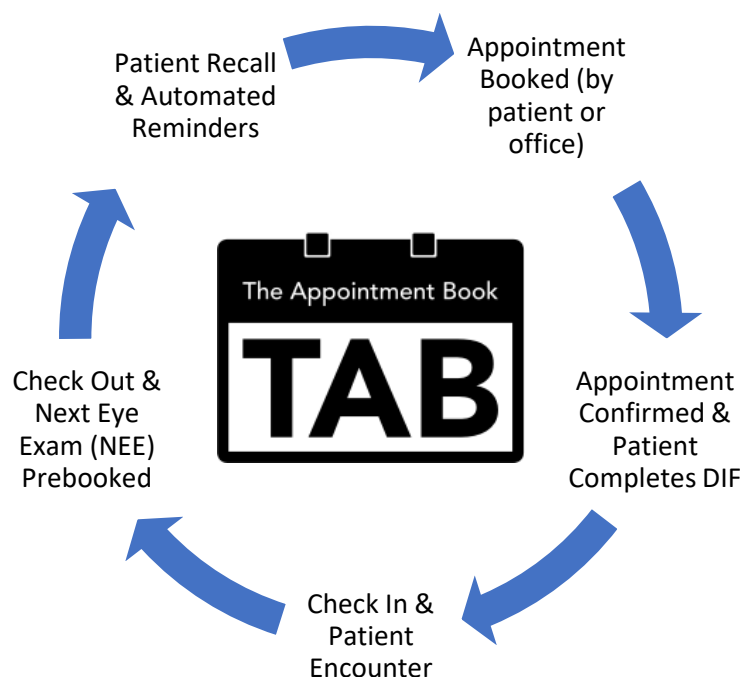


**The Appointment Book (TAB)** is the scheduler within ECLiPS which includes the patient **Digital Intake Form (DIF)** application. TAB is designed to be easy to use & prioritize information at a glance.



## Use The TAB Quick Reference Resource Tool To:

- Understand the exam and TAB symbols and color codes by appointment type
- Quickly and effectively manage your book by identifying missing information and unconfirmed appointments
- Search or reschedule patients
- Check in & out patients including prebooking for next years annual eye exam

**Log on to Leonardo to complete these foundational training lessons for TAB and DIF:**

- <https://leonardo.essilorluxottica.com/login>
- Use your Luxottica ID and Network Credentials
- Once in Leonardo, use Search and type the **exact title** of the lesson to locate or click the below links

Leonardo Lesson	Duration
<a href="#">Run the Business with The Appointment Book</a>	15 min
<a href="#">Digital Intake Form</a>	10 min
<a href="#">Using The Digital Intake Form With The Connect Application</a>	5 min
	30 min

## Appointment Color Codes

<b>red</b>	Unconfirmed	<b>forest green</b>	Online confirmed by office
<b>burgundy</b>	Confirmed	<b>pink</b>	Next Eye Exam unconfirmed
<b>light green</b>	Online unconfirmed	<b>purple</b>	Checked-In
<b>dark green</b>	Online confirmed	<b>blue</b>	Checked-Out
		<b>yellow</b>	Event

## Finding/Updating Patient Information

- Click "search" button at top of screen.
- Enter last name or phone number and first name or DOB to locate patient and click search button.
- Click on patient's name.
- Update information.

## Checking a Patient In

- Click on patient's appointment.
- Click "check in" button at bottom of screen.
- Appointment should turn purple.

## Checking a Patient Out

- Click on patient's purple, checked-in appointment.
- Click "check out" button at bottom of screen.
- Click "Yes" to create the next Eye Exam for the patient.
- Complete required fields, including exam type. Click "Next."
- Click "OK" to add NEE info to clipboard at top right of screen.
- The calendar navigates to Unconfirmed NEE page 53, weeks ahead.
- Click "(p)" to paste the patient's information into her desired date and time.
- The Next Eye Exam appointment should turn pink.
- Click "Home" to return to schedule and current day's date.
- Checked out appointment should now be blue.












## Moving the NEE to a Scheduled Appointment

- Click "search" button at top. Enter last name or phone number and first name or DOB to narrow search. Click "Search."
- Click "update" next to patient's Next Eye Exam.
- Click "cut" button at bottom of screen and "OK" to add patient's information to clipboard at top right of screen.
- Navigate calendar to appropriate day/time on Scheduled Appointments.
- Click "(p)" to paste appointment onto page.

## Rescheduling a Patient

- Click on patient's name.
- Click "cut" button at bottom of screen and "OK" to add patient's information to clipboard at top right of screen.
- Navigate calendar to appropriate day/time on Scheduled Appointments.
- Click "(p)" to paste appointment onto page.

## TAB Symbols

	Insurance billing approved
	Insurance billing pending
	Insurance billing declined
	Payment option unknown
	Cash or other payment
	Phone call placed by office
	Auto-phone call placed
	Appointment booked by EyeMed field rep
	Appointment booked by call center
	Recurring event
	Help or additional information

## Accessing Reports

- Click "reports" button at top of screen.
- TAB defaults to the Schedule Report. Other reports can be accessed by clicking on the drop-down arrow to the right of the "print" button.
- Set appropriate parameters, such as beginning and ending time, Optometrist, etc.
- Click "refresh" button at top.
- Click "print" to print.

## Exam symbols

- (a) Schedule an exam appointment
- (e) Schedule a check/follow-up appointment
- (ck) Schedule an Event
- (p) Paste an appointment from clipboard
- (nc) Schedule a new contacts appointment