice bookings with a real phone number as well if you would like to see what the SMS looks like. Remember, SMS is only sent 24-hrs before the appointment and not immediately by default.
4. Fill in the vaccine form for some of the test bookings plus skip the vaccine forms for some of the test bookings.
5. Fill in the COVID-19 pre-screening forms for appointments coming up in 24-hours.
6. Read your sample email that is sent to your admin account.
7. For more detailed information please refer to the Full Step-by-Step Guide

## You are all setup to take appointments!

1. Once you are ready to take appointments, from the Admin panel and go to **Online Booking** and copy the link to post on your website or social media channel.
2. Put up a poster to inform patients to go to your website to book online.
3. Update your voice attendant to direct patients to book online.

## Clinic day

1. Print daily appointments. Go to your **Scheduler** → **All Staff** → **Day** → **Print**
2. Print all consent forms. Choose the **three dots** beside **Print** → **Print Intake Forms**.



## Reminders and cancelling

1. Email notifications are sent automatically to patients immediately upon booking and also a day before their appointment.
  - a. Premium account subscribers, your patients will also receive an SMS confirmation a day before their appointment as well automatically.
2. Patients can cancel anytime and details are included in their email confirmations. You can also cancel through from the admin panel as well.
3. For patients that do not show up, you will need to mark them as No Shows, by going to

## Getting Help

Do you have additional questions about how to use your Online Booking Platform? Please feel free to email us at [info@bcpharmacy.ca](mailto:info@bcpharmacy.ca). We would be happy to help with any questions you have.