Quick Start Guide - Flu Shot Scheduling / Biometric Screening Scheduling

Overview

This Quick Start Guide will help you set up an online scheduler in no time flat!

Here's a brief overview of what's covered in this guide:

- Creating an account
- Navigating in the Admin tool
- Creating an Event on your account
- Creating Time Slots on your Event so you can start taking appointments
- Previewing your online scheduler

Terms

A few terms before we get started.

- **Account** - an account will hold your events. You may have only one event on your account, or you may have multiple events. You may also have multiple accounts with us. Each account has a unique scheduling URL that you can provide to your customers.
- **Event** - an event that you create on your account. An event can span multiple dates. An event can represent one location, or one type of appointment
- **Admin UI** - the Administrative User Interface, this is the tool where you will set up and manage your event
- **CUI** - the Customer User Interface or Online Scheduler. This is the unique link that your customer will log in to in order to book their appointments.
- **Resource** - the entity that holds your time slots. This could be the name of a person (e.g. Dr. Joe, PA Jones) or it could be a generic entity name (e.g. Flu Shots).

Create Your Account

The first step to getting started is to create an account with pickAtime. Visit https://pickatime.com and select the Sign Up Now button. Fill out the form on the page and you are ready to start.

Navigation

Log into your pickAtime account by entering your email address and password at the Client Login section of our home page. You will be in the Reporting area, and will have a navigation line at the top of the page.

Navigation Links

- **new Admin UI** - Create and Manage your online scheduler
- **Importer** - Optionally import data (people, slots, appointments, events)
- **Online Scheduler** - Your online scheduler
- **Edit Profile / Change Password**
- **User Manual**

Admin User Interface Navigation

There are two types of pages within in the Admin UI

ACCOUNT MANAGEMENT
The Account Management page is where you will adjust settings that will apply to your entire account.

Tabs and Links within the Account Management page:

- **Event List** - Add and delete events.
- **Appointments List** - View all appointments
- **Contacts** - View all contacts
- **Global Setup**

EVENT MANAGEMENT
The event managment page is where you will adjust settings for a selected event.

Tabs and Links within the Event Management page:

- **Appointments** - Create time slots and view and manage appointment bookings
- **Settings** - Modify any of the default settings for your account, customize your E-Mail Templates, customize your Scheduler.
- **View** - View the Reports, the Online Scheduler, or the User Manual

STEP 1: Create Event

- Select the **Events List** tab on the upper left hand side of the Admin UI
- Click on the green plus sign, enter in a name for your event (e.g. Flu Shots at Bellevue), set the

Type to normal, select the Template event of **Flu Shot Template** or **Health Appointments Template** and set the Time Zone. If you have multiple locations then you would want to create an event for each location
- Optionally fill in a date(s) label and location

STEP 2: Create Time Slots

- Select your event and click on the Manage Event icon to the left of the event name. This will open up the EVENT MANAGEMENT page
- Select the **Appointments** tab
- Select the **Resources** drop-down and click on **Add Resource**
- Click in the title area of the new resource and edit the name. The name of your resource could be the name of a clinician, or it could be a generic name such as "Flu Shots" or "Biometric Screening."
- On the Calendar on the left hand side click on the first date of your event
- Select the **Slots** drop-down and select **Create Slots**
- Enter the parameters for your slots and press OK
- If your event has multiple days *with the same time slots*, you can check the box in the Slot Generator dialog box next to "multiple dates."
- To create different slots on a new day, simply click on the day on the calendar on the left hand side and select **Slots** and then **Create Slots**

STEP 4: Adjust Settings

- On the Event Management page select the **Settings** tab
- Select the **UI Setup** tab
- Set the Start Date and End Date of Appointment Availability
- Optionally adjust other settings on this page.

STEP 5: Preview your Scheduler

- Select the ACCOUNT MANAGEMENT window
- Select the **Global Settings** tab and then select **Business Setup**
- Locate your scheduler URL at the bottom of the page
- Optionally customize your link and then click on the link to preview your scheduler

Frequently Asked Questions

Here are some of the more common FAQ’s:

Q. I have multiple locations for my event
A. On the Event List page you can create a new event for each location

Q. I have multiple dates for my event
A. On your event you can create multiple days of time slots. Simply use the calendar on the left hand side and create slots on your first date. Then click on a new date on the calendar and repeat.

Q. I'd like to customize the emails
A. On the Settings > E-Mail Templates page you can customize the Confirmation email, Reminder email, and Cancellation email.

Q. How do I see who has signed up for an appointment?
A. When you first log into pickAtime from our home page, you will be in the Reporting area. Here you will be able to see scheduled appointments. There are a number of different reports available.

You can also view appointments in the Admin UI. Select your event from the Account Management page, and then select the Appointments tab. Click on a date and time and you will see the name of the person displayed in the time slot.

Q. Where do I go for more help?
A. Click on the User Manual link on the main navigation page. Locate the section of the User Manual on Event Scheduling. You can also email support@pickatime.com for more information.

Q. This seems to easy, is that all there is to do?
A. Setting up a scheduler is easy. The pickAtime Admin UI is a powerful tool, and has many more options available that described in this Quick Start Guide. For more information, see the Advanced Options section of the User Manual. Here you will find information on options such as: allowing a customer to take multiple time slots, limited the number of appointments scheduled in any given day, displaying your early time slots first, adding an initial sort to your page, such as a sort by state or city, restricting eligibility to the scheduler.

More Advanced Features

Q. I'd like to collect a phone number from my participants or ask them if they have any specific allergies.
Collecting Information from your Participants

Q. Can I restrict access to only eligible employees?
Restrict Access to the Scheduler

Q. I'd like employees to be able to sign up their spouse as well.
Allow Participants to take Multiple Slots