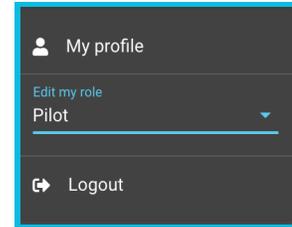


Reference Document - Pilot

1. Go to: <https://admin3.clicsante.ca/login>
2. Log in to the planner using your email and your password.
3. You can change your password and your personal information in the My Profile tab. Make sure you have the Pilot role.
4. In the taskbar on the left, click the Settings tab. This menu will allow you to customize the application.

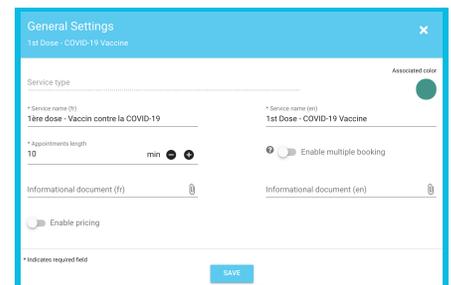


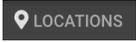
5. The Services section includes a complete list of the services offered at your institution. You can activate or deactivate a service and associate services with the right locations.



6. The general settings  menu allows you to enter the name of the service and the duration of the appointment. You can add an information file and activate pricing if relevant.

7. In the general settings , you always can add a description to the service, a message or an instruction. You can also choose the personal information relevant to the appointment booking. If needed, you can activate the display of the appointment duration on the public page and the number of days of availability displayed.

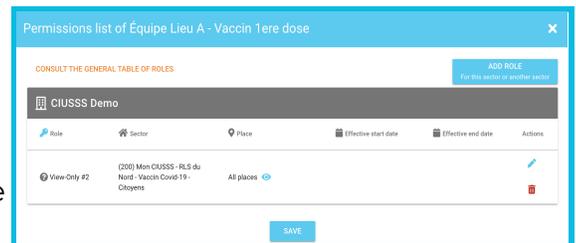


8. The Locations  tab includes a complete list of locations where your services are offered. You can add, modify, activate or deactivate a location. You can add a message specific to this location for users. Don't forget to associate your locations with the right services!

9. The resources  tab includes a complete list of resources that offer services or have access to the Planner. You can add a resource or team and change roles and permissions. You can also activate or deactivate a resource/team as needed.

- To add a team, select Add a team . The Add Team window will pop up. Enter the name of the team and choose the capacity: fixed (the number of teams you want to add will be displayed) or variable (the number of appointments per time slot varies from day to day).
- To add a resource, click on the  resource icon. The Add Resource window will pop up. Enter the name and contact information of the resource. Activate access to the planner and enter a temporary password that the resource can change.

- It is important to change the permissions of the new resource. By default, the resource will have the role Consultation #2. First, click on the key  button. Then by clicking on the pencil  icon you will be able to modify the role for this sector or add/modify for another sector. It is therefore possible to add several different roles for several locations.

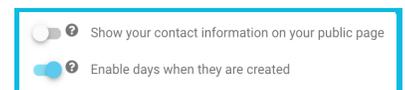


- Choose the role you wish to grant, the banner (CIUSSS, sampling centre, etc.), the sector (establishment #) and finally the location.

- The Booking page  allows you to configure your reservation page. Enter your information.

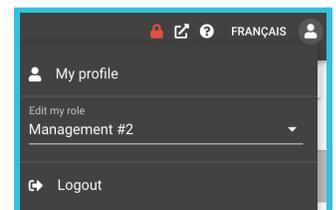
- The Communications  page includes notifications sent to users that can be automated. Choose whether or not to enable the first reminder, the second reminder, the Follow-Up following an absence or a cancellation.

- Set up your public page by choosing to display or not display your contact information. Activate or deactivate a day at the time of its creation.



- Include a welcome message in both languages, as well as a pop-up message to emphasize important information that the user needs to know before proceeding with registration.

- To safely log out, use the user icon in the top right corner and click Log Out.



Technical Support:
support@trimoz.com
 1-844-669-2474 or (418) 669-2474 ext 1



Here is a checklist to assist you in the configuration and customization of your planner.

Services tab

General Configuration

- Services names are validated
- Appointment durations are checked
- Attachment of an information document (if relevant)
- Pricing is activated (if relevant)
- Colour matching is customised (if relevant)

Description, Messages and Instructions

- The description of the service (if relevant)
- Instructions (they will appear on the appointment confirmation email)
- Message without availability (if relevant)
- Message with availability (if relevant)

Personal Information

- The personal information required for each service is validated.
(The personal information that is activated will appear in the form to be filled out but will not be necessary to proceed to the next step and make the appointment. The required personal information is mandatory in order to book the appointment and proceed to the next step.)

Booking Page Display

- Appointment duration display is activated (if relevant)
- Available days to be displayed on the Booking page are indicated (if relevant)

Filters and Questions (if relevant)

- Up to 3 questions (up to 3) in both French and English are entered
- French and English unavailability messages are entered

Location tab

General Configuration

- The contact information for each location is entered correctly.
- A specific message for each location is entered (if relevant)
- Services and locations are correctly linked

Resources tab

General Configuration

- A team for each location is created
- Necessary resources are created

Modify the Role

- Resource roles are correct
- Role created for each resource within this or other sections (if relevant)



Communication Tab

General Configuration

- The first reminder is activated
- The second reminder is activated
- The Follow-Up for an absence is activated (if relevant)
- The reminder following a cancellation is activated (if relevant)
- The SMS and email fields are activated

Booking page Tab

General Configuration

- Contact information that will be on the Booking page is entered
- Available days are activated

Communication

- Include a welcome message in French and English.
- Include a pop-up message.
- Include a temporary message (when appointment scheduling is not available - if relevant).

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