



British Columbia
Pharmacy Association

Step-By-Step Guide



TELEHIPPO

Setting Up Online Booking For Your Pharmacy

This guide was specifically developed by the BCPhA to support BC pharmacies.

This guide is meant to make things a bit easier.

Spend 30-minutes and go through this document as you setup. It will be worth it in the long run.

This system will not solve everything, but it will take care of online booking, notifications, COVID-19 pre-screening and vaccine screening. You will still get calls, but, you'll notice 40-70% of the appointments will happen on their own, those are all calls you avoided. People will show up late or even early.

There is a learning curve in getting used to a new system, so be patient and very soon you'll be an expert!

IMPORTANT NOTE:

If you are experiencing any issues you cannot resolve, it might not be you. Contact us at info@bcpharmacy.ca and we can look into it.

Important system requirements

There is no software to download, everything is accessed through a web browser. It's that easy.

There are some **basic but important requirements**:

1. Admin features and setup should only be done on a computer. Avoid mobile devices for setup at all cost. A tablet can work, but again, not as good as using a computer. Mobile and tablet are more for the patient's booking experience and you can also use it as reference in the pharmacy as well.
2. You will need to use either Chrome or Safari web browser. Other browsers are not fully supported. Please also ensure you have the latest updates installed.
3. You can log in from a computer, tablet or smartphone. You can have more than one session at a time, but we recommend that if two people are logged in at the same time only one should be making edits such as booking an appointment or filling in a form to avoid double booking or over-writing edits to a form if both are completing the same patient form at the same time.
4. You need internet access to run this application.

Contents

Important system requirements.....	3
STEP 1: Account access and shortcuts	6
STEP 2: Setting up your pharmacy	7
Settings → Initial Setup.....	7
Services	9
Settings → Services	9
Adding Additional Services	9
Waitlist setup options	10
Online Forms.....	11
Two appointment booking feature	12
Age eligibility booking criteria.....	12
Cancellations Reporting	12
Access your Waitlists.....	13
Linking Inventory to a Service to limit bookings	14
Adding Staff.....	14
Settings → Staff	14
Worktime (appointment time slots)	14
Settings → Worktime.....	14
STEP 3: Test your booking site	18
Online Booking.....	18
STEP 4: Pharmacists dashboard	20
Scheduler View	20
Printing your daily schedule.....	20
Review patient booking details and screen form status.....	21
Viewing, Printing and Saving COVID-19 and Vaccine Forms.....	22
Reminding Patients to complete their screening forms	23
Booking Status	24
Adding appointments from the backend.....	25
Adding an appointment for an individual with an email address.....	25
Adding an appointment for a family with only one email address.....	25
Adding an appointment for someone without email	27
Cancellations and cancellations reporting.....	29

Clients menu – Finding a patient’s appointment.....	32
Setting menu.....	33
Booking site links	35
Block Upcoming Booking Times.....	35
Booking site custom message block	35
Managing multiple license	36
Go to Settings → Staff	36
Two more steps so your second staff profile will work:.....	37
STEP 5: START MARKETING.....	38
Online Booking.....	38
STEP 5: MONITOR APPOINTMENTS AND GET FEEDBACK.....	39
STEP 6: DAILY TASKS.....	40
Getting Help.....	40

STEP 1: Account access and shortcuts

Your account setup email should have include the following:

1. This setup guide.
 - a. Read it at the same time as you are setting up.
 - b. Share it with those who will be responsible in setting up work hours, booking slots and workflow planning.
2. Link to the admin portal.
 - a. Save this link to your bookmarks and create as a shortcut on all the devices you will be using this to access your admin portal. You will need this link often: <https://b.telehippo.com/r/login>
3. Your vendor ID.
 - a. You will need this when signing in each time. You can also click on "Remember Me" on the log in page to save the vendor ID.
4. Confirmation of your email.
 - a. Email used to login to system.
 - b. All booking email notifications are sent here.
 - c. This is your login email and location of email notifications about bookings. If this is not correct, you will need to go to **Settings --> Staff --> Pharmacist 1 --> Edit -->Email**. This will impact both your log in and where your internal notifications will go. You can turn off notifications for all bookings/cancellations as well, refer to the Table of Contents for page number.
5. Password reset link.
 - a. Use this link to setup your new password. You will get an email that acts as an email verification process as well as to setup your new password.
 - b. We recommend changing your password for added security. Go ahead and reset your password now:
https://b.telehippo.com/r/forgot_password
6. After you reset your password, it is time to do the Initial setup. Log in to the admin portal, then go to **Settings → Initial Setup**

STEP 2: Setting up your pharmacy

You reset your password, and now are logged in on the setup screen.

[Settings](#) → [Initial Setup](#)

Info

1 Info — 2 Service — 3 Staff — 4 Worktime

Company Information

Let clients to find and contact you. [next](#)

Company Name:

Currency:

Timezone:

Advanced (Optional)

- > Customer Support
- > Address (For retail locations)
- > Branding
- ▼ Scheduler Settings

The following will affect how appointments show up in the scheduler.

Scheduler Start Time:

1. Company name

- Show up on your booking page
- Auto-populated on the vaccine screening form (and other future custom forms)

- c. Used in automated email and SMS texts.
- 2. **Currency**
 - a. Needs to be selected, but will not impact you if you do not plan to collect payment for services through this application.
- 3. **Time zone:** America/Vancouver (this is locked, if this is incorrect, please contact info@bcpharmacy.ca before launching your tool as this will impact your booking slots)
- 4. **Advanced (Optional).**
 - a. This is an important section, not really optional in our opinion. Click on **Advanced (Optional)** to bring up more important menu items.
- 5. **Customer Support**
 - a. Information will show up at the bottom of your booking page.
 - b. The 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 log in account email.
- 6. **Address (For retail locations)**
 - a. Information will show up at the bottom of your booking page.
 - b. **This address will automatically show up in your automated email and SMS texts to patients.**
- 7. **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.
 - c. Images accepted include JPG.
- 8. **Scheduler Settings**
 - a. Controls the size of the calendar patients will see.
 - b. Does not control booking time slots available to patients.

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.

Services

After the initial setup, you can always return to this area by going to:

Settings → Services

By default, we have included one service as an example for you:

Flu Vaccination

1. The service is current not Online for booking if you would like to offer this service, you need to click on **edit** and **turn on Online booking**.

Adding Additional Services

You can feel free to add as many services you like at no cost. Click on **Add** when you are in the **Settings → Services** area.

1. Click on **Advanced (optional)** to open up all the options.
2. **Service Name** – create the name of your service to show up for patients at what will be included in the email and SMS reminders.
3. **Duration (mins).**
 - a. Duration at 15-minutes
 - i. 15-minute slots x 8 hour day = 32 slots/day, or 224 slots/week.
 - ii. Improves chance of smooth patient flow, and better opportunity to fit minimal walk-in patients.
 - iii. If you allow for limited walk-ins, you will need ample waiting space or front shop to avoid crowding.
 - iv. Limited walk-ins can fill no shows or cancellations and also fit in between gaps of patients show up early or arrive late but require a bit more juggling.
 - b. 10-minutes is the minimum recommended time frame.
 - i. 10-minute slots x 8 hour day = 48 slots/day, or 336 slots/week.
 - ii. Good option if you have ample waiting area and also pharmacy assistant or technician assisting with receiving and preparing patient.
 - iii. If you have too many time slots and people are late or early, you increase the chances of crowding.
 - c. Concurrent appointments or 5-minute intervals not available with a single license.
 - i. 5-minute slots x 8 hour day = 96 slots/day, or 672 slots/week.
 - ii. Please contact vince.lee@bcpharmacy.ca if you are interested in adding a second license in order to handle more timeslots per hour.

4. **Price**

- a. If you have services that are paid you can include pricing here. Otherwise, please keep at \$0 for publicly funded services.
- b. If you are looking to setup online payment, you will need to setup your own Stripe account first and link it to this system to start collecting online payments directly through your online booking tool (Go to Settings → Online Payments to **Connect with Stripe**).

5. **Calendar Color**

- a. This controls how you view your appointment bookings in the **Scheduler**. Assigning a difference color for each service will give you a quick reference in the Scheduler of the type of appointments you have coming up.

Waitlist setup options

6. **Online Booking**

- a. Turning this on will make the service visible in the online booking calendar.
- b. Services also need to be Associated with a Staff and also requires Worktimes created first before it shows up on your booking site. You will get to these steps in the upcoming pages of this guide.

7. **Booking Method**

- a. **Online Booking** makes the service available for booking online.
- b. **Call to Book** does not allow for online booking but instead creates a quick call button for mobile phones to dial your pharmacy's phone number to make an appointment.
- c. **Online Booking with Stripe** for services that require online payment.
- d. **Must have pre-authorized credit card to book online** this option requires connection to Stripe.
- e. **Waitlist** if you want to create a waitlist for a service (requires a Premium plan). If you turn this on, you will receive an email notification each time someone joins the waitlist. This feature is to collect a running waitlist even if you happen to have other services that are accepting appointments. For example, you might have COVID-19 vaccination slots available but for those not yet eligible or cannot find a timeslot that fits their schedule, they can join this waitlist.
- f. **Waitlist with birthday** also collects birthday with the waitlist questions and ideal for services that have age eligibility criteria requirements.

8. **Out of Stock Mode**

- a. This function requires a Premium account.
- b. In order to use this function, you need to link inventory/products to the service for this feature to work (see bullet #6 in this section below on creating and linking inventory).
- c. Once the linked inventory/product is out of stock, this service will automatically convert to waitlist mode.

Important note on waitlists: If you have setup a running waitlist service, you should not turn on the waitlist with the Out of Stock Mode as well. If you do, you will have two waitlists that you will need to download and manage. Choose one only. If you leave Out of Stock Mode to None, and have inventory linked, the patient will simply be prompted that there are no more appointment timeslots at this time for this service and would still limit bookings based on the inventory you have linked.

9. **Rank, license, cancellation, no-show, short and long descriptions, etc.**
 - a. See on screen details for these, all self-explanatory.

Online Forms

10. Survey URL

- a. If you would like to link an external form or PDF that you have posted on your website with the confirmation email, please include a link here. We only recommend using this option if the system forms below do not meet your needs of this service.

11. Pre-screening before booking

- a. This feature turned on means that the patient needs to complete this task before they can even see the appointment slots. This will show up as a pop-up question after they select this service to book and if they fail it they cannot book, if they pass they can proceed to choose a timeslot to book.
 - i. Not required
 - ii. COVID-19 symptom checker before booking
 - iii. COVID-19 vaccination, no other vaccinations 14 days before the appointment.

12. COVID-19 pre-screen within 24hrs

- a. If you set as Required for completion, the patient can make the appointment as per usual but will be prompted when they receive their email and SMS reminder a day before the appointment to complete the COVID-19 symptom checker before attending the appointment.

13. Require Vaccine Screening

- a. If you wish to activate any of the screening forms as part of the booking process, you need to switch this to Required.
- b. Once turned on, the patient will see the screening questions immediately after they setup an appointment. We see that around 80% of patients will complete this form online immediately after when turned on.
- c. You can access and view the status and the actual details of these forms when you are in the **Scheduler** view and click on the patient's appointment and then click on the "pass/completed/failed" box and the form will show up. You can edit the *Pharmacist Internal Use* section

digitally as well if you choose. You can also print these forms as PDF to your computer as well.

14. **Vaccine Screening**

- a. No intake form – means no form is required
- b. BCPHA Flu Screening form
- c. BCPHA Flu Intranasal Screening form
- d. General Vaccine Screening form

Two appointment booking feature

15. **No. of appts required.**

- a. This is the two appointment booking feature.
- b. Set it to 2 if you require patients to book two appointments at a time
- c. **Min days between appts** – sets minimum range for second appointment
- d. **Max days between appts** – sets maximum range for second appointment

Age eligibility booking criteria

16. **Min age and Max age. Age eligibility criteria feature.**

- a. For services such as COVID-19 vaccinations which will have moving age eligibility, you can use this feature to allow only those within a specific age range to make an appointment.
- b. Patient will need to pass this criteria before they can even make a booking.
- c. As seen with other provinces, the criteria is based on birth year, not the actual date of birth which includes month and day.
- d. Leave blank if you do not need this function.
- e. For max age, please note the oldest Canadian is about 117, so if you are accepting 70+ for example, you would set the min to 70 and max at 120.

17. Click on **Save** at the end to apply all changes. DO NOT just click outside of the window, your window will disappear and changes will not be saved.

Cancellations Reporting

If you cancelled any appointments for this service or if you patients cancelled their appointments, you will be notified by email immediately. If you wish to see a detailed report on cancellations of a service, you can download a cancellation report in Settings → Services → select the service and then click on the **Cancellations** button (see example on next page). This button will on show up if you have cancellations associated with this service. This report is available as a .CSV file for export.

Example of the Cancellations report export by service option.

COVID-19 Vaccination (DEMO ONLY)

Add ▾

Rating: --

No. Ratings: 0

Details

Waitlist (15) Cancellations edit ...

Name: COVID-19 Vaccination (DEMO ONLY) [appointment](#)

Duration: 10 mins

Calendar Color: ■

Access your Waitlists

1. The **Waitlist button** can also be seen in the above image. This button also will only show up if you have someone fill out the waitlist.
2. You will also receive an email notification each time someone fills out the waitlist.
3. You need to go into each service that has the Waitlist turned on in order to access the individual waitlist.
4. **Calling patients.**
 - i. If you plan to make phone calls to patients to manually book them into available time slots, the default view will give you all the information you need.
 - ii. After booking the person, come back to this screen and click on **Remove** to take them off the list.
5. **Mass email to patients on waitlist.**
 - iii. Use the **Export to CSV** function. This function is for you to export the list as an excel file in order to do a mass email blast from your own email system. Email everyone on the list either by integrating into your existing email system or you can send a bulk email to everyone with the BCC field. **DO NOT send a bulk email where you include everyone's email in the To field or Cc field of the email.**
 - iv. You do not have permission to send other marketing information for other services. Please refer to [Canada's Anti-Spam Legislation](#).
 - v. You can only send emails relevant to this service appointment waitlist they have joined once you have more appointment time slots available.
 - vi. The file includes the name, email and date of birth.
 - vii. In your mass email to patients:
 - be sure to include a link to your booking site

- name of service/waitlist they have joined
 - your business information
 - appointments may be limited and offered on a first come first served basis
 - they will now be removed from the waitlist and if they are not able to make a booking to be sure to join the waitlist again to be notified of any future appointments.
- viii. Save this file on your computer for future reference.
 - ix. After sending the mass email, you can come back to the waitlist and click on **Empty waitlist** to clear it out to start fresh.

Linking Inventory to a Service to limit bookings

Associated Products → Edit

- b. For Premium plan subscribers, you need to link inventory to the service for it to start tracking.
- c. To do this, go the Settings → Service and then select the service.
- d. Scroll to the bottom of the screen and click on **Associated Products → Edit**
- e. Now link the inventory to the service. You'll need to create Products under **Settings → Products** first.

Adding Staff

After the initial setup, you can always return to this area by going to:

Settings → Staff

By default one staff accounted will already be created just as Pharmacist 1.

Nothing needs to be touched here unless you need to add a second license.

There is a \$15/month fee per additional license. Contact vince.lee@bcpharmacy.ca to setup additional licenses.

If you have multiple licenses, please refer to the table of contents to go to the section on managing multiple licenses.

Worktime (appointment time slots)

After the initial setup, you can always return to this area by going to:

Settings → Worktime

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 and allow for too many time slots for patients to book, you will have a lot of work in cancelling and rescheduling.

This is the time for you to consider how you want to manage your work flow and patients by setting specific times for appointments, rather than just opening up booking all day long every single day.

For vaccines with short expiry dates you may need to add inventory to start taking appointments earlier than when they arrive. Supply may vary than what is promised do to unexpected factors (spoiled vaccines before arrival), so be sure to offer less appointments than supply promised. You can adjust the inventory after you receive your vaccines as well to allow for more time slots. You do not want to get in the situation where you accidentally overbook due to less supply arriving than promised or expected.

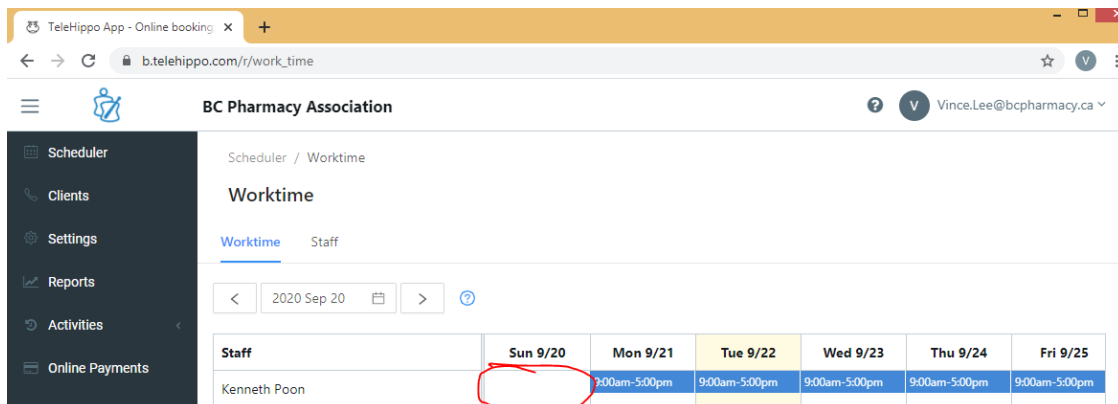
Other items to consider before you setup this service.

1. How many people do you want to show up in given hour for vaccinations?
2. Will you be offering vaccinations only for specific hours in the day?
3. When do you want to block out times for appointments? Certain time before closing? Busy periods?
4. Will you only offer services on certain days?

Adding Shifts (time slots)

You can also adjust worktimes in the pharmacist dashboard under **Settings → Worktime**.

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



2. **Repeated weekly until specific date.** You can choose **Repeat** to auto-populate multiple weeks/months at once. Do not use the repeat weekly forever function, it will likely result in you needing to make a lot of cancellations in the future and will also be confusing if patients accidentally book an appointment for the wrong year.
 - a. If you need to edit a time slot just click on the time and the "Add a shift" window will open again, make your changes and then click Save.
 - b. We recommend that upon initial launch of your booking tool to only take appointments for the first 2-4 weeks to test it out.
3. If you have a block of time you do not take 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). In order to do this click on "**Add Another Shift**" in the "**Add a shift**" window.
4. We also recommend creating some test dates where you aren't actually taking bookings so that you can do a full test of your booking site as well before launch.
5. **Shift notes:** will show up on the pop-up right before the patient makes the booking. We recommend you add a note about COVID-19 pre-screening there as well.

Deleting Worktimes

6. If you need to adjust the worktimes, you can choose the shift, choose Delete and then choose to either delete this shift only or delete all upcoming shifts going forward for that day of the week.

IMPORTANT NOTE:

If you delete work times it does not cancel appointments that were previously confirmed. You will still need to manually go in and cancel the appointments in the Scheduler manually for each appointment.

Plan for stat holidays

7. Be sure to go through your calendar of shifts you have setup and delete stat holidays if you are closed on those dates.
8. Or, if you have specific hours of stat holidays you need to ensure you adjust those worktimes for those dates before someone makes a booking for that time slot.



Congrats! You are ready to accept bookings.

We recommend setting up your Stripe Payments so your clients can pay you online

[Go to online booking](#)

[Go to dashboard](#)

STEP 3: Test your booking site

IMPORTANT NOTE:

Test your waitlists if you have any setup.

Also after you setup your worktimes, you should do lots of testing before you share your booking page with patients to you are familiar. Once you go live and want to make adjustments you will simply need to reschedule everyone manually, so it's not ideal.

Online Booking

1. Click on **Go to online booking**.
 - a. You can also access your booking link by going to the Admin portal and clicking on the **Online Booking** section. You can **Copy booking link** for your online site that lists all the services or you can copy a link for a specific service as well. Paste the copied link into a new browser to view your online booking site.

IMPORTANT NOTE:

Be sure that you logout as an admin before you start testing. And if you create a fake booking, logout of that profile first, before you make the next booking, etc.

2. Make sure these things are correct on your new booking site:
 - a. Services available are correct.
 - b. Time slot and short description are correct.
 - c. Logo on the top
 - d. Address, phone, email and your website address at the bottom of the page.
 - e. Choose the service by clicking **Book** and then confirm the long description is correct.
 - f. The name of the pharmacist is what you want it to be displayed as correctly.
3. Make booking as if you are a patient! Fill up the test dates that you set up!
 - a. Note an email is sent right away to the "patient" as well as to your pharmacy. So we recommend for testing some with your own person email address/addresses not your pharmacy email and also making additional bookings and creating a fake email address ending with **@bcpha.ca** as that is our domain and no one will actually get the email but gives you a chance to do more testing particularly so you can see how the **Scheduler** portion of your Admin portal works.
 - b. Note a text message is also sent 24-hrs before the appointment as well, so please also be mindful if you intend to put a fake phone number, we

recommend using 6041234567 as a phone number so it doesn't actually go anywhere. You can also test some with a real phone number as well if you like to see how the SMS looks like. Remember, SMS is only sent 24-hrs before the appointment, not immediately by default.

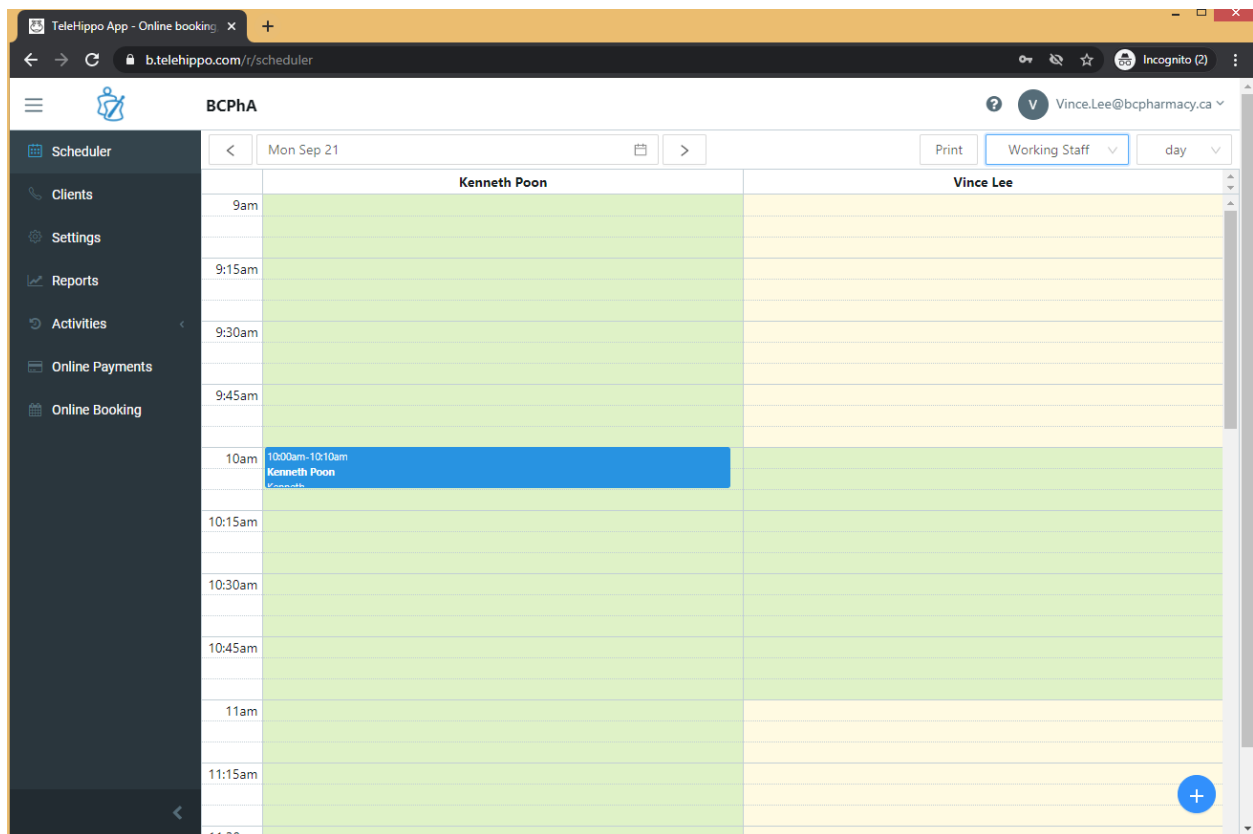
4. Fill in the vaccine form for some of the test bookings
5. Skip the vaccine forms for some of the test bookings
6. Fill in the COVID-19 pre-screening forms for appointments coming up in 24-hours.
7. Read your sample email that is sent to your admin account.
8. Once you are done, you are ready to test the **Scheduler** and other admin features of this booking tool.

STEP 4: Pharmacists dashboard

Log in to the admin page again if you are not already there:

<https://b.telehippo.com/r/login>

Scheduler View



Default view

1. This is your default screen when you log in.
2. It is set to **All Staff** and on **day** view.
3. You can also view in **weekly** view or **working staff** if you decide to also setup consultation rooms for the service and organize in that level of detail as well.
4. You can also toggle through your calendar with the arrows or drop-down icon.

Printing your daily schedule

1. In the **Scheduler** on **day** view, you can click on the **Print button** to print out a PDF or on paper of everyone scheduled for the current day. If you want to print other days, you need to toggle to that day and then click on **Print**. But

understand that if someone books real-time, you would have that in front of you so you'll need to make sure to note that.

- a. **PRINTING** – Some browsers will not print the information on a letter sized paper by default. In that case, you need to choose in your printer settings to select **letter sized paper** and also to **shrink to fit page**.

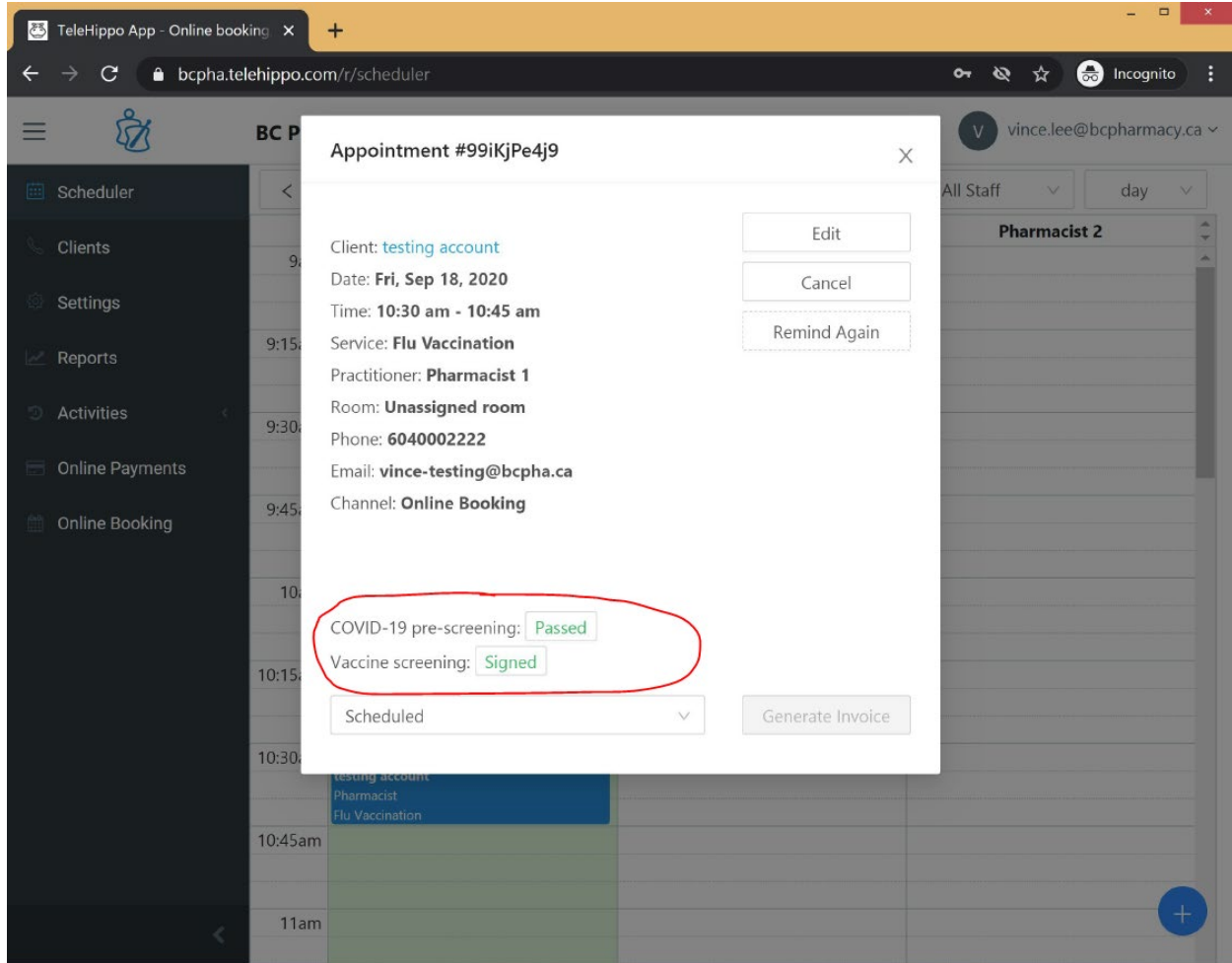
Time	Provider	Screening Status
9:00am-9:10am	Gio Dior Flu Mist - Kenneth Poon	COVID-19 pre-screening: Did not complete vaccine screening: Signed
9:10am-9:20am	Gio Dior Flu Mist - Kenneth Poon	COVID-19 pre-screening: Did not complete vaccine screening: Did not complete
9:20am-9:30am	kenneth Poon Flu Mist - Kenneth Poon	COVID-19 pre-screening: Did not complete vaccine screening: Did not complete
9:30am-9:40am	kenneth Poon Flu Mist - Kenneth Poon	COVID-19 pre-screening: Did not complete vaccine screening: Signed
9:40am-9:50am	Gio Dior Flu Mist - Kenneth Poon	COVID-19 pre-screening: Did not complete vaccine screening: Signed

Review patient booking details and screen form status

There are two ways to review a patient's booking.

1. In **Scheduler** view, find the person and click on their booking slot.
2. In **Clients** menu, Search for the person by name, email, phone number. Then click on the person you are looking for.

Once you open their appointment, you will see this screen:

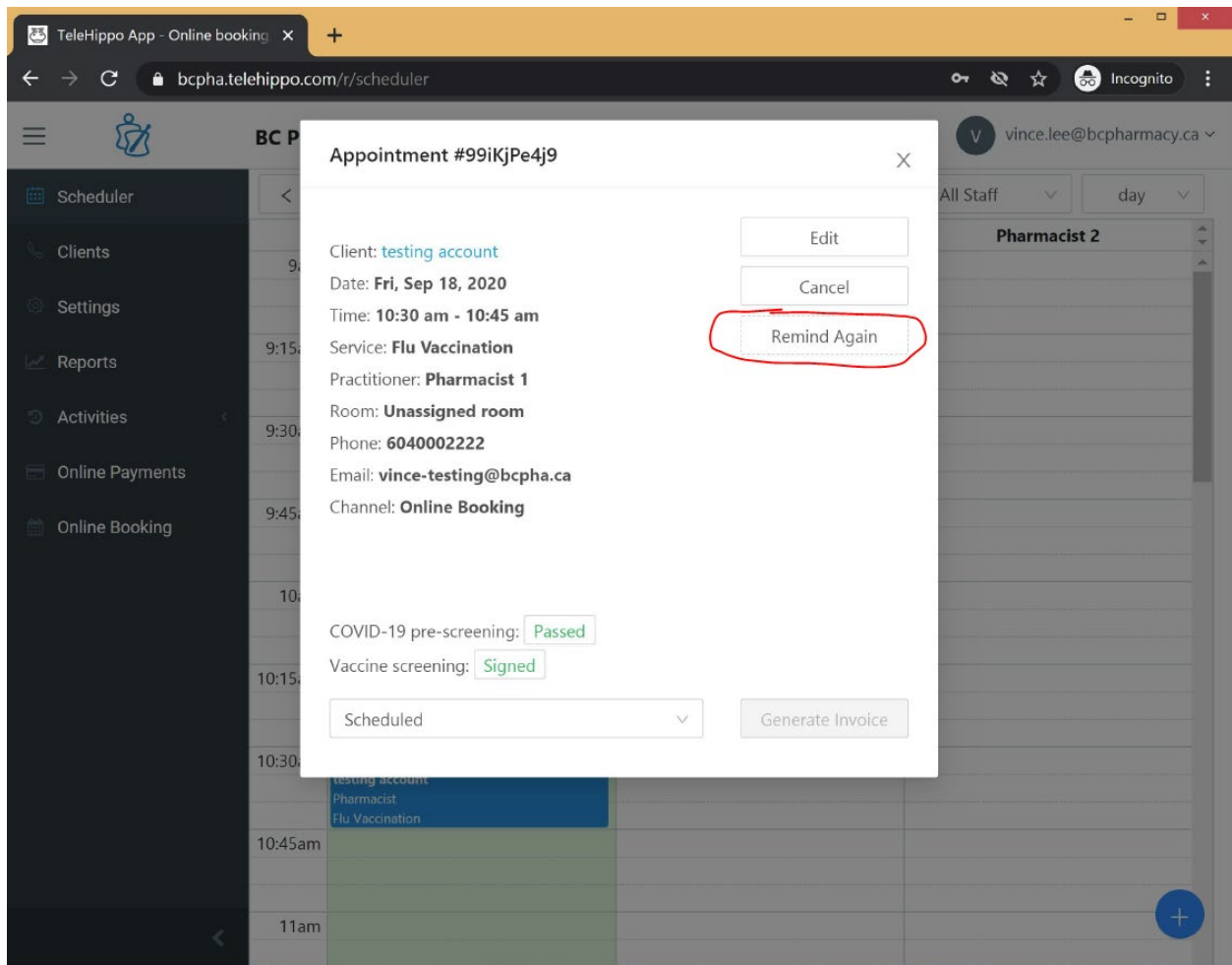


3. Click on the screening form "Passed" or "Did not complete" box to bring up each screening form.

Viewing, Printing and Saving COVID-19 and Vaccine Forms

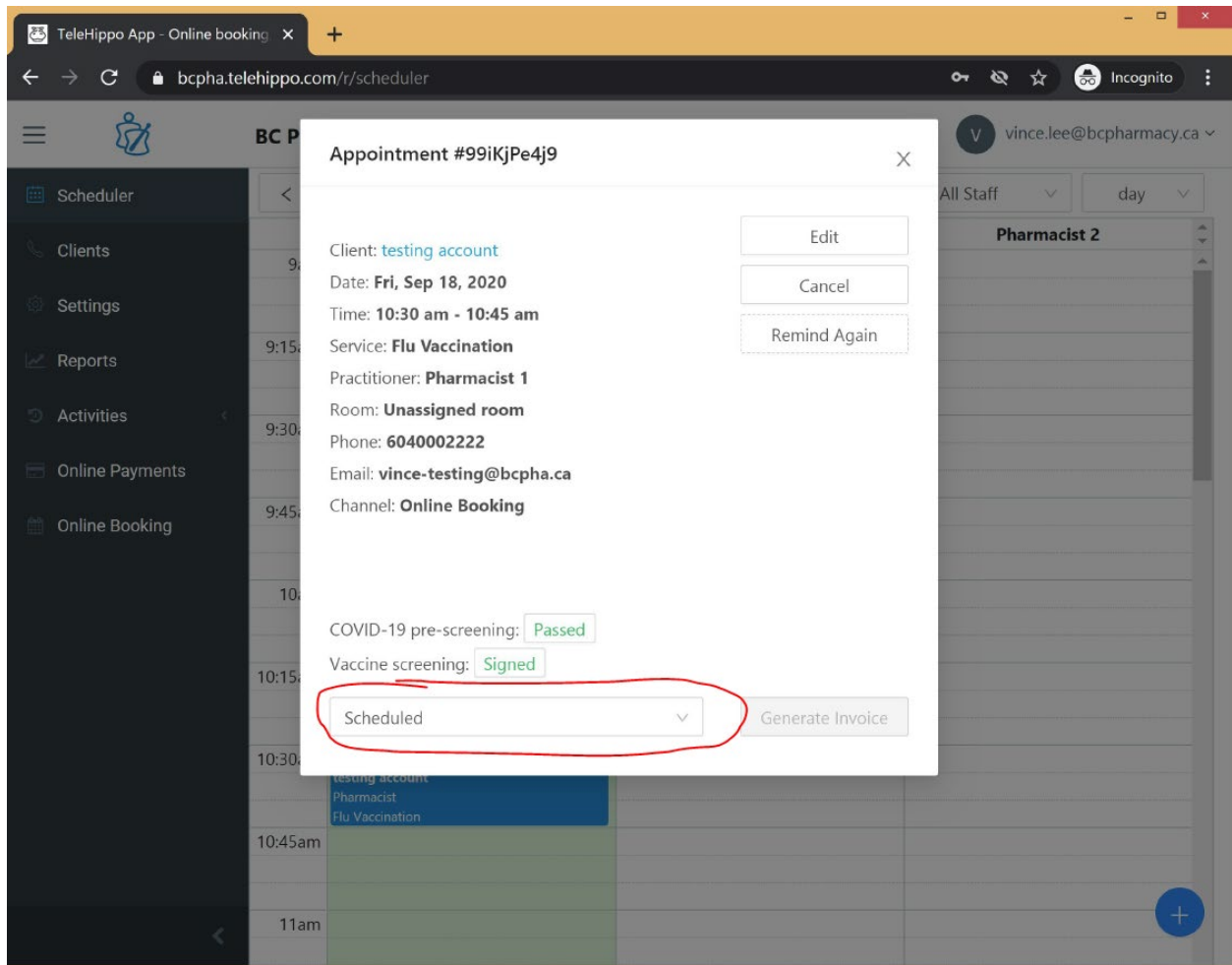
4. After click on "Passed", "Signed", "Did not complete", "Failed" you will see the actual form onscreen.
5. You can **Print** the form as a PDF here.
6. You can also **Edit Vaccine Info** and enter the "internal use" fields of the form here. Once you fill in the form, save changes and your notes will be included into the form. This is an optional feature, so pharmacies simply print and manually fill in with the patient as well for their records.
7. Some pharmacies may choose to print all the forms in the morning and then have the forms available for the appointments and then manually write in the details.

Reminding Patients to complete their screening forms



1. By default, the patient will be directed to the screening forms immediately after they book an appointment.
2. They will also receive an email and SMS text notifications automatically 24-hours before the appointment.
3. If you notice they have not completed both the morning of the appointment, open the individual patient's booking and open the form (see instructions on previous page) and click on **Remind Again**.
 - a. Choose **Notify by Email** or **Notify by SMS**. Please note that there is a maximum of 300 SMS per month per license. It will cost an extra \$15/month for any overage and you will have access to an additional 300 SMS for that month.

Booking Status



After a booking has been made, the appointment is noted as **Scheduled**.

This is an optional feature to track if someone called to confirm their appointment if you wish to take that extra step above and beyond the screening forms.

You can also track **Confirmed, Arrived, No Show**.

Adding appointments from the backend

Adding an appointment for an individual with an email address

1. There are a two ways in **Scheduler** view to add appointments:
 - a. Click on the specific time slot that is blank and ensure that a staff person is actually working that time (green in the calendar means that person is working, yellow means that are not scheduled for that time slot).
 - b. You can either click on the + button the bottom right corner.
2. Fill in all the details on screen. You will likely need to **Add New Client** as well.
 - a. You only need to collect information from the first tab called **Basics** and leave the other tabs blank.
3. **Add the appointment** once all details are completed.
4. Find the booking and open it.
5. Click on **Remind** and then send then **Notify by Email**.
6. When speaking to the patient, let them know:
 - a. To expect an email to complete the vaccine screening form.
 - b. They will also need to use the **Forgot password** feature to setup their password.
 - c. They will need to complete the COVID-19 screening form 24-hrs before their appointment and will receive an email and SMS reminder as well.

Adding an appointment for a family with only one email address

1. **Booking on behalf:** If they have a family member who is also booking an appointment who does have email or phone, that person can book for them with the same account.
 - a. **Choose a booking slot and you will see two options:**

The screenshot shows a web interface for adding an appointment. At the top, there are two tabs: 'add an appointment' (which is selected and underlined) and 'add a break'. A close button 'X' is in the top right corner. Below the tabs is a search bar with the placeholder text 'Type to search client...'. To the left of the search bar is the label 'Name:'. Below the search bar is a blue button labeled 'Add New Client'. Below this is a radio button selection for '* For who?': the first option is 'For the client himself/herself' (unselected), and the second is 'For someone else (ex. family member guardian, representative)' (selected). Below the radio buttons are two text input fields: '* First Name:' with the placeholder 'First name (for someone else)' and '* Last Name:' with the placeholder 'Last name (for someone else)'.

- b. Each appointment will have their own screening forms.
- c. After it is booked, it shows a booking for someone else tag
- d. The booking modal will show the person's name. E.g., Peter Pan (Booked by...)

Appointment #uJOdsPeabT

Booking for someone else

outstanding cancellation fee apple orange

Client: peter pan (Booked by kenneth Poon)

Date: Sun, Oct 18 2020

Time: 09:15am - 09:30am

Service: Flu shot

Practitioner: Cindy Thue

Room: Unassigned Room

Phone: 6048680058

Email: clevre.developer@gmail.com

Channel: Online Booking

Client Rating: --

COVID-19 pre-screening: Did not complete

Vaccine screening:
 Did not pass age qualification. Pharmacists
 can only administer injectable vaccines to
 patients 5 years and older

Scheduled

Generate Invoice

Edit

Cancel

Remind Again

2. Pharmacists can see the (Booking for someone else) text in the scheduler

ization + Telehippo Software Inc. ? E ellie v

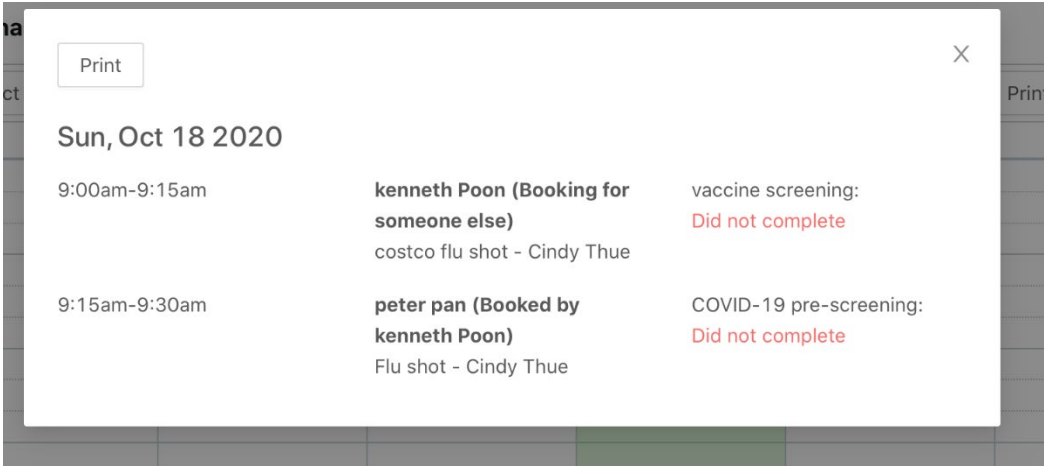
Print Working Staff day

	Yuki Moji	wewe ewwew
9:00am-9:15am	Kenneth Poon (Booking for someone else) Yuki Flu shot	
9:15am-9:30am	Kenneth Poon (Booking for someone else) Yuki Flu shot	

- a. Clicking on it will also show a blue tag saying "booking for someone else". Pharmacist can click on the consent form to see the details. The client info in this modal will still be info of the person who books it. But the consent form will be whatever the client filled. If the patient filled in

the wrong information, you cannot edit this online on their behalf for compliance reasons, so you will need to print the form and add manual edits on the paper copy.

b. Print form will also show "booking for someone else" message.



Adding an appointment for someone without email

If a patient does not have an email, they are not able to complete the online forms. You can however still have them setup in the booking calendar manual (refer to the table of contents and see steps on setting up appointment section of this guide).

The major difference is that for the email address, we recommending creating a fake email address ending with **@bcpha.ca** then add a note that the patient does not have email or text messaging.

Appointment #nxuRbsz2Of ✕

Client: [Mike No](#) Edit

Date: **Wed, Sep 23, 2020** Cancel

Time: **09:30 am - 09:45 am** Remind

Service: **Flu Vaccination**

Practitioner: **Pharmacist 4**

Room: **Unassigned room**

Email: fake11111@bcpha.ca

Note: Patient does not have an email address or text messaging. Please call patient at 604-123-4567 to pre-screen in the morning on pre-screen onsite.

Booked by: **Pharmacist 1**

Client Rating: --

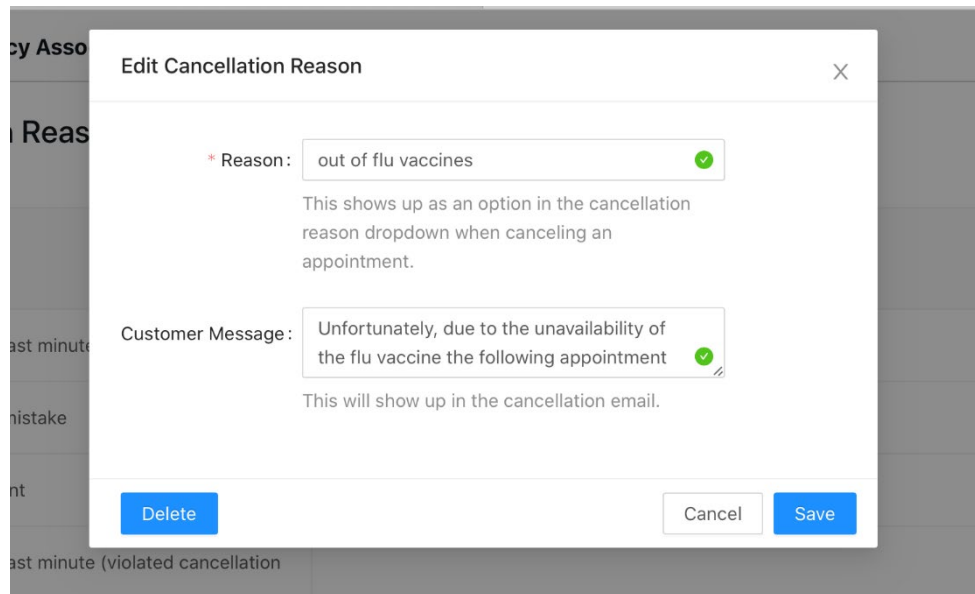
COVID-19 pre-screening: Did not complete

Vaccine screening: Did not complete

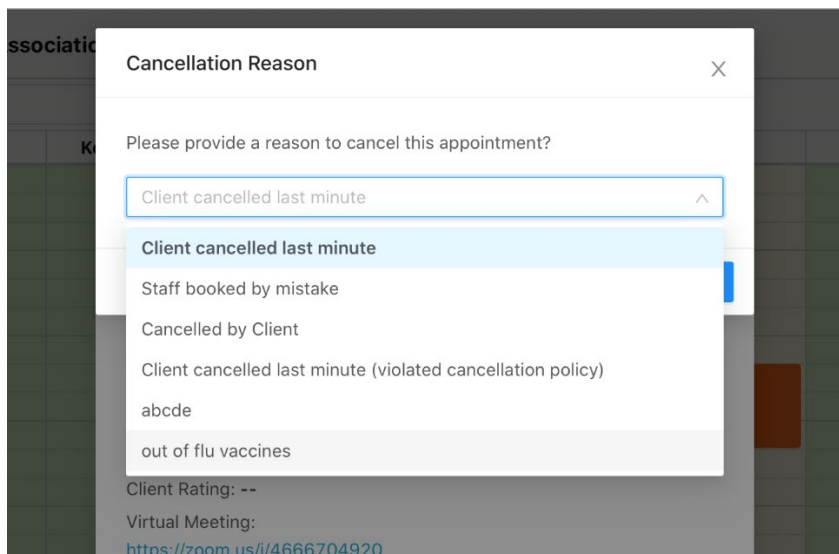
Scheduled Generate Invoice

Cancellations and cancellations reporting

1. Patients can cancel appointments themselves and you will receive an email notification if that happens.
2. If they call you to cancel, you can search for their appointment either in the **Scheduler** menu to find them and open their appointment and click on **Cancel** or going to the **Clients** menu and searching using the search tool
 - a. Open their appointment and choose **Cancel** and select the cancellation reason.
 - i. To add a cancellation reason and custom message to patients, go to **Settings** → **Cancellation Reasons** → **Add New Reason**.



3. When you cancel an appointment this pop-up will show up:



4. Then you can choose either to send out an email, SMS, or to not notify.

SAMPLE OF EMAIL

Dear [name],

[Customer Message]

Appointment: [Service name]

Start Time: [Date and time of appointment]

We offer you our sincere apologies for the inconvenience this has caused.

Please call the pharmacy back or visit <https://b.telehippo.com/o/bcpha> if you wish to check for availability and to make another appointment in the future.

Thank you for using our online booking service. Look forward to seeing you again in the near future.

Sincerely,

[Your business name]

Tel: [Your phone]

[Your address]

Booking by [BCPhA + TeleHippo](#)

Cancellations Report

You can view general cancellations data in the **Activities** section of the Pharmacist Dashboard.

If the appointment was cancelled by the pharmacy, choose **Activities → Staff**. Type “deleted” in the search box to show cancelled appointments by staff.

If cancelled by the patient choose **Activities → Clients**. Type “cancelled” in the search box to show cancelled appointments by patients.

FULL REPORT: Go to **Settings → Services** and select the Service. Then click on the **Cancellations** button. You can view and export all the cancellations data for that specific service including email addresses if needed.

You can view the waitlist here and then also export the waitlist as a .csv file. You can open that file in Excel and then use that list to email everyone on the list either by integrating into your existing email system or you can send a bulk email to everyone with the BCC field. **DO NOT send a bulk email where you include everyone’s email in the To field or Cc field of the email.**

You only have permission to email these individuals about the specific service they have joined for the waitlist.

You do not have permission to send other marketing information for other services. Please refer to [Canada's Anti-Spam Legislation](#).

Clients menu – Finding a patient's appointment

A patient calls in to check their appointment date and time but forgot when the booked. This is an excellent search feature!

1. Use the search feature at the top to find patients and to open their bookings.
 - a. Search by name, email or phone number
2. After locating the patient, you can view their profile, appointment history and if you click on the appointment it will bring it up for you to view and even edit if needed. If the patient forgot their appointment time, click on Remind and send them a reminder so they have it in the email inbox.
3. You cannot delete accounts, however you can go in and remove most of the details on the account if you have a lot of fake/test accounts. You can also rename them as **zzzzzTest account** only for example and by doing this these accounts will show up at the bottom of your list.

Setting menu

Settings → Staff profiles

- a. You can adjust what services are Offered by this pharmacist. By associating a service for that person, it will be available for booking online automatically for that person.
- b. You can also change name, primary email (note changing the primary email will impact your login, but does not change the “Support” email listed on your booking page).
- c. If you require multiple licenses, please contact vince.lee@bcpharmacy.ca, the cost is \$15/month per additional license.
- d. If you have multiple licenses please see next page.

Settings → Worktime

You can come here to adjust your works time. See Table of Contents of page number.

Settings → Services

See Services section of this guide. See Table of Contents of page number.

Settings → Rooms

Best used if you have multiple licenses on your account. Not in use for single license accounts.

Settings → Payment Methods

1. Add Tax
2. Add Cancellation Reasons to keep track for why people are cancelling.

Settings → Scheduled Reminders & Notifications are sent

Booking Confirmation

This controls how the patient is notified when they first make the booking. This is sent automatically to anyone that makes a booking more than 24-hrs in advance.

Appointments you enter from the backend will not receive this booking confirmation email, you need to send it manual by opening the appointment and clicking on Remind.

You can choose SMS (text message) or Email or none.

Booking Reminder

This controls the reminder that is automatically sent 24-hrs before the appointment. These reminders are sent automatically for backend bookings as well, as long as the appointment was entered in more than 24-hours ago.

- a. None
- b. Notify email (only)
- c. Notify SMS (only)
- d. Notify SMS first (if not then email)
- e. Notify email first (if none then send SMS)
- f. Notify by both email and SMS (this is the default setting)

Settings → Online Payments

You will need a Stripe account to do this. If you need help, let us know.

Settings → System Settings – turning off emails to your admin email

By default you receive an email notification by BCC of every booking email that is sent to your patients who make an appointment or cancel an appointment. If you want to turn this off, turn off BCC here and Save.

Settings → System Settings – Scheduler view

By default when you open your Scheduler, it will show you All staff accounts whether they have a worktime or not.

We recommend not using Working Staff view.

Settings → Products (Inventory Control)

This section is your Inventory control. You need a Premium plan to access this service.

1. Add products and inventory here
2. Go to the actual **Service** to link the inventory under the **Associated Products** section of the specific Service.
3. Inventory will deplete by one each time someone books that service.

Please refer to the **Services** section of this guide book if you need help accessing the **Service** (please refer to the Table of Contents).

IMPORTANT NOTE: Please be sure to monitor your inventory periodically to ensure the supply is up-to-date under this section.

Booking site links

Go to **Online Booking**

You can access your online booking link for all services or links to each specific service there.

Block Upcoming Booking Times

If don't want to allow for bookings that are same day or just 2 hours from now? You can use this automated feature to block out upcoming shifts based on time. Block spots that are coming up 12-hours from now or just 1-hour in advance, up to you. By default it is set to 0.

Go to **Online Booking** → **Block bookings prior to?**

Booking site custom message block

Want to add a custom message to the top of your booking site?

Go to **Online Booking** → **Change settings** and insert your message to the **Scheduler Message:** text box.

Managing multiple license

Go to Settings → Staff

The main account listed first has the Role of **Owner**.

Your additional users you can choose them and then click on **Advance (Optional) → Details → Role:**

About Roles

Front Desk:

- Book and cancel appointments
- Manage consultant/practitioner worktimes
- Clients CANNOT book services from the Front Desk role.

Consultant/Practitioner:

- View past and upcoming appointments assigned to the consultant/practitioner
- View his/her own commission report
- Clients can book services from the Consultant/Practitioner role.

Administrator:

- Access to everything Front Desk can do
- Manage staff
- Access to business reports
- Access to advance settings (emails, client followups, etc)
- Clients can book services from the Administrator role.

Advance (Optional) → Login Info

Needs to be enabled so your staff can log in themselves and gain access as noted above.

Additional staff emails need to be input here as we have only put template emails in setting up your account. Once you add the email you can have your staff go to the admin login page <https://b.telehippo.com/r/login> and click on **Forgot Password** to setup a password.

Advance (Optional) → Online booking

Is bookable: You need to allow booking via scheduler so that they can be booked from the back end.

Accept Online Bookings? Turn on so patients can book them online.

Accept Marketplace Bookings? Turn on so patients can book them online.

Two more steps so your second staff profile will work:

1. Add Services to their account, which should be the next screen you see. If it does not take you there, you will need to go to **Settings → Staff → Offered Services**
2. Now add worktimes at **Settings → Worktime**

Waitlists

This feature requires a Premium subscription plan.

- **Setup of a waitlist.** Please refer to the **Services section** of this guide on setting up a waitlist.
- **Accessing a waitlist.** See the **Services section** of this guide on **accessing your waitlist** and how to use it to send mass email blasts or calling patients on the list.

STEP 5: START MARKETING

Online Booking

This is your booking link. If you have tested out the full system, and worked out your entire workflow, you can now copy this URL and post it to the community!

1. Go to **Online Booking** → **Copy booking link**. Post this link on your website and then share the link to your website through your social media channels.
2. Post this link on posters in your pharmacy and the front of your pharmacy.
3. Update your pharmacy's phone auto-attendant message and let your patients know they can book online now and include your booking link. If they do not have email or SMS, they can talk to a pharmacist and make an appointment.
4. For flu, post this booking link on the Immunize BC Flu Locator (don't have a profile setup with Immunize BC Flu Locator? It's free. Learn how to do it on the [BCPhA Flu Resources Page](#)).

STEP 5: MONITOR APPOINTMENTS AND GET FEEDBACK

1. You will receive an email each time someone books. Go into their appointment and see if they are completing the information okay.
2. Seeing people not completing the forms? If there are any issues, contact the patient to get feedback if you need it.

STEP 6: DAILY TASKS

1. Log in <https://b.telehippo.com/r/login>
2. Print your daily schedule (see Table of contents for the section on the Scheduler section of this guide).
3. Email or SMS those who did not complete the COVID-19 or Vaccine Screening forms.
4. Those who did not complete the COVID-19 pre-screening, might be people you want to call to both confirm they are still coming for the appointment and the time, as well as perform the COVID-19 pre-screen in advance.
5. Review each patient's screening forms by opening their appointment and mark-off any items you need to discuss with the patient on your daily schedule or if you choose to print out the Vaccine Screening form for each patient in advance mark it off on the form. Open the appointment, click on the **Signed** box beside the form and open the form and then click on **Print**.
6. You can also click on **Edit Vaccine Info** to digitally enter all the pharmacist only section online as well or print and enter the information manually.

IMPORTANT NOTE:

The Vaccine Screening form **Pharmacist Section** can be completed digitally real-time or you can choose to print them all out for the day as a PDF each morning and even ask patients to sign when asking for consent to provide the vaccine. The form itself is a screening form as the act of the consent should still be the responsibility of the pharmacist discussing with the patient. As the patient has read the screening form this will make this process a bit faster.

The system does not allow for you to edit patient information entered on to the forms for compliance, so if you need to change anything, print it out and mark it off and have the patient initial.

Getting Help

Do you have additional questions about how to use the application? Please feel free to email us at info@bcpharmacy.ca. We would be happy to help with any questions you have.