

Opti-Schedule™ News



Welcome to Opti-Schedule News!

Welcome to the first issue of Opti-Schedule News. As you know, Opti-Schedule has been growing quickly to meet your needs. Since you may not have heard about every new feature as it became available, we will highlight new features each month and also cover some older features you may have missed.

This newsletter is for you; please let us know at newsletter@opti-schedule.com if you like it, dislike it or have something you would like covered in future issues.

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Follow-up appointments

Users can now easily schedule a follow-up appointment. A follow-up appointment is an appointment that flows from the initial appointment and is usually a check-up on the initial appointment. Each appointment type that could have a follow-up scheduled is assigned a follow-up appointment type.

By clicking on the **Schedule follow-up** button, the user is offered a list of slots available for the follow-up appointment type. You can specify how many days out you would like the follow-up appointment to be scheduled and users can move forward and backward a week at a time to find a suitable slot.

The follow-up appointment is pre-filled with information from the original appointment. Once a follow-up appointment is scheduled, a user can quickly jump to the follow-up appointment using the "Go to Follow-up" button and come back using the "Go to Follow-up source" button.

No-show reminders

You now have the option for no-show patients to receive a friendly call or email the day after they missed their appointment. An example no-show reminder call is:

Hello, this is Acme Optical and we are sorry you missed your appointment yesterday at 3:30pm at our Downtown office. Could you please call us at 555-1212 to re-schedule your appointment. Thank you and we look forward to seeing you soon!

There are now 4 types of reminders available:

- ♦ **Appointment** - sent 1-2 days before appointment
- ♦ **Pick-up** - sent when order is ready
- ♦ **No-show** - sent day after no-show
- ♦ **Pre-appointment** - sent 30 days before pre-appointment

If you would like to start sending any of these reminders, please contact Customer Support.

Utilization reports

Currently, there are several utilization reports available currently in Opti-Schedule. You can look at Doctor Utilization by using either the **Doctor Utilization by Doctor** report:

Doctor utilization by Doctor from Saturday Jan 1, 2005 through Monday Feb 28, 2005			
Doctor	Total	Jan	Feb
Able	63%	63%	62%
Baker	62%	60%	63%
Carter	61%	61%	60%
Donaldson	68%	69%	67%
Total	63%	63%	63%

or the **Doctor Utilization by Location** report:

Office	Total	Jan	Feb
Central	65%	65%	64%
Downtown	59%	58%	60%
East End	60%	61%	60%
Northwest	62%	63%	61%
Southside	71%	72%	70%
Total	63%	63%	63%

The previous two reports summarize utilization in a monthly fashion with a year-to-date total. When you need more detail about utilization, check out the Exam utilization reports. These reports provide utilization by location, either by hour or time period. You can summarize data by Day, Week, Month, Quarter, or Year. Here is an example of the **Exam-Utilization (hourly)** report:

Office	All day	7a	8a	9a	10a	11a	12p	1p	2p	3p	4p	5p	6p	7p
Central	65%		44%	65%	72%	69%		72%	60%	61%	49%	81%	97%	88%
Downtown	59%		50%	59%	62%	58%		67%	43%	37%	59%	89%	92%	94%
East End	59%		48%	58%	55%	57%	92%	57%	29%	53%	56%	88%	82%	88%
Northwest	62%		53%	70%	73%	61%	72%	41%						
Southside	71%		59%	81%	69%	64%	71%	79%	57%	58%	71%	97%	95%	88%
Total	63%		50%	64%	65%	61%	76%	66%	48%	52%	60%	90%	90%	89%

Promotions information

One of the major challenges you face is ensuring that all your users know about current promotions. Opti-Schedule has added a Promotions screen that helps you solve that problem. Users find it under the Info menu option. It provides information about all current promotions in a Question and Answer format. Your promotion administrator can easily update the promotion information and even specify date ranges for the promotion information to be available. Here is an example of a **Info/Promotions** screen:

Buy 3, Get 1 Free Promotion
What do I have to buy? Buy any three frames at regular prices and receive a fourth frame free.
Does this include an eye examination? No, an eye examination is not included.
Is this available on Saturdays? Yes, except when a full moon falls on that Saturday.

There is also a Question screen that includes frequently asked questions with answers. If you would like to start using Promotions or Questions information, please contact Customer Support.

Contact info

Contact	Email	Phone
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