

Appointment Color Codes

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