

# SCHEDULING NEXT EYE EXAMS IN ECLIPS

**It Is Important That We Schedule All Patients For Their Annual Exam & Have Dialogue With The Patient Around How They Would Like To Receive Reminder Communication.**

- ❑ From The **SCHEDULER TAB**, Select The Patient And Update/Confirm Communication Preferences
- ❑ Click “Check Out” When Finished Updating Communication Preferences

Patient Communication Preferences (Please choose at least one communication preference)  
Ask the patient, "How would you like to receive appointment communications?"  
Select the patient's preferred communications method(s) below and verify/update the appropriate contact information.

**Email:** Yes ☒ Do you want to opt into email for confirmations, reminders, information and offers from the doctor?  
Email Address: \* studentcal@gmail.com  
Is this email address registered to an adult? \* Yes ☒

**Text:** No ☒ Once opted in, the patient will receive appointment communications via text.  
**STOPPED:** Office has opted the patient out of Text Messages  
**Phone:** Yes ☒ Ask the patient "Is it OK if we call you with a live or pre-recorded appointment reminder?"  
Primary Phone: \* Call ☒ (619) 232-2823  
Secondary Phone:

**Mail:** Yes ☒ Send mail notifications, for example eye exam reminder Postcards.  
Address: \* 7259 Vassar Ave  
Address2:   
City, State/Province, Zip/Postal Code: \* La Mesa, CA 91942

☐ Patient chooses not to receive appointment communications.

- ❑ Indicate If An RX Was Written And Enter Exp Date Or Bypass By Selecting NO
- ❑ Select “Yes” When Prompted To Create Next Exam

Create Next Eye Exam

Check Out Patient

Was RX for glasses or contacts written?

☐ Yes ☐ No

Do you wish to create the Next Eye Exam for this patient?

- ❑ Select Appointment Type On The Pull-down Bar
- ❑ If You'd Like To Enter Any Notes, You Can Do So On In The Notes Area
- ❑ Select Next When Ready For Next Step

Patient Information

\* = Required Fields

Last Name: \* Student  
First Name: \* Lisa  
Middle Name:   
Birth Date: \* 08/07/1980 (MM/DD/YYYY)

Appointment Type: \* Existing Patient - Eye Exam

Doctor Preference: ☒ Doctor Preference ☐ No Doctor Preference

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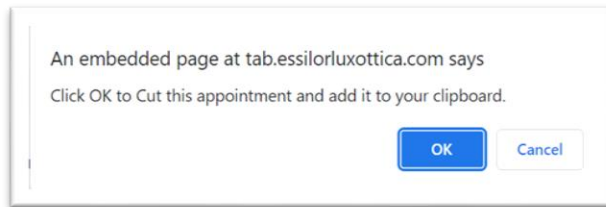
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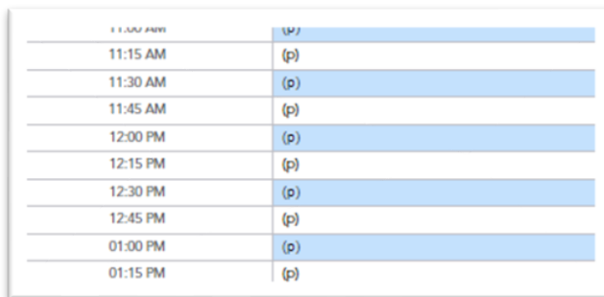
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# SCHEDULING NEXT EYE EXAMS IN ECLIPS

- ❑ Click Ok to Cut and Paste the Appointment



- ❑ Click On "P" To Paste Your Appointment
- ❑ **Note:** The System Will Automatically Schedule 1 Year And 5 Days Out, But You Can Change The Date And Time To Accommodate The Patient (Use Calendar)
- ❑ All Pre-appointed Or Next Eye Exams Will Be "Pink" Once Scheduled



|          |     |
|----------|-----|
| 11:15 AM | (p) |
| 11:30 AM | (p) |
| 11:45 AM | (p) |
| 12:00 PM | (p) |
| 12:15 PM | (p) |
| 12:30 PM | (p) |
| 12:45 PM | (p) |
| 01:00 PM | (p) |
| 01:15 PM | (p) |

- ❑ By Completing This Process, It Will Mark The Patient As "Checked Out" On **The HOME TAB** In ECLIPS
- ❑ If The Patient Is In The Office For A Follow Up Or Anything That Is Not A Routine Exam You Will Not Pre Schedule-Their Annual Exam, However You Will Update "Checked Out" From The Pull-down Bar On The Home Tab

