MENTAL HEALTH MIS

SCHEDULER





County of San Diego Behavioral Health Services

Scheduler

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CONFIDENTIALITY

HIPAA regulations mandate that <u>all</u> client information be treated confidentially.

Access to CCBH is based on your position and your job classification. You will have the access you need to complete your job duties. This can include access to clients in your Unit/SubUnit or may include full client look up. Remember – with more access comes greater responsibility regarding confidentiality!

You are <u>not</u> to share passwords with other staff. The Summary of Policy you signed before receiving your access to CCBH included your agreement to this directive. You are still responsible if someone with whom you have shared your password violates confidentiality!

The MIS unit investigates any suspicions regarding sharing of passwords. Consequences are up to, and may include termination.

Do not open any active client charts unless instructed to do so, or if it is required to complete your job duties. "Surfing" clients is a blatant breach of confidentiality.

Remember you are personally and legally responsible for maintaining confidentiality. Take it seriously.

Do not leave your computer unlocked with client data on the screen for others to access or view while you are away from your desk. Lock your CCBH session before leaving your computer.

When printing, make sure you are printing to a confidential printer, and pick up your paperwork quickly. Leaving printed Protected Health Information (PHI) out is also a confidentiality violation.

Play it safe – keep in mind how you would want your own PHI handled!

Accessing the External View Via the Clinician's Homepage

If you will be working outside of the Clinician's Homepage (for client assignments, service entry, scheduler, reports, etc.), click on the File Tab, click "Menu", and click your desired menu and submenu(s).

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File Home C	Client View			
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About CCBH	<u>Ś</u> cheduler Client <u>A</u> ssignments	> [> [Scheduler Maintenance - Mu	
	Client <u>Financial Information</u>	*	Scheduler Setup	×
	Client <u>R</u> eviews		Scheduler Reports	F
	Client Services	•		
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LOCATION AND STAFF WORK SCHEDULES MAINTENANCE

Program Managers and/or Administrative Staff will be responsible for maintaining the "Location and Staff Work Schedules Maintenance" for their own program(s).

To access:

- Click on "Scheduler"
- Click on "Scheduler Setup"
- Click on "Location and Staff Work Schedules Maintenance"

File Access	Scheduler Client Assignments Client Fir	nancial Information Client Reviews Client Services ATP
	Scheduler Maintenance - Multi Day	
	Scheduler Maintenance - Single Day	
	Scheduler Setup 🔹 🕨	Location and Staff Work Schedules Maintenance
	Scheduler Reports	Reserved Time Maintenance
		Transfer Scheduled Services

- The "Location and Staff Work Schedules Maintenance" screen appears.
 - 1. On the left side of the screen, programs are listed vertically by unit. Click on your program. *NOTE: You may need to scroll down to find it*
 - 2. In the "Flags" section, check the "Closed on Holidays" box if your program is closed on New Year's, Memorial Day, 4th of July, Labor Day, Thanksgiving, and Christmas. Do not check off any other boxes

Location and Staff Work Sch	edules Maintenance	(Administrative Acc	ess)		_ 🗆 🗙
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🗄 🗾 (1120) NORTH CENT	Flags				
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	Closed on Holiday	ys?		Individual Services	Group Services
🗄 🗾 (3000) U PAC MIDTO		Work	Break1	Meal	Break2
 <u> <u> </u></u>	□ Sunday □	Apply	Apply	Apply	Apply
	Monday				
	🔽 Tuesday				
🗄 🗾 (3090) DOUGLAS YO	✓ Wednesday ✓ Thursday				
 	Friday				
	🗆 Saturday	2			
	🖯 Add Staff			📘 Save	Clear X Delete
C Eind	oand 🖞 C <u>o</u> lla				<u>x</u> Ex <u>i</u> t

Time Entry

- 1. Enter the program's business hours. Use an "A" for AM and a "P" for PM.
- 2. For each day the program is open, check the corresponding box
- 3. Click "Apply"
- 4. Click "Save"

🚺 Location and Staff Work Schedules Maintenance (Administrative Access)								
	Docation Schedule for H	HSA MH BILLING UNIT						
	Flags Automatically launch Pre-Paymen V Closed on Holidays?		matically Launch Billing Pi Individual Services	o Forma at Check In for: Group Services				
	Time Entry	Break1	Meal	Break2				
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	✓ Tuesday 08:00 AM 32 05: ✓ Wednesday 08:00 AM 32 05: ✓ Thursday 08:00 AM 32 05:	00 PM						
	✓ Friday 08:00 AM 20 05: ✓ Saturday 20 20 20 → Add Staff 30 30 30		4 Save	KClear XDelete				
▲ 	pand 🖞 C <u>o</u> lla			<u>x</u> Ex <u>i</u> t				

- 1. Click on the "plus sign" to the left of your program to view staff who have been set up.
- 2. To add an additional staff member, click "Add Staff

TI (1) HHSA MH BILLING ▲	De Location	n Schedule for HHSA MH	BILLING UNIT		
	Flags Automatically Closed on Ho Time Entry	launch Pre-Payments when C lidays?	-	natically Launch Billing F ndividual Services	Pro Forma at Check In for
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☑ (3080) NORTH COAS ☑ (3090) DOUGLAS YO ☑ (3100) SOUTH BAY G ☑ (3110) ARETA CROW ☑ (3120) MARIA SARDIN ☑ (3130) JANE WESTIN	I Thursday I Friday □ Saturday	08:00 AM 💥 05:00 PM 08:00 AM		Save	Clear X Dele

- 1. Locate the additional staff member from the table, and check the corresponding box
- 2. Click "Add"

ID	Name		Select 🔺	
	TEST, MH BILLING			
	ANASAZI, EMPLOYEE			
	EMPLOYEE, ANASAZI	_		
	CLINICIAN, ANASAZI	1		
	ONE, MD			
	ONE, RN			
	ONE, PHARMD			
	ONE, ADMIN			
	TWO, MD		Ō	
	THREE, MD			
	FOUR, MD			
	CLINICIAN, FAKE		Ō	
				🔀 All
				None
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				Q Eind
			2	Add 📕

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SCHEDULE TYPE

- 1. To set up a specific staff member's schedule, click on his/her name
- 2. Click on the down arrow to the right of the "Schedule Type"
- 3. Choose the appropriate "Schedule Type" from the table

L-Same as Location-Staff works the same days and hours that the program is open

R- Rotating- Not used in the County of San Diego

S- Shift- Not used in the County of San Diego

W- Weekly- Staff normally works the same schedule every week

By choosing "Weekly", specific break and meal times can be entered for the individual staff member. This is done the same way "**<u>Time Entry</u>**" was explained in the Location and Staff Work Schedules Maintenance section. *NOTE: Be sure to "Save" when finished*

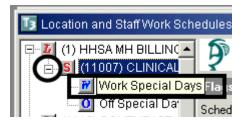
15 Location and Staff Work Sch	edules Maintena	ance (Administrative Acce	ss)		_ 🗆 🗙
- 1) HHSA MH BILLINC	🗊 Staff S	chedule for CLINICAL, S	TAFF		
	T				
	Flags		\frown		
1120) NORTH CENT	Schedule Type:	L - Same as Location			
		- <undefined></undefined>			
	Time Entry	L - Same as Location R - Rotating			
		S - Shift	eak1	Meal	Break2
	L	W - Weekly			
			ļ		
⊕ <u>⊿</u> (3020) U C S D CLINI		👃 Apply	👃 Apply	👃 Apply	👃 Apply
⊕ 🗾 (3040) HEARTLAND (🗖 Sunday				
	🔽 Monday	07:00 AM 06:00 PM			
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🗄 🗾 (3070) NORTH INLAN	₩ Wednesday	07:00 AM 06:00 PM	í	íí	í — í — — —
🗄 🗾 (3080) NORTH COAS					
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🗄 🔟 (3110) ARETA CROW	🗖 Saturday				
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Scheduler

WORK SPECIAL DAYS

Work Special Days is used to identify the days when a staff person is working in addition to his/her normal work schedule.

- 1. Click on the "plus sign" to the left of the staff member
- 2. Click on the "W" for "Work Special Days"



- Click in the "Date" cell to enter the date. Use the tab key on the keyboard to move from cell to cell and enter the "Work Begin" and "Work End" times, as well as the meal and break times (if applicable)
- All information is saved once you successfully tab to the next row

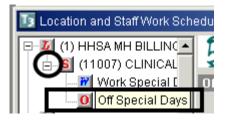
🖪 Location and Staff Work Schedules Maintenance (Administrative Access)										
□ 2 (1) HHSA MH BILLINC ▲ □ S (11007) CLINICAL	🗿 Staff Spe	cial Work	Days for C	LINICAL,	STAFF					
	🟮 Break1 Begin									
Off Special Da	Date	Work B	Work E	Break1	Break1	Meal B	Meal End	Break2	Break2	
	10/01/2014	09:00 AM	01:00 PM							

Scheduler

OFF SPECIAL DAYS

Off Special Days is used to identify the days when a staff person is not working during his/her normal work schedule.

- 1. Click on the "plus sign" to the left of the staff member
- 2. Click on the "O" for "Off Special Days"



• Enter the appropriate dates, the description, and "Save"

	🚺 Location and Staff Work Sche	edules Mainte	enance (Adminis	trativ	e Access)		
I	E 🗾 (1) HHSA MH BILLING	🇊 Staff	Special Off Day	ys fo	r CLINICAL, STAFF		
1	S (11007) CLINICAL	X				_	_
1	Work Special [Off Special		-		_	
1		From	Thru		Description		
		09/22/2014	09/25/2014		VACATION		
		11	11				
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	🗄 🗾 (2100) HILLCREST H	11	<u> </u>		<u> </u>		
	🗄 🗾 (3000) U PAC MIDTO	11	I //				
1	🗄 🔟 (3010) U PAC EAST V						
1	🗄 💆 (3020) U C S D CLINI						
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	🕀 🌃 (3040) HEARTLAND (
	⊞ _ <u>2</u> (3080) NORTH COAS ⊕ _ <u>2</u> (3090) DOUGLAS YO						
	⊕ <u>⊿</u> (3100) SOUTH BAY G						
	🗄 🔟 (3110) ARETA CROW 🔽					Save	Clear
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	Q Eind 🛛 🗔 Refre 🕻 🛱 Exp	and 🕹 C <u>o</u> lla	a				<u>x</u> Ex <u>i</u> t



MULTI DAY VIEW

The Multi-Day View allows the user to enter appointments on behalf of an individual staff and to view one staff person's daily, weekly, monthly or multi-day schedule. Client services may also be entered and viewed in the Multi-Day View.

To access:

- Click on "Scheduler"
- Click on "Scheduler Maintenance Multi Day"

File	Access	Scheduler	Client Assignments	Client Fin	ancial Ii	
01	×	Schedule	r Maintenance - Mult	i Day		
		Schedule				
		Scheduler Setup				
		Schedule	er Reports	+		

The Multi-Day screen displays.

• "Entity Type" will default to Staff

🜆 Multi Day View					_ 🗆 ×
\$ # 🖪 🖪	3 5 7 14 31 🔳				📰 📃 🖾 🔜 🔛
Entity Type: <mark>S - Staff</mark>	Entity:		<u> </u>	Locations: All	9
Mon 09/29/2014	Tue 09/30/2014 🔛	∕æd 1070172014	Thu 10/02/2014	Fri 10/03/2014	September 2014 F S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 <

To view a schedule

- 1. Enter the CCBH ID number in the "Entity" field and press the tab key on the keyboard. NOTE: If you wish to schedule for a client instead of staff, change the "Entity Type" to "Client", and enter a client case number in the "Entity" field
- 2. Leave the "Location" field on "All"

🜆 Multi Day View			_ 🗆 X
🕫 🥔 🖪 🖪 🕄	7 14 31		
Entity Type: S - Staff	Entity:	Locations: All	9
Mon 09/29/2014 Tue 0	92012 014 Wed 10/01/20	14 Thu 10/02/2014	▲ September 2014 ▶ S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 30 30 30 30

Scheduler

Adjusting the Calendar

• Click on the yellow icons to "Go to Today", or to see a "One Day View", "Three Day View", etc.



• On the small calendar on the right, click and drag from your starting date to your ending date. The larger calendar on the left will change accordingly. The left and right arrows take you from month to month

Entity Type: S - Staff 💽 Entity:	Locations: All		<u>q</u>
Sunday 09/21/2014	Thursday 09/25/2014		◀ September 2014 ▶
			SMTWTFS
			1 2 3 4 5 6 7 8 9 10 11 12 13
			14 15 16 17 18 19 20
			21 22 23 24 25 26 27 28 29 30
Monday 09/22/2014	Friday 09/26/2014		20 23 30
			I October 2014 ►
			SMTWTFS
			1 2 3 4
Tuesday 09/23/2014	Saturday 09/27/2014		5 6 7 8 9 10 11 12 13 14 15 16 17 18
1403009 0372372014	5000100y 0572172014		12 13 14 15 16 17 18 19 20 21 22 23 24 25
			26 27 28 29 30 31
			▲ November 2014 ▲
Wednesday 09/24/2014			S M T W T F S
			2345678
			9 10 11 12 13 14 15
		-	23 24 25 26 27 28 29 30

Scheduler

VIEW OPTIONS

• Click on the below icon to access the "View Options"

🖪 Multi Day View		<u> </u>
\$ 🖨 🖥 🔳 🗿 📕		🗹 💽 🔳 🛋 🖬 🖬 😭
Entity Type: S - Staff 💽 Entity:	Locations: All	<u> </u>

• Under "Filters", check the boxes for "Display Resolved Services" and "Display Cancelled Events". This ensures that resolved and cancelled events remain on the calendar instead of disappearing

🥅 Multi Day View Opt	ions		×
Filters :User Interface	Filters Filters Display Reserved Time Only Display Resolved Services Display Canceled Events		
-	Check In Display C All C Checked In C Not Checked In		
		🔀 <u>O</u> k	X Ca <u>n</u> cel

- Under "User Interface", choose your preferred icon size. Small icons are used throughout the screenshots in this resource packet
- Click "OK"

🥅 Multi Day View Opt	ions	×
Eilters User Interface	User Interface	
	Display ToolTips?	
	Icon Size Small Icons Large Icons	
		X Ok X Cancel

NEW APPOINTMENT EVENT

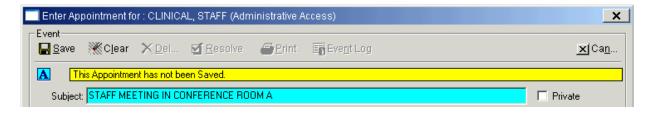
Appointments are events which do not involve a client.

• Right click in the white area below the day to be scheduled. A drop down menu appears. Click "New Appointment"

🜆 Multi Day View					_ 🗆 X
🛎 🧉 🖪 🔳	3 5 7 14 31			A I G 0 0	🖸 📕 💽 📴 📓
Entity Type: S · Staff	Entity	CLINICAL, STAFF	9	Locations: All	9
Sun 11/09/2014	Mon 11/10/2014	New Indi New Indi New Gro New Red New Red	Wed 11/12/2014		▲ September 2014 ▲ S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 • October 2014 • T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 <td< th=""></td<>
T				<u> </u>	1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30

- An appointment window appears
- Complete the "Subject" line. Enter a subject or a comment that may provide additional information (i.e. Staff Meeting in Conference Room A)

NOTE: You may mark "Private" to prevent the subject line from being viewed by other users. For example: a personal doctor appointment. However, that means only the attendee(s) will be able to open this window to make changes



• Select the "Event Type" from the drop down menu. All events are considered "Normal" except for an "All Day" event or a "Task" event. A "Task" event has no time associated with it and as a result will only appear in the Multi-Day view

Event Type:	N - Normal 📃 💌
	- <undefined> <mark>A - All Day</mark></undefined>
Unit	N - Normal T - Task

• For a "Normal" appointment event, enter the "Start Time." The system will default to "am". To indicate "pm" enter a "p" after the hours and minutes. For duration, enter as H:MM (i.e. 45 minutes would be entered as :45). One hour and fifteen minutes would be 1:15. The system will calculate the "End Time"



Note: In Scheduler, the period (.) is not recognized in all start /stop time fields. Select the "Time Type" from the drop down menu. B – Busy indicates an event has been scheduled; F – Free indicates time that other events could be scheduled T – Tentative indicates that an event is optional

- Enter your Unit, SubUnit, and Location where the appointment is being held. Enter any "comments" if desired
- Click "Save"

Enter Appointment for : CLINICA	L, STAFF (Administrative A	Access)	×
Event	🗹 <u>R</u> esolve 🖉 <u>P</u> rint	≣∎ Eve <u>n</u> t Log]Ca <u>n</u>
A This Appointment has not be	en Saved.		
Subject: STAFF MEETING IN CO	NFERENCE ROOM A		🗖 Private
Event Type: N - Normal 💌	Start Date: 11/11/2014	Start Time: 01:00 PM	Duration: 0:45
	End Date: 11/11/2014	End Time: 01:45 PM	Time Type: B - Busy 💌
Unit: TRAINING UNIT	9900	SubUnit: TRAINING S	SUBUNIT 9901
Location: HHSA MH BILLING UNI			

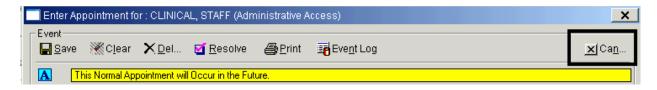
• The "Attendees" box is activated with the staff person's name, "Start Date", "End Date", "Start Time" and "End Time". Additional staff can be added by clicking "Add"

Enter Appointment for : CLINICAL, STAFF (Administrative Access)	×
Event Save XClear XDel ZResolve Print REvent Log	x Ca <u>n</u>
A This Normal Appointment will Occur in the Future.	
Subject: STAFF MEETING IN CONFERENCE ROOM A	Private
Event Type: N - Normal Start Date: 11/11/2014 III Start Time: 01:00 PM D	Duration: 0:45
End Date: 11/11/2014 🧰 End Time: 01:45 PM Tim	ne Type: B - Busy
Unit: TRAINING UNIT 9900 SubUnit: TRAINING SUBUNIT	9901
Location: HHSA MH BILLING UNIT	
Comments	<u>_</u>
Attendees	
	Start Time End Time T:00 PM 01:45 PM

• An "Add Attendee" dialog box opens. Select staff from the "Staff Lookup" drop down menu and click "Save". Repeat as needed

dd Attendee	es					×
Entity Type:	S - Staff			•		
Staff:	TESTĮ STAFF		<u>q</u>			
Event Type:	N - Normal	-				
Start Date:	11/11/2014		Start Time: 01:00 PM		Duration: 0:45	
End Date:	11/11/2014		End Time: 01:45 PM		Time Type: B - Busy	· -
					<u>B</u> ave 💥 C <u>l</u> ear	Cance

• After adding all attendees, click "Cancel"



EDITING AN APPOINTMENT EVENT

• Right click on the appointment event to be edited and click "Edit Appointment"

		<u> </u>
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Entity Type: S - Staff Entity: CLINICAL, STAF	F C Locations: All	9
Sun 11/09/2014 Mon 11/10/2014 Tue 11/11/201 01:00pm S ^{-7/}		September 2014 S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 4 15 16 17 18 19 20 1 22 23 24 25 26 27 3 29 30 - - - - 5 M T W T F S 6 7 8 9 10 11 2 3 4 15 16 17 18 9 20 21 22 32 24 25 5 5 6 7 8 9 10 11 2 13 14 15 16 17 18 19 20 21 22 3 10 11 12 13 14 15 14 15 17 18 19

- The "Enter Appointment for [Staff Person's Name]" screen appears. Make changes in the appropriate field(s) and click "Save"
- When the "Update Attendee and Calendar Records?" dialog box appears, click "Proceed with Save"

 Update all a 	ttendee and calenda	ar records with ne	w event time			
C Update only	those attendee and	calendar record:	s whose time n	o longer falls v	vithin the ne	ew event time

• If there is a schedule conflict, the "Schedule Conflict" dialog box appears. Click "Yes" to continue and save changes or "No" to review and correct before saving

Continue :	and Schedule on Staff's Time Off?
?	Appointment/Service falls on a Date and Time that CLINICAL, STAFF is not scheduled to work. Continue and schedule Appointment/Service on Staff's Time Off? Date: 11/11/2014 Time: 02:00 PM - 01:45 PM
	Yes No

NOTE: A scheduled non-recurring Appointment Event cannot be edited to become a recurring Appointment Event



RESOLVE/UNRESOLVE APPOINTMENT EVENT

When an event is resolved, that indicates that the event took place. Events on future dates cannot be resolved. It is a program decision as to whether or not they resolve appointment events.

There are two ways to resolve an appointment:

- Single click on the desired appointment on the calendar so that it is highlighted, and click the red check icon –or–
- Right click on the desired appointment on the calendar so that the drop down menu appears, and click "Resolve"



• The Appointment window opens. Click "Resolve", and then click "Cancel"

Enter Appointment for : CLINICAL, STAFF (Administrative Access)					
Event Save MClear X Del Save Sector Log	<u>_x</u>]Ca <u>n</u>				
A This Recurring Appointment Occur Resolve the Appointment					

• The event displays on the calendar with a pink check

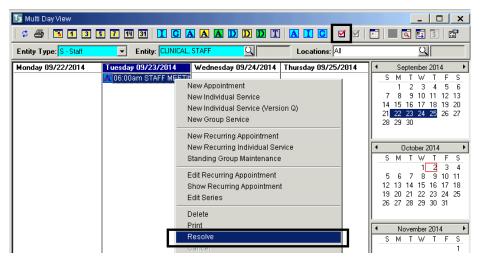
🜆 Multi Day View			
🛱 🎒 🖪 🖪	5 7 14 31 I C Z		A I C V V
Entity Type: S - Staff	Entity: CLINICAL,	STAFF Q	Locations: All
Monday 09/22/2014	Tuesday 09/23/2014	Wednesday 09/24/2014	Thursday 09/25/2014
Monday 09/22/2014	Tuesday 09/23/2014		Thursday 09/25/2014

- Scheduler
- NOTE: If the event does not display on the calendar, check the "View Options" to ensure the "Display Resolved Services" box is checked

The only reason you would unresolve, is if you resolved by mistake.

There are two ways to unresolve an appointment:

- Single click on the desired appointment on the calendar so that it is highlighted, and click the red check icon
- Right click on the desired appointment on the calendar so that the drop down menu appears, and click "Resolve"



• The appointment window opens. Click "Unresolve", and then click "Cancel"

Enter Appointment for : CLINICAL, STAFF (Administrative Access)						
Event Save XClear XDel Unres Svent Event Log	_ x ∫Ca <u>n</u>					
A This Recurring Resolved Appointment Occurred in the Past.						

• The event displays on the calendar without a pink check

🜆 Multi Day View			
🛱 🥔 🖪 🖪 🕄	5 7 19 31 I C A		A I C Ø Ø
Entity Type: S - Staff	Entity: CLINICAL,	STAFF Q	Locations: All
Monday 09/22/2014	Tuesday 09/23/2014	Wednesday 09/24/2014	Thursday 09/25/2014
Monday 09/22/2014			Thursday 09/25/2014

Scheduler

APPOINTMENT EVENT LOG

The Event Log records the creator of an event and tracks the last change by date, time, and staff person. It also documents the cancellation reason by date, time, and staff person. The Event Log can be accessed from within any scheduled event. If the program wishes to track every change that occurs to a scheduled event, staff can enter a comment in the "Comment" section of the event.

• Open the appointment window either by double clicking on the appointment, or by right clicking and choosing "Edit Appointment" or "Show Appointment" from the drop down menu

🚺 Multi Day View								
🗢 🎒 🖪 1 3 5 7 14 34 I C A A A D D D T A I C 🗹 🗹 🖬 🗔 🔄 🖆								
Entity Type: S - Staff Entity: CLINICAL, STAFF Q Locations: All Q								
Sun	Mon	Tue	Wed	Thu	Fri 10/31/2014	September 2014		
				№ 10:00 AM-03:0	New New New New Stand	Appointment Individual Service Individual Service (Version Q) Group Service Recurring Appointment Recurring Individual Service ding Group Maintenance		
					Show	/ Appointment /e		

Click "Event Log"



• The tracking information displays. *NOTE: Cancellation information will only display if the event was cancelled*

Event Log	×
Event Logging Information	
Staff/Date/Time Event Created	
Staff SCHEDULER, STAFF	
Date/Time 09/24/2014 03:46:00 PM	
Staff/Date/Time Event Last Modified	
Staff SCHEDULER, STAFF	
Date/Time 09/24/2014 03:54:31 PM	
Staff/Date/Time Service Canceled	
Staff	0
Date/Time / /	
Cancellation Reason	
	X Ca <u>n</u> cel

- Click "CANCEL"
- Click "Cancel" to return to the calendar

Enter Appointment for : CLINICAL, STAFF (Full Access)	×
. Event Save XClear XDel I Resolve APrint Print Log	×(Can

Scheduler

PRINTING AN APPOINTMENT SHEET

When an appointment event has been saved, it then can be printed. Single click the appointment so that it is highlighted, and click the print icon at the top of the window.

I	I₃ Multi Day View ≠ ▲ I I I I I I I I I I I D D T A I I I I I I I I I I I I I I I I I I						
	Entity Type: S - S	Staff 📃 💌	Entity: CLINICAL	, STAFF	Loc	ations: All	
Î	Sun	Mon	Tue	Wed	Thu	Fri 10/31/2014	
- 118		MOI	IUC	weu	Inu	FII 10/31/2014	
				weu		A 11:00am coffee	

You can also print by right clicking on the appointment and selecting either "Edit Appointment" or "Show Appointment" from the drop down menu

I Multi Day ViewX								
Entity Type: S · Staff Entity: CLINICAL, STAFF Q Locations: All Q								
Sun	Mon	Tue	Wed	Thu [10:00 AM	New Indi New Indi New Gro New Red New Red	September 2014 pointment ividual Service ividual Service (Version Q) up Service curring Appointment curring Individual Service g Group Maintenance		
					Edit App Show Ap Delete	ointment pointment		

• The "Enter Appointment for [Staff Person's Name]" window appears. Click "Print"

Enter Appointment for : CLINICAL, STAFF (Full Access)							
E	Event	Cloar	Y Del	D ecelve	/= Print	Event Log	wiCon
	H Save	Star Ciear	<u>∧ D</u> ei	<u>M</u> esolve	⊜ <u>P</u> nnt	≣ <mark>9</mark> Eve <u>n</u> t rog	<u> </u>

RECURRING APPOINTMENT EVENT

• Right click in the column of the day to be scheduled, and click "New Recurring Appointment" from the drop down menu

🜆 Multi Day View		_ _ ×					
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Entity Type: S - Staff	Entity: CLINICAL, STAFF C Location	tions: 🕅 🔍					
Sunday 10/05/2014	Monday 10/06/2014 Tuesday 10/07/201						
	New Appointment New Individual Service New Individual Service (Version Q) New Group Service	EST MED SERVIC S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30					
	New Recurring Appointment New Recurring Individual Service Standing Group Maintenance Payment	October 2014 S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 1					

- A "Rules of Recurrence" screen appears. Complete the prompts by entering the appropriate information. The "Start Date" of the recurring appointment must be the date of the first scheduled appointment
- Click "Build"

Rules of Recurrence	×
Start Time: 6:00 PM Duration 1:00 End Time: 7:00	PM
○ Daily Recur Every 1 week(s) on: ● Weekly □ Sunday ✓ Monday □ Tuesday □ Wedde ○ Monthly □ Thursday □ Friday □ Saturday	nesday
Start Date: 10/06/2014 C End After C End By / /	es (
<u>B</u> uild Clear	Cancel

• The "Enter Appointment for [Staff Person's Name]" screen appears. Complete prompts by entering the appropriate information

	Enter App	pointment fo	or : CLINIC/	AL, STAFF (Adm	iinistrative A	ccess)				×
	ivent <mark></mark>	₩C <u>l</u> ear	× <u>D</u> el	⊠ <u>R</u> esolve	<i>■</i> <u>P</u> rint	Eve <u>n</u> t Log			x]Ca	a <u>n</u>
		nis Recurring <i>i</i>	Appointment	has not been Sav	/ed.					
	Subject		TING						Private	
E	vent Type:	N - Normal	•	Start Date: 10	/06/2014		Time: 06:00 PM	Duratio	in: 1:00	
				End Date: 10	/06/2014	End	Time: 07:00 PM	Time Typ	e: B - Busy	•

- Enter the "Unit", "SubUnit", and "Location".
- Click "Save"

Enter Appointment for : CLINIC.	AL, STAFF (Administrative Access)		<u>></u>
Event Clear X Del	🗹 <u>R</u> esolve 🖉 <u>P</u> rint 📑 E	ve <u>n</u> t Log	<u>×</u> ∫Ca <u>n</u>
A This Recurring Appointment	has not been Saved.		
Subject: TEAM MEETING			Private
Event Type: N - Normal	Start Date: 10/06/2014 🔳	Start Time: 06:00 PM	Duration: 1:00
	End Date: 10/06/2014	End Time: 07:00 PM	Time Type: B - Busy 📃 💌
Unit: TRAINING UNIT	9900	SubUnit: TRAINING SUBU	INIT <u>9</u> 901
Location: HHSA MH BILLING UN	IT Q 1		
Comments			A
			~
Attendees			
🖥 Add 🛛 🔒 Edit 🛛 🗙 Del			

• The "Attendees" box is then activated. If desired, click "Add" to enter additional staff

Allondoo Ə Add						
Туре	Name	Start Date	End Date	Start Time	End Time	
S	CLINICAL, STAFF	10/06/2014	10/06/2014	06:00 PM	07:00 PM	
						-

• Enter additional staff in the "Staff" field and "Save"

Add Attende	es						×
Entity Type:	S - Staff			•			
Staff:	TEST, STAFF		<u>a</u>	013			
Event Type:	N - Normal	_					
	10/06/2014		Start Time: 06:00 PM		Durati	on: 1:00	
End Date:	10/06/2014		End Time: 07:00 PM	Т	'ime Tyj	pe: B - Busy	-
				 <u>S</u> a	ave	💥 C <u>l</u> ear	≍ Ca <u>n</u> cel

• Once finished, click "Cancel"

Enter Appointment for : CLINICAL, STAFF (Administrative Access)				
Event Bave XClear XDel I Resolve BPrint BEvent Log	<u>≭</u> Ca <u>n</u>			
A This Recurring Appointment will Occur in the Future.				



EDIT SERIES OF APPOINTMENT EVENTS

• To change an entire series that has already been scheduled, right click on any appointment in the series, and click "Edit Series"

🜆 Multi Day View							
🛱 🎒 🖪 🖪 🕄 🏹 👭 🛐 I G A A A D D D I A I G 🥑 🗹							
Entity Type: S - Staff	Entity: CLINICAL, STAFF	Locations: All					
Sunday 10/05/2014	Monday 10/06/2014	Tuesday 10/07/2014					
	A 06:00pm TEAM MEE	New Appointment New Individual Service New Individual Service (Version Q) New Group Service New Recurring Appointment New Recurring Individual Service Standing Group Maintenance Edit Recurring Appointment Show Recurring Appointment Edit Series					

• Check the box next to any appointment in the series, and click "Edit an Appointment"

Recurring Appointment (Full Access)							
Startdate	Day	Starttime	Endtime	Select 🔺			
10/06/2014	MONDAY	06:00 PM	07:00 PM	FB1			
10/13/2014	MONDAY	06:00 PM	07:00 PM				
10/20/2014	MONDAY	06:00 PM	07:00 PM				
10/27/2014	MONDAY	06:00 PM	07:00 PM				
11/03/2014	MONDAY	06:00 PM	07:00 PM				
				×			
Unresolved Only All Copy Date: Copy an Appointment Select All Faste Appointment Deselect All							
Jopy an Appoin	inent select All I	urraster Faste	Appointment	Deselect All			
Edit an Appointi	ment Recur App	ointment Delete S	Exit				

• Make the necessary change(s) and "Save"

NOTE: In this example, the time is being changed from 6:00-7:00 to 5:00-6:00

Enter Appointment for : CLINICAL, STAFF (Administrative Access)				
E.ont Save XClear XDel I Resolve APrint	Eve <u>n</u> t Log x Ca <u>n</u>			
A This Recurring Appointment will Occur in the Future.				

• "Proceed with Save" when you are asked to "Update all attendee and calendar records with new event time"

Update Attendee and Calendar Records?	×
Update all attendee and calendar records with	new event time
O Update only those attendee and calendar reco	rds whose time no longer falls within the new event time
	Proceed with Save Cancel Save

Click "Cancel"

Enter Appointment for : CLINICAL, STAFF (Administrative Access)				
Event Esave XClear XDel I Resolve Print EEEvent Log	<u>≭</u> ∫Ca <u>n</u>			
A This Recurring Appointment will Occur in the Future.				

- If you wish to make the same change to other appointments in the series:
 - Select you appointment to copy
 - "Copy an Appointment"
 - "Select All for Paste"
 - o "Paste Appointment"

Recurring App	ointment (Full Acc	ess)		×	Recurring Appo	ointment (Full Acc	ess)		×
Startdate	Day	Starttime	Endtime	Select 🔺	Startdate	Day	Starttime	Endtime	Select 🔺
10/06/2014	MONDAY	05:00 PM	06:00 PM		10/06/2014	MONDAY	05:00 PM	06:00 PM	
10/13/2014	MONDAY	06:00 PM	07:00 PM		10/13/2014	MONDAY	06:00 PM	07:00 PM	
10/20/2014	MONDAY	06:00 PM	07:00 PM		10/20/2014	MONDAY	06:00 PM	07:00 PM	
10/27/2014	MONDAY	06:00 PM	07:00 PM		10/27/2014	MONDAY	06:00 PM	07:00 PM	
11/03/2014	MONDAY	06:00 PM	07:00 PM		11/03/2014	MONDAY	06:00 PM	07:00 PM	
				-					•
Unresolver			Copy Date	e:	Unresolved		<u>)</u>		e: 10/13/2014
Copy an Appoin	_		ppointment	Deselect All	Copy an Appoint	ment Select All f	or Paste Paste	Appointment	Deselect All
Edit an Appoint	ment Recur Appo	pintment Delete S	elected Appts	Exit	Edit an Appointr	ment Recur App	ointment Delete S	elected Appts	Exit

• The entire series is then updated with the change. Click "Exit"

Recurring App	ointment (Full Acce	SS)		×
Startdate	Day	Starttime	Endtime	Select 🔺
10/06/2014	MONDAY	06:00 PM	07:00 PM	
10/13/2014	MONDAY	06:00 PM	07:00 PM	
10/20/2014	MONDAY	06:00 PM	07:00 PM	
10/27/2014	MONDAY	06:00 PM	07:00 PM	
11/03/2014	MONDAY	06:00 PM	07:00 PM	
				•
Unresolved Only C All Copy Date:				
Copy an Appoint	ment Select All for	Paste Pas	e Appointment	Deselect All
Edit an Appointr	ment Recur Appoir	ntment Deleta	e Selected Appts	Exit

RECUR EXPIRED APPOINTMENT EVENT

• If a recurring appointment is expiring, and you wish to add more occurrences to the series, right click on any appointment in the series, and click "Edit Series"

🚺 Multi Day View			_ _ X
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Entity Type: S - Staff	Entity: CLINICAL, STAFF	Locations: All	9
Sunday 10/05/2014	Monday 10/06/2014	Tuesday 10/07/2014 New Appointment New Individual Service New Individual Service (Version Q) New Group Service	MIC September 2014 S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 22 29 29 29
		New Recurring Appointment New Recurring Individual Service Standing Group Maintenance Edit Recurring Appointment Show Recurring Appointment Edit Series	28 29 30 ▲ October 2014 S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25

• Check the box next to the last appointment in the series, and click "Recur Appointment"

Recurring Appoir	itment (Full Access	3)		×	
Startdate	Day	Starttime	Endtime	Select 🔺	
10/06/2014	MONDAY	06:00 PM	07:00 PM		
10/13/2014	MONDAY	06:00 PM	07:00 PM		
10/20/2014	MONDAY	06:00 PM	07:00 PM		
10/27/2014	MONDAY	06:00 PM	07:00 PM		
11/03/2014	MONDAY	06:00 PM	07:00 PM		
	Unresolved Only All Copy Date:				
Copy an Appointme	ent Select All for Pa	aste 🛛 Paste Ap	pointment	Deselect All	
Edit an Appointme	nt Recur Appointm	nent Delete Sel	ected Appts	Exit	

• Set the Rules of Recurrence. Make sure the Start Date is the first day that is not already scheduled (otherwise duplicate appointments will appear). Click "Build"

Rules of Recurrence Start Time: 06:00 PM Duration 1:0	0 End Time: 07:00 PM				
Daily Every Days Every Weekday Monthly					
Start Date: 11/10/2014 📰 🗇 En	d After Coccurrences d By / / III				
	<u>B</u> uild Clear Ca <u>n</u> cel				

• "Exit" from the Rules of Recurrence

Startdate	Day	Start	time	Endtime	Selec	at 🔺
10/06/2014	MONDAY	06:00	PM	07:00 PM		
10/13/2014	MONDAY	06:00	PM	07:00 PM		
10/20/2014	MONDAY	06:00	PM	07:00 PM		
10/27/2014	MONDAY	06:00	PM	07:00 PM		
11/03/2014	MONDAY	06:00	PM	07:00 PM		
11/10/2014	MONDAY	06:00	PM	07:00 PM		
11/11/2014	TUESDAY	06:00	PM	07:00 PM		
11/12/2014	WEDNESDAY	06:00	PM	07:00 PM		
						•
Unresolved Only O All Copy Date:						
Copy an Appoin	tment Select All for	Paste	Paste A	ppointment	Deselec	st All
Edit an Appointment Recur App			Valata Ca	lected Appts	Exit	

DELETE ONE APPOINTMENT EVENT

• Right click on the desired appointment and click "Delete"

🌆 Multi Day View					_ 🗆	×
\$ 🞒 🖪 🖪 🕄 🖪 🖪	31 I G A A I	DDT A I	G 🗹 🗹	•	🔍 🔛 💿	r 🗗
Entity Type: S - Staff	Entity: CLINICAL, STAFF	Locatio	ons: All		의	
Sunday 10/05/2014	Monday 10/06/2014	Tuesday 10/07/201		•	September 2014	. •
	New Group S	ial Service ial Service (Version Q) Service	IT MED SERVIC	7 14 1 21 2		F S 5 6 12 13 19 20 26 27
	New Recurri	ng Appointment ng Individual Service oup Maintenance		 ▲ 	October 2014 M T W T	F S
		ng Appointment ring Appointment	-	19 2	6 7 8 9 1 3 14 15 16 1 20 21 22 23 2 27 28 29 30 3	3 4 10 11 17 18 24 25 31
	Delete Driet Resolve		J	•	November 2014 M T W T	

DELETE SERIES OF APPOINTMENT EVENTS

• Right click on any appointment in the series, and click "Edit Series"

🗾 Multi Day View				<u> </u>
🛱 🎒 🖪 🖪 🕄 🕇 👖	31 I G A A A	DDDT AIG 🗹	2	🛅 🔳 🖾 🛄 🗊 😭
Entity Type: S - Staff	Entity: CLINICAL, STAFF	Locations: All		<u> </u>
Sunday 10/05/2014	Monday 10/06/2014	Tuesday 10/07/2014		✓ September 2014
	A 06:00pm TEAM MEETIN	New Appointment New Individual Service New Individual Service (Version Q) New Group Service New Recurring Appointment New Recurring Individual Service		S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30
		Standing Group Maintenance Edit Recurring Appointment Show Recurring Appointment Edit Series		Image: October 2014 Image: October 2014 S M T W T F S 1 2 3 4 S 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25

• Check the boxes next to the desired appointments, and click "Delete Selected Appts"

Startdate	Day	Starttime	Endtime	Select 🔺	
10/06/2014	MONDAY	06:00 PM	07:00 PM		
10/13/2014	MONDAY	06:00 PM	07:00 PM		
10/20/2014	MONDAY	06:00 PM	07:00 PM		
10/27/2014	MONDAY	06:00 PM	07:00 PM		
11/03/2014	MONDAY	06:00 PM	07:00 PM		
11/10/2014	MONDAY	06:00 PM	07:00 PM		
11/11/2014	TUESDAY	06:00 PM	07:00 PM		
11/12/2014	WEDNESDAY	06:00 PM	07:00 PM		
Unresolved Only O All Copy Date: Copy an Appointment Select All for Paste Paste Appointment Deselect All					

• They are then removed from the series. Click "Exit"

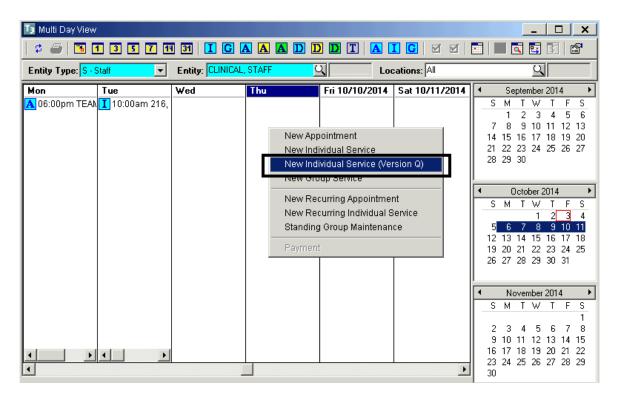
Startdate	Day	Startt	ime	Endtime	Select	-
10/06/2014	MONDAY	06:00	PM	07:00 PM		
10/13/2014	MONDAY	06:00	PM	07:00 PM		
10/20/2014	MONDAY	06:00	PM	07:00 PM		
10/27/2014	MONDAY	06:00	PM	07:00 PM		
11/03/2014	MONDAY	06:00	PM	07:00 PM		
11/10/2014	MONDAY	06:00	PM	07:00 PM		
11/11/2014	TUESDAY	06:00	PM	07:00 PM		
11/12/2014	WEDNESDAY	06:00	PM	07:00 PM		0
Our Unresolver	d Only 🔿 All			Сору [)ate:	
Copy an Appoin	tment Select All for	Paste	Paste Ap	pointment	Deselect /	All
Edit an Appoint	ment Recur Appoir	atment D	elete Sel	ected Appts	Exit	

Scheduler

VERSION Q

Version Q has fewer fields to complete than the individual client service screen. Version Q does not allow for the scheduling of a collateral server, comments cannot be added, and when Version Q service events are edited, they are done so in the individual client service screen.

• Right click in the open white area below the day you wish to schedule and click "New Individual Service (Version Q)" from the drop down menu



- A. The "Subject" can be manually entered, or it can be left blank. If it is left blank, it will default to the service code description after selecting the service code
- B. Enter the "Start Time". The system will default to "am." Either enter military time, or the letter "p" for pm. For duration, enter as H:MM (i.e. forty-five minutes is :45 and one hour and fifteen minutes is 1:15). The system will calculate the "End Time" automatically
- C. Select the client from the "Client Look Up" screen
- D. When the "Unit" is entered, the "Location" field automatically fills. Enter the Sub Unit



E. The "Staff" field defaults to the entity selected when you originally right clicked on the Multi Day View; however, the staff person can be changed

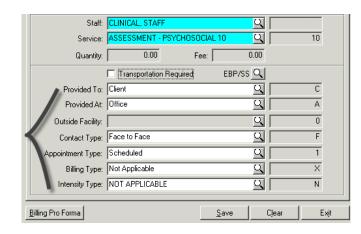
dividual Service Entry	(Version Q)			×
Subject: Translate	or needed for client	A)		
Date:	10/09/2014	Start	Time: 12:00 PM	
		Dur	ation: 1:15	<u> </u>
		Stop	Time: 1:15 PM	
Client:				0
Q Unit:	TRAINING UNIT			9900
Sub Unit:	TRAINING SUBUNIT			9901
Location:	TRAINING LOCATION01		<u>a</u>	9999
Staff:	CLINICAL, STAFF			
Service:			<u>a</u>	0
Quantity:	0.00	Fee:	0.00	
	Transportation Require	d EBP/SS		
Provided To:			<u>q</u>	
Provided At:			<u>q</u>	
Outside Facility:			<u>q</u>	0
Contact Type:			<u>q</u>	
Appointment Type:			9	0
Billing Type:			<u>q</u>	
Intensity Type:			9	
Billing Pro Forma		Save	Clear	Exit

• From the drop down menu, select the intended Service Code for the service event

📑 Service Co	odes Lookup 🛛 🕺					
ID	Desc					
5	CREENING 5					
9	SSESSMNT PSYCHSOC INTERACT 9					
10	SSESSMENT - PSYCHOSOCIAL 10					
11	MEDICATION EVALUATION 11					
12	PSYCHOLOGICAL TESTING 12					
13	PLAN DEVELOPMENT 13					
14	EVAL OF RECRD FOR ASSESSMNT 14					
15	15 EXTERNAL REPORT PREPARATION 15					
16	PSYCH TEST-TECHNICIAN 16					
1						
 Active 	C Inactive C All <u>F</u> ind <u>D</u> K Cancel					



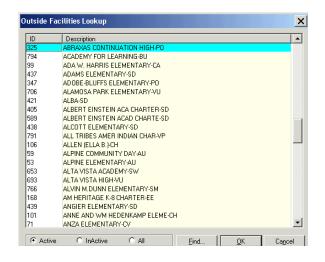
• Once a service code is selected, the service indicators auto fill



• If the place of service is different than the default for "Prov. At", enter the correct "Provided At" from the "Place of Service" look-up

ID	Description	Alternate ID	
J	Client Job Site	7	
С	Correctional Facility	8	
L	Crisis Residential	1	
F	Faith Based (church)	f	
G	Health Care - Primary Care	g	
Н	Home	2	
E	Homeless/Emerg Shelter	5	
ĸ	IP Free Stdng Hosp/IMD/SH	6	
D	IP Full Scale Hosp/SNF	9	
ΘA	ctive O InActive O All		

• Enter an "Outside Facility" if "K", "D", or an "S" is selected as the place of service

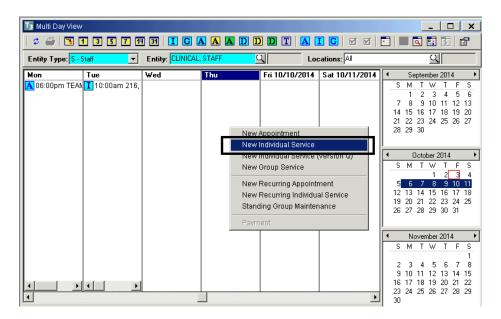


	Transportation Required EBP/	ss 🔍	
Provided To:	Client	<u> </u>	С
Provided At:	School	<u>q</u>	S
Outside Facility:	COMMUNITY SCHOOLS - CENTRAL-OE	9	33
Contact Type:	Face to Face	<u>q</u>	F
Appointment Type:	Scheduled	্র 📃	1
Billing Type:	Not Applicable	্র 📃	×
Intensity Type:	NOT APPLICABLE	<u> </u>	N
illing Pro Forma	<u>S</u> ave	Clear	Ex <u>i</u> t

• The other indicators can be changed if desired. Click "Save"

INDIVIDUAL SERVICE EVENT WITH A COLLATERAL SERVER

• Right click in the column of the day to be scheduled and click "New Individual Service" from the drop down menu



 The "Add/Edit Individual Service Scheduled for [Staff Person's Name]" screen appears

Add/Edit Ind	ividual	Service So	cheduled fo	r CLINICAL,	STAFF (Administr	ative Ac	cess)				×
Event	I	This Norma	al Eivent has i	not been Save	d.							
Subject:										Pr	e-Payment 🛛	0.00
Date:	10/08	/2014 🔳		Start Time:				Durat	ion:	:	Stop Time: 📘	
Client:				Q	0	Locat	ion: 📘				<u>q</u>	
🔍 Unit:				Q		Comm	ient:					A
Sub Unit:				<u>q</u>								-
									Save	Delete	Clear	Coll. Svrs
Services	Even	: Does Not E	xist.									
	Staff			(Service			Start	Time Enc	ITime F	Resolved C	anceled 🔺
Created										(]
Not												
Created					1			1			1	
	. € Sc	cheduled	C Actua	Resolve S	iervice	Cancel S	ervice	Add Uns	cheduled	Add	Delete	Clear
Form #:		0	Date: 📝	/	1						🔲 C. Serv	/ers
Staff:				Q		Supe	ervisor:				<u>_</u>	
Unit				Q		Assig	nment	Unit		SubUn	it	
Sub Unit				<u>u</u>								
Service:				Q		s	. Start:		Duration:		Stop:	
Lab:				U		T	Start:		Duration:		Stop:	
Days:		Quan: 🗍	0.00 Fee:	0.00	Part	0 D	. Start:		Duration:		Stop:	
	🗖 Tra	ansportation	Reqd	EBP/SS		Pro	ov. To:				Q	
Prov. At:				g			t. Fac:				q	
Con.Type:				q			.Type:				q	-
Bill. Type:				Q		Int	Type:				Q	
Post/Save	Service	Billing E	ro Forma					Event Log	Prin		Payment	Exit

Scheduler

• Complete the necessary information in the top container and click "Save"

Add/Edit Inc	lividual Service Sch	eduled for CLINICAL, STAFF (Adr	ninistrative	Access)				×
Event	This Normal E	ivent has not been Saved.						
Subject:						Pre-P	ayment 🗌	0.00
Date:	10/05/2014 🔳	Start Time: 1:00 PM		Duration:	1:45	Sto	p Time: [:45 PM
Client:	FAKE, TEST	Q	Location:	TRAINING LOCAT	TON		<u> </u>	
Unit:	TRAINING UNIT	9900	Comment:					A
Sub Unit:	TRAINING SUBUNIT	<u>_</u> 9901		<u> </u>				~
				S	iave	Delete	Clear	Coll. Svrs

• The Collateral Server button and the bottom container activate. Click the "Coll. Svrs" button

Add/Edit Inc	lividual Service Scheduled f	or CLINICAL, STAFF (Adm	ninistrative	Access)		×
Event	This Normal Event has	: not been Saved.				
Subject:					Pre-Payment	0.00
Date:	10/05/2014 🔳	Start Time: 1:00 PM		Duration: 1:45	Stop Time:	2:45 PM
Client:	FAKE, TEST	<u>q</u>	Location:	TRAINING LOCATION	의	
🔍 Unit:	TRAINING UNIT	9900	Comment:			A
Sub Unit:	TRAINING SUBUNIT	 9901		<u> </u>		~
				Save	Delete Clear	Coll. Svrs

• Enter the necessary information for the collateral server(s), press the tab key on the keyboard until the next row becomes active, and click "Exit"

Staff >>		Start Time	Duration	End Time	Clea
2 CUTOVER ST	AFF	01:00 PM	1:45	2:45 PM	
					Dele

Add/Edit Indi	vidual Service Scheduled for CLIN This Normal Event has not beer		dministrative A	ccess)	×
Subject:			_		Pre-Payment 0.00
		Time: 1:00 PM		Duration: 1:45	Stop Time: 2:45 PM
	FAKE, TEST	<u>a</u>		RAINING LOCATION	
	TRAINING UNIT	990	0 Comment:		<u>^</u>
Sub Unit:	TRAINING SUBUNIT	9901			<u> </u>
				Save De	lete Clear Coll. Svrs
Services	Adding New Scheduled Service.				
	Staff	Service		Start Time End Time	Resolved Canceled
Created					
Not Not					
Created					
	Scheduled C Actual Rel	solve Service	Cancel Service	Add Unscheduled Ad	d Delete Clear
Form #:	0 Date: 10/05/201	4 🔳			C. Servers
Staff:	CLINICAL, STAFF		Supervisor:		<u>q</u>
Unit:	TRAINING UNIT		00 Assignment:	Unit Sub	Unit 📩 📥
Sub Unit:	TRAINING SUBUNIT	9901	_	9900 - TRAINING UNIT 9901	
	CASE MGT/ BROKERAGE 50		50 S. Start:	1:00 PM Duration: 1:45	Stop: 2:45 PM
Lab:		<u> </u>	0 T. Start:	Duration:	Stop:
Days:	, 0 Quan: 0.00 Fee:	0.00 Part:	0 D. Start:	Duration:	Stop:
,		i aicij	-	Client	
	L Transportation Bend EBP/SS		1107.10.		~
Prov. At:	Transportation Reqd EBP/SS		Out. Fac:		
Prov. At: Con.Type:	Iransportation Regd EBP/55	· 	_	Scheduled	

Billing Pro Forma

Post/Save Service

• Enter the necessary information in the bottom container, click "Post/Save Service", and click "Exit"

Scheduler

Event Log

<u>P</u>rint

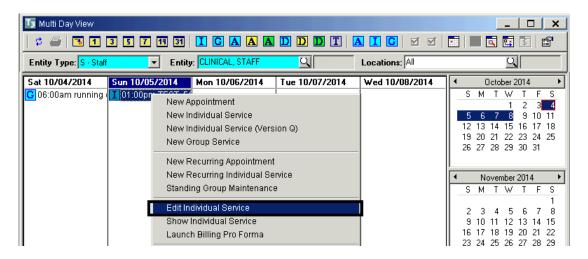
Payment

Exit

Scheduler

EDIT SERVICE EVENT

• Right click on the individual service event to be edited. Click "Edit Individual Service" from the drop down menu



• The "Add/Edit Individual Service for [Staff Member's Name]" screen appears. Make the appropriate changes in the top container, "Save". Make the appropriate changes in the bottom container, and click "Post/Save Service"

Add/Edit Inc	lividua	Service Schedu	uled for (CLINICAL, S	TAFF	(Adm	inistrative	Acce	ss)					×
Event	Ι	This Normal Eve	<mark>nt has no</mark>	t been Saveo										
Subject:	CASE	MGT/ BROKERA	GE 50									Pre-Paymer	it 🗌	0.00
Date:	10/05	/2014 🔲		Start Time: 🧧	:00 PM	1			Duratio	on: 1:45		Stop Time	2:45	PM
Client:	FAKE.	TEST		Q			Location:	TRAI	VING LO	CATION		Q		
S Office		IING UNIT		Q	9	9900	Comment:							
Sub Unit:	TRAIN	IING SUBUNIT		Q	9901									~
										Save	De	lete 📔 Cie	ar C	Coll. Svrs
Services	Editin	g Server/Service.												
	Staf				Service	;			Start T	ime End	Time	Resolved	Cance	led 🔺
Created		CLINIC.	AL STA	AFF (50) CAS	E MG	T7 BROKE	RAGE	01:00 F	PM 02:45	PM			
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	• 5	cheduled C	Actual	Resolve Se	ervice	La	ncel Servic	e	aa Unsc	nequied	Ad		ste	Clear
Form #:		0 Da	te: 10/0)5/2014 =								🗖 C. S	Servers	
Staff:	CLIN	CAL, STAFF		Q			Superviso	or: 🔽					Q	
Unit	TRAI	NING UNIT		Q		9900	Assignme		nit			oUnit	Í	a a l
Sub Unit:	TRAI	NING SUBUNIT		Q	9901			99	00 - TRA	INING UNI	T 9901	- TRAINING	SUBI	
Service:	CASE	MGT/ BROKERA	AGE 50	Q		50	S. Star	rt: <mark>1:0</mark>	0 PM	Duration:	1:45	Stop: 2:	45 PM	
Lab:				<u>_</u>		0	T. Star	rt: 🔽		Duration: [Stop:		Ī .
Days:		Quan: 0.00	Fee:	0.00	Part:	0	D. Sta	rt: 📃		Duration:		Stop:		
	Tr 🗌	ansportation Regd	EE	BP/SS			Prov. To	o: Clie	ent				모미	
Prov. At:				<u>q</u>			Out. Fai						의	0
Con.Type:	<u> </u>			<u>q</u>			Appt.Type		heduled				<u> </u>	1
Bill. Type:	Not A	pplicable		Q	JХ		Int. Typ	e: NC)T APPL	ICABLE			QN	
P <u>o</u> st/Save	Servic	e Billing Pro Fo	rma					Eve	ent <u>L</u> og	Print	1	Payment	1	Exit

• The "Update Attendee and Calendar Records?" dialog box appears. Click "Proceed with Save".



• Click "Exit"

Transportation Regd	EBP/SS	Prov. To:	Client	K	IC.
Prov. At:	এ	Out. Fac:		<u>(</u>	<u>ا ا</u>
Con.Type:	<u>a</u>	Appt.Type:	Scheduled	<u> </u>	<u>الم</u>
Bill. Type: Not Applicable	<u>a</u> x	Int. Type:	NOT APPLICABLE	<u> </u>	A N
Post/Save Service Billing Pro Forma			Event <u>L</u> og <u>P</u> rint	Payment	Exit

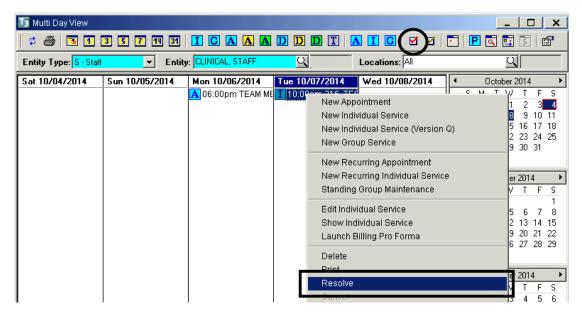
NOTE- A scheduled non-recurring Individual Service cannot be edited to become a recurring event

RESOLVE/UNRESOLVE INDIVIDUAL SERVICE EVENT

When an event is resolved, that indicates that the event took place. Events on future dates cannot be resolved. NOTE: SDCMHS policy regarding scheduled events is that service events that actually occurred shall be resolved. Service events that did not occur shall not be resolved.

There are two ways to resolve an individual service event:

- Single click on the desired individual service event on the calendar so that it is highlighted, and click the red check icon -or-
- Right click on the desired appointment on the calendar so that the drop down menu appears, and click "Resolve"



• The "Add/Edit Individual Service Scheduled for [Staff Member Name]" window opens. Click "Resolve Service"

Services	Editing Serv	ver/Service.				_				
	Staff			Service		Start Time	End Time	Resolved	Canceled	
Created		CLINICAL, STAFF	(50) CASE	E MGT7 BROKERAG	iE 01:00 PM	02:45 PM			
Not Created										•
	Schedu	led C Actual	Resolve Se	ervice	Cancel Service	Add Unschedu	led Add	d Dele	e te Clea	ar

- Scheduler
- A pink check box appears in the resolved column of the middle container

Services	Displaying \$	Scheduled Service for Server.		_				
	Staff		Service	Start Time	End Time	Recolved	Canceled	
Created		CLINICAL, STAFF	(50) CASE MGT/ BROKERAGE	01:00 PM	02:45 PM			
Not Created						Ŭ		•
	Schedu	led C Actual Unresol	e Service Cancel Service A	dd Unschedul	ed Ad	d Dele	e te Clea	ar

• Click "Exit"

, , Transportation Regd	EBP/SS	Prov. To:	Client		
Prov. At:		Out. Fac:			
Con.Type:	<u>q</u>	Appt.Type:	Scheduled		
Bill. Type: Not Applicable	<u>q</u> x	Int. Type:	NOT APPLICABLE		
				,	
Post/Save Service Billing Pro Forma		_	Event <u>L</u> og <u>P</u> rint	Payment	Exit
8			1		

• The event displays on the calendar with a pink check

🌆 Multi Day View			
🕴 🧉 🖪 🖪	5 7 14 31 I G) A I G Ø Ø
Entity Type: S - Staff	Entity: CLINICA	L, STAFF	Locations: All
Tuesday 09/30/2014		Thursday 10/02/2014	Friday 10/03/2014
Tuesday 09/30/2014	Wednesday 10/01/2014	-	Friday 10/03/2014
Tuesday 09/30/2014		-	Friday 10/03/2014

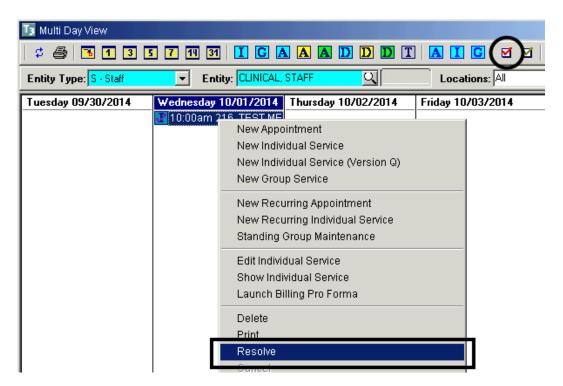
NOTE: If the event does not display on the calendar, check the "View Options" to ensure the "Display Resolved Services" box is checked

Scheduler

The only reason you would unresolve, is if you resolved by mistake.

There are two ways to unresolve an individual service event:

- Single click on the desired appointment on the calendar so that it is highlighted, and click the red check icon –or–
- Right click on the desired appointment on the calendar so that the drop down menu appears, and click "Resolve"



• The "Add/Edit Individual Service Scheduled for [Staff Member Name]" window opens. Click "Unresolve Service"

	Staff		Service	Start Time	End Time	Resolved	Canceled 🔺
Created		CLINICAL, STAFF	(50) CASE MGT/ BROKERAGE	01:00 PM	02:45 PM	2	
Not Created							-

• The pink check box that was in the resolved column of the middle container disappears

Services	Editing Ser	ver/Service.				_				
	Staff			Service		Start Time	End Time	newlyed	Canceled	
Created Not Created		CLINICAL, STAFF]	50) CASE	MGT/ BROKERAG	E 01:00 PM	02:45 PM		• •	- -
	Schedu	led C Actual	Resolve Se	rvice	Cancel Service /	Add Unschedu	led Ad	d Dele	e te Cle	ar

• Click "Exit"

Transportation Regd	EBP/SS	Prov. To:	Client		}	য়
Prov. At:	য	Out. Fac:			9	<u> </u>
Con.Type:	뫼	Appt.Type:	Scheduled		}	य 1
Bill. Type: Not Applicable	<u>q</u> x	Int. Type:	NOT APPLIC	CABLE	Ş	A N
Post/Save Service Billing Pro Forma			Event <u>L</u> og	<u>P</u> rint	Payment	Exit
3 1.111						

The event displays on the calendar without a pink check

🜆 Multi Day View			
📫 🗳 🖪 🖪 🗷	5 7 14 31 I G /		A I C 0 0
Entity Type: <mark>S - Staff</mark>	Entity: CLINICAL,	STAFF Q	Locations: All
Tuesday 09/30/2014	Wednesday 10/01/2014 10:00am 216, TEST ME	_	Friday 10/03/2014
Tuesday 09/30/2014		_	Friday 10/03/2014

CANCEL/UNCANCEL

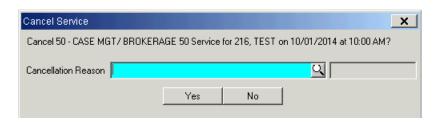
• Right click on the individual service event you wish to cancel, and from the drop down menu, click "Cancel"

🜆 Multi Day View				_
🕴 🗳 🖪 🖪 🖪] 77 111 31 I G (A A D	DDT A I C V V	🖭 🖾 🖸
Entity Type: S · Staff	Entity: CLINICAL	"STAFF	Locations: All	ſ
Wednesday 09/24/2014	Thursday 09/25/2014	Friday 09/26/2	2014 Saturday 09/27/2014	 Septemb
		1 05:00pm 21	New Appointment New Individual Service New Individual Service (Version Q) New Group Service New Recurring Appointment New Recurring Individual Service Standing Group Maintenance Edit Recurring Individual Service Show Recurring Individual Service Edit Recurring Individual Service Edit Series Launch Billing Pro Forma Delete Print Resolve Cancel	T V 2 9 1 16 1 23 2 80 2tobe T V 7 14 1 21 2 28 2 28 2 2 28 2 2 28 2

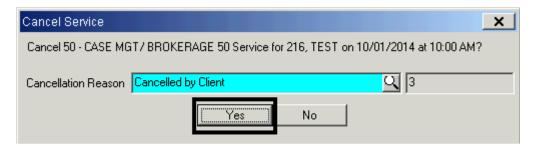
• In the middle container, click "Cancel Service"

Services	Editing Serv	ver/Service.			_				
	Staff		Service		Start Time	End Time	Resolved	Canceled	
Created		CLINICAL, STAFF	(50) CASE	MGT/ BROKERAGE	01:00 PM	02:45 PM			
Not Created									•
	Schedu	led C Actual Reso	lve Service	Cancel Service	dd Unschedul	ed Add	I Dele	te Clea	ar

• The "Cancel Service" dialog box appears. Click the magnifying glass to access the "Cancellation Reason" table



• Once a cancellation reason is selected, click "Yes"



• Click "Exit"

Transportation Regd	EBP/SS	Prov. To:	Client	}	য়াল
Prov. At:	의	Out. Fac:		<u>j</u>	A 0
Con.Type:	의	Appt.Type:	Scheduled	5	A 1
Bill. Type: Not Applicable	<u>q</u> x	Int. Type:	NOT APPLICABLE	j.	A N
Post/Save Service Billing Pro Forma			Event Log Print	Payment	Exit
8 111					

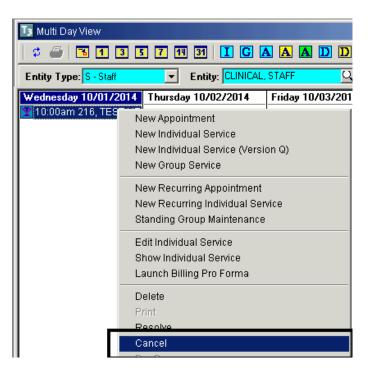
• The cancelled Individual Service Event displays on the calendar with a pink X

🜆 Multi Day View					
🗢 🥌 🖪 🖪 🖪	• 7 14 31 I G 🛛				
Entity Type: S - Staff 💽 Entity: CLINICAL, STAFF Q					
Endly Type: 5 Stan	Entry: CENTIONE				
Wednesday 10/01/2014		Friday 10/03/2014			
	Thursday 10/02/2014	,			

NOTE: If the event does not display on the calendar, check the "View Options" to ensure the "Display Cancelled Services" box is checked

NOTE: The only reason you would uncancel is if you cancelled by mistake

• Right click on the service you wish to uncancel, and from the drop down menu, click "Cancel"



• Click the "Uncancel Service" button in the middle container

Editing Serv	ver/Service.							
Staff		Servic	e	Start Time	End Time	Resolved	Canceled	
	CLINICAL, STAFF	(50) CA	SE MGT7 BROKERAGE	01:00 PM	02:45 PM		2	
								_
Schedu	ed C Actual	Resolve Service	Uncancel Service	dd Unschedul	ed Ado	d Dele	e te Clea	ar
	Staff	CLINICAL, STAFF	Staff Servic	Staff Service CLINICAL, STAFF (50) CASE MGT/ BROKERAGE	Staff Service Start Time CLINICAL, STAFF (50) CASE MGT/ BROKERAGE 01:00 PM	Staff Service Start Time End Time CLINICAL, STAFF (50) CASE MGT / BROKERAGE 01:00 PM 02:45 PM	Staff Service Start Time End Time Resolved CLINICAL, STAFF (50) CASE MGT/ BROKERAGE 01:00 PM 02:45 PM Image: Comparison of the service	Staff Service Start Time End Time Resolved Canceled CLINICAL, STAFF (50) CASE MGT/ BROKERAGE 01:00 PM 02:45 PM Image: Conceled

• Click "Exit" to return to the schedule

Transportation Regd	EBP/SS	Prov. To:	Client			QC	
Prov. At	의	Out. Fac:				এ 📃	0
Con.Type:	의	Appt.Type:	Scheduled			ব 📃	1
Bill. Type: Not Applicable	<u>q</u> x	Int. Type:	NOT APPLIC	ABLE		Q N	
Post/Save Service Billing Pro Forma			Event <u>L</u> og	<u>P</u> rint	Payment	Exit	

Scheduler

• The service event appears on the Multi Day View screen without the pink X

🌆 Multi Day View			
🗢 🧉 🖪 🖪	I 7 11 31 I C A		A I C Ø Ø
Entity Type: S - Staff	Entity: CLINICAL,	STAFF Q	Locations: All
Tuesday 09/30/2014	Wednesday 10/01/2014		Friday 10/03/2014
	10:00am 216, TEST ME		

CHECK IN/CHECK OUT

There are two ways to indicate that a client has arrived for the service event:

- Single click on the desired appointment on the calendar so that it is highlighted, and click the green check icon –or–
- Right click on the desired appointment on the calendar so that the drop down menu appears, and click "Check In"

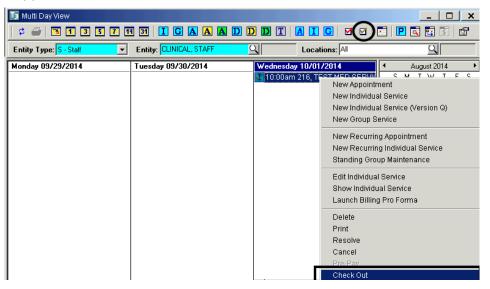
🌆 Multi Day View				
\$ # 3 1 3 5 7	11 31 I G A A A	DDD	I 🛛 I C 🗹 🗹 🗖	🖪 🖾 📑
Entity Type: S - Staff 🛛 💌	Entity: CLINICAL, STAFF	<u>a</u>	Locations: All	<u>q</u>
Monday 09/29/2014	Tuesday 09/30/2014		esday 10/01/2014 Marc 216 TEST MED SERVIN New Appointment New Individual Service New Individual Service New Group Service New Recurring Appointment New Recurring Individual Servi Standing Group Maintenance Edit Individual Service Show Individual Service Launch Billing Pro Forma Delete Print Resolve	
			Cancel Pre-Pav Check In	

• A green check mark appears next to the event

🜆 Multi Day View		
\$ 🛎 1 3 5 7 1	🖽 31 I G A A A D I	
Entity Type: S - Staff 📃 💌	Entity: CLINICAL, STAFF	Locations: All
	-	-
Monday 09/29/2014	Tuesday 09/30/2014	Wednesday 10/01/2014
Monday 09/29/2014	Tuesday 09/30/2014	Wednesday 10/01/2014 10:00am 216, TEST MED SERVIC
Monday 09/29/2014	Tuesday 09/30/2014	
Monday 09/29/2014	Tuesday 09/30/2014	

There are two ways to indicate that the client has checked out:

- Single click on the desired appointment on the calendar so that it is highlighted, and click the green check icon –or–
- Right click on the desired appointment on the calendar so that the drop down menu appears, and click "Check Out".



• The green check mark next to the event disappears

🜆 Multi Day View		
\$ 🖨 🖪 🖪 🖪 🔽	14 31 I G A A D I	
Entity Type: S - Staff 🛛 💌	Entity: CLINICAL, STAFF	Locations: All
Monday 09/29/2014	Tuesday 09/30/2014	Wednesday 10/01/2014
Monday 09/29/2014	Tuesday 09/30/2014	Wednesday 10/01/2014 10:00am 216, TEST MED SERVI
Monday 09/29/2014	Tuesday 09/30/2014	

Scheduler

BILLING PRO FORMA

• To see how a scheduled service will be billed to the client's pay source(s), right click on the desired service and click "Launch Billing Pro Forma"

🜆 Multi Day View			_ □
🕴 😂 🖪 🖪 🖪 🖪] 14 31 I G A A A I) D D T A I G I I .] 🖻 🕵 🚉 🗊 🖆
Entity Type: S - Staff	Entity: CLINICAL, STAFF	Locations: All	9
Friday 09/12/2014	Saturday 09/13/2014	Sunday 09/14/2014 05:0 New Appointment New Individual Service New Individual Service (Ver New Group Service New Recurring Appointmer New Recurring Individual S Standing Group Maintenand Edit Individual Service Show Individual Service Launch Billing Pro Forma	22 2 29 3 It ervice

• The dialog box appears. Once you are done viewing, click "OK"

🛾 Billing P	ro Forma Dialc)g						×
Client: SAI:	216, TEST					Admitted	Date: 09/14/2014 Duration 1:00	Start: 05:00 PM Stop 06:00 PM
SubUnit:	TRAINING UN	BUNIT		9901	900	Provided At:	·	B S
Supervisor:	CLINICAL, STA					Outside Facility:	Face to Face	F ME-C 101
Service: Lab:	ASSESSMENT	· - PSYCHOSOCI	IAL 10		10		Not Applicable	
Quantity: Insurance -		Fee:	Da	hs		Intensity Type: Billing Pro For	NOT APPLICABLE	N
Pay So		Benefit		From	-	Determining E Service is not Looking up C Testing Contr	act Pay Source 8999/8999 Silling Information for NON BILLABLE F(Covered by Benefit Plan 8999. lient's Insurance Coverages. act Pay Source 8988/4010 Billing Information for NON BILLABLE F(
-Authorizatic Auth#	ns P. Procedure	From	Thru	Qty I	Jsed 🔺	Service is not Testing Contr Determining E Service is not	Covered by Benefit Plan 4010. act Pay Source 8998/4105 illing Information for NON BILLABLE F(Covered by Benefit Plan 4105. act Pay Source 8998/4109	
▲ Colla	1				•			

EVENT LOG WITH CANCELLED SERVICE EVENT

• Open the individual service window either by double clicking on the service event, or by right clicking and choosing "Edit Individual Service" or "Show Individual Service" from the drop down menu

🜆 Multi Day View			
🕈 🎒 🎫 🖬 🗃 🖬 👖	31 I C A A A D	DDT 🗛 I G 🗹	1 🛅 🖻 💽 📴 🗊 🖆
Entity Type: S · Staff	Entity: CLINICAL, STAFF	Locations: All	9
Friday 09/12/2014	Saturday 09/13/2014	Sunday 09/14/2014 105:00 We Appointment New Individual Servic New Individual Servic New Group Service New Recurring Appo New Recurring Indivi Standing Group Main Edit Individual Servic Show Individual Servic	e (Version Q) 2 1 1 2 2 9 30 10 10 10 10 10 10 10 10 10 10 10 10 10

• Click "Event Log"

Transportation Regd	EBP/SS	Prov. To:	Client		5	A C
Prov. At:	<u>q</u>	Out. Fac:			<u>(</u>	X 0
Con.Type:	<u>q</u>	Appt.Type:	Scheduled		5	X 1
Bill. Type: Not Applicable	<u>q</u> x	Int. Type:	NOT APPLIC	ABLE	<u> </u>	A N
					(
Post/Save Service Billing Pro Forma		_	Event Log	<u>P</u> rint	Payment	Exit
8 1.444	J		1			

• The tracking information displays, including the cancellation information if the event was cancelled. Once you are done viewing, click "Cancel"

Event Log	×
Event Logging Information	
Staff/Date/Time Event Created	
Staff SCHEDULER, STAFF	
Date/Time 09/24/2014 03:46:00 PM	
Staff/Date/Time Event Last Modified	
Staff SCHEDULER, STAFF	11000
Date/Time 09/24/2014 03:54:31 PM	
Staff/Date/Time Service Canceled	
Staff	0
Date/Time / /	
Cancellation Reason	
	a <u>n</u> cel

Scheduler

• Click "Exit"

Prov. At: Out. Fac: Out. Fac: Con. Type: Appt. Type: Scheduled Bill. Type: Not Applicable X	Transportation Regd EBP/SS 🔍	Prov. To: Client
	Prov. At:	Out. Fac: C
Bill. Type: Not Applicable	Con.Type:	Appt.Type: Scheduled 1
	Bill. Type: Not Applicable	Int. Type: NOT APPLICABLE
Post/Save Service Billing Pro Forma Event Log Print Pagment	Post/Save Service Billing Pro Forma	Event Log <u>Print</u> Pagment Exit

PRINT CONSUMER ENCOUNTER FORM

The Consumer Encounter form includes information about the selected event.

• Right click on the desired event and click "Print"

🖪 Multi Day View				_ □
🕈 🖨 🖪 🖪 🖪 🖪 🖪		D D T	A I C 🗹 🗹 🖸] 🖻 🖾 🐯 🗊 🖆
Entity Type: S · Staff 📃 💌	Entity: CLINICAL, STAFF	<u>q</u>	Locations: All	9
Wednesday 09/24/2014	Thursday 09/25/2014	Friday 09/	26/2014	August 2014
			New Appointment New Individual Service New Individual Service (V New Group Service New Recurring Appointm New Recurring Individual Standing Group Maintena Edit Recurring Individual Show Recurring Individual Show Recurring Individual Edit Series Launch Billing Pro Forma Delete Print Recurring	/ersion Q) 1 2 3 eent I Service ance Service 1 al Service 2 2

NOTE: The Consumer Encounter Form is for staff use only and is not an appointment sheet for the client. Programs can determine how the form can be best utilized.



RECURRING INDIVIDUAL SERVICE EVENT

NOTE: Programs shall not exceed 90 days or twelve (12) weeks, when setting the "Rules of Recurrence" in the "End after" or "End by" fields.

• Right click in the column of the day to be scheduled, and click "New Recurring Individual Service" from the drop down menu

🖪 Multi Day View		
\$ @ B 1 3 5		
Entity Type: S - Staff	Entity: CLINICAL, STAFF	Locations: All
Saturday 10/04/2014	Sunday 10/05/2014	Monday 10/06/2014 A
		New Appointment New Individual Service New Individual Service (Version Q) New Group Service
		New Recurring Appointment New Recurring Individual Service Standing Group Maintenance
		Payment

• The "Rules of Recurrence" screen appears. Enter the appropriate information and click "Build"

Rules of Recurrence
Start Time: 6:00 PM Duration 1:00 End Time: 7:00 PM
O Daily Recur Every 1 week(s) on: ● Weekly □ Sunday I Tuesday □ Wednesday ● Monthly □ Thursday □ Friday □ Saturday
Start Date: 10/06/2014 C End After C Currences
<u>B</u> uild Clear Ca <u>n</u> cel

• The "Add/Edit Individual Service Scheduled for [Staff Person's Name]" screen appears. Enter the appropriate information in the top container and click "Save"

Add/Edit Inc	Add/Edit Individual Service Scheduled for CLINICAL, STAFF (Administrative Access)							
Event	Event This Recurring Event has not been Saved.							
Subject:						Pre-F	ayment 🗌	0.00
Date:	10/05/2014 🔳	Start Time: 4:00 PM		Duratio	n: <mark>1:00</mark>	Sto	p Time: 5	00 PM
Client:	FAKE, TEST	<u>a</u>	Location:	TRAINING LO	CATION		Q	
🔍 Unit	TRAINING UNIT	9900	Comment:					A
Sub Unit:	TRAINING SUBUNIT	9901						~
					Save	Delete	Clear	Coll. Svrs

• Enter the appropriate information in the bottom container and click "Post/Save Service"

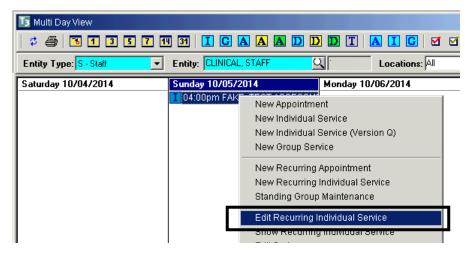
Form #:	0 Date: 10/05/2014						🔲 C. Se	ervers
Staff:	CLINICAL, STAFF	Q		Supervisor:			<u>(</u>	<u>ا ا</u>
Unit:	TRAINING UNIT	Q	9900	Assignment:			bUnit	
Sub Unit:	TRAINING SUBUNIT	Q	9901		9900 - TRA	INING UNIT 990	1 - TRAINING S	SUBI 🚽 🔼
Service:	ASSESSMENT - PSYCHOSOCIAL 10	Q	10	S. Start:	4:00 PM	Duration: 1:00	Stop: <mark>5:00</mark>	D PM
Lab:		Q	0	T. Start:		Duration:	Stop:	
Days:	0 Quan: 0.00 Fee: 0.	.00	Part: 0	D. Start:		Duration:	Stop:	
	Transportation Regd EBP/SS			Prov. To:	Client		5	A C
Prov. At:	Office	Q	A	Out, Fac:			<u>(</u>	<u> </u>
Con.Type:	Face to Face	Q	F	Appt.Type:	Scheduled		5	A 1
Bill. Type:	Not Applicable	Q	X	Int. Type:	NOT APPLI	CABLE	5	R N
P <u>o</u> st/Save	Service Billing Pro Forma				Event <u>L</u> og	<u>P</u> rint	Payment	Exit

• Click "Exit"

Form #:	0 Date: 10/05/2014						C. Servers	
Staff:	CLINICAL, STAFF	Q		Supervisor:			<u>a</u>	
Unit	TRAINING UNIT	Q	9900	Assignment		Sub		al.
Sub Unit:	TRAINING SUBUNIT	Q	9901		9900 - TRA	VINING UNIT 9901	- TRAINING SUBI	2
Service:	ASSESSMENT - PSYCHOSOCIAL 10	Q	10	S. Start:	4:00 PM	Duration: 1:00	Stop: 5:00 PM	
Lab:		Q	0	T. Start:		Duration:	Stop:	
Days:	0 Quan: 0.00 Fee: 0.	00	Part: 0	D. Start:		Duration:	Stop:	
	Transportation Regd EBP/SS			Prov. To:	Client		QC	
Prov. At:	Office	Q	A	Out. Fac:			의	0
Con.Type:	Face to Face	Q	F	Appt.Type:	Scheduled		의	1
Bill. Type:	Not Applicable	Q	X	Int. Type:	NOT APPL	ICABLE	<u>q</u> n	
P <u>o</u> st/Save	Service <u>B</u> illing Pro Forma			_	Event <u>L</u> og	<u>P</u> rint	Payment Exit	

EDIT ONE INDIVIDUAL SERVICE EVENT IN A SERIES

• Right click on the individual service event to be edited. Click "Edit Recurring Individual Service" from the drop down menu



• The "Add/Edit Individual Service for [Staff Member's Name]" screen appears. Make the appropriate changes in the top container, "Save". Make the appropriate changes in the bottom container, and click "Post/Save Service"

Add/Edit Ind	ividual Service Scheduled for CLINICAL, STAFF (Administrativ	e Access) 📃 🗙
Event	This Recurring Event will Occur in the Future.	
Subject:	ASSESSMENT - PSYCHOSOCIAL 10	Pre-Payment 0.00
Date:	10/05/2014 📰 Start Time: 4:00 PM	Duration: 1:00 Stop Time: 5:00 PM
Client:	FAKE, TEST Location:	TRAINING LOCATION
🔍 Unit	TRAINING UNIT 9900 Comment:	
Sub Unit:	TRAINING SUBUNIT	
		Save Delete Clear Coll. Svrs
Services	Editing Server/Service.	
	Staff Service	Start Time End Time Resolved Canceled
Created	CLINICAL, STAFF (10) ASSESSMENT - PS	SYCHOS 04:00 PM 05:00 PM 🔲 🗖
Not Created		
	Scheduled Actual Resolve Service Cancel Service	ce Add Unscheduled Add Delete Clear
Form #:	0 Date: 10/05/2014 [H]	C. Servers
Staff:	CLINICAL, STAFF Supervis	or: 🔍 0
Unit	TRAINING UNIT 9900 Assignme	
Sub Unit:	TRAINING SUBUNIT 9901	9900 - TRAINING UNIT 9901 - TRAINING SUBI 🗾 🖄
Service:	ASSESSMENT - PSYCHOSOCIAL 10 Q 10 S. Sta	art: 4:00 PM Duration: 1:00 Stop: 5:00 PM
Lab:	0 T. Sta	art: Duration: Stop:
Days:	0 Quan: 0.00 Fee: 0.00 Part: 0 D. St.	art: Duration: Stop:
	Transportation Regd EBP/SS Prov. 1	Fo: Client
Prov. At:	Office Q A Out. Fa	ac: 0
Con.Type:	Face to Face	be: Scheduled 🔍 1
Bill. Type:	Not Applicable X Int. Typ	Pe: NOT APPLICABLE
P <u>o</u> st/Save	Service Billing Pro Forma	Event Log Print Payment Exit

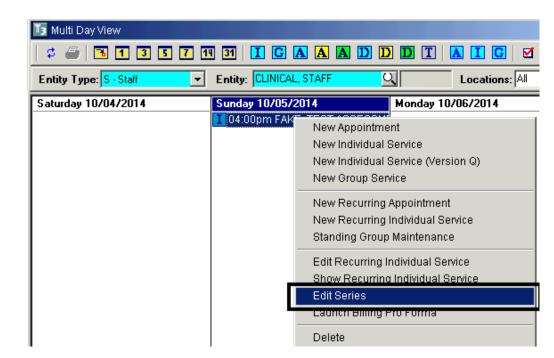
• The "Update Attendee and Calendar Records?" dialog box appears. Click "Proceed with Save".



• Click "Exit"

	, Transportation Regd	EBP/SS	Prov. To:	Client				
Prov. At: 0	ffice	<u>a</u> a	Out. Fac:				ব 📃	0
Con.Type: Fa	ace to Face	<u> </u>	Appt.Type:	Scheduled			ব 🦳	1
Bill. Type: No	ot Applicable	<u>a</u> x	Int. Type:	NOT APPLICABLE			Q N	
L								
Post/Save Ser	rvice Billing Pro Forma			Event <u>L</u> og <u>P</u> rin	nt	Payment	Exį	t

EDIT ALL INDIVIDUAL SERVICE EVENTS IN A SERIES



• Right click on any individual service event in the series and click "Edit Series"

• The "Recurring Service" screen displays. Check any box and click "Edit a Service"

Startdate	Day	Starttime	Endtime	Select 🔺
10/05/2014	SUNDAY	04:00 PM	05:00 PM	
10/12/2014	SUNDAY	04:00 PM	05:00 PM	
10/19/2014	SUNDAY	04:00 PM	05:00 PM	
				_
Unresolved	Dnly C All		C D	
······································			Copy D	ate:
Copy a Service	: Select All for F	Paste Pas	ste Service	Deselect All
Edit a Service	Recur Servi		Selected Svcs	Exit

• The "Add/Edit Individual Service" screen displays. Make the appropriate changes in the top container, "Save". Make the appropriate changes in the bottom container, and click "Post/Save Service"

Add/Edit Ind	lividual Service Scheduled for CLINICAL, STAFF (Administrativ	e Access) 📃 🗙
Event	This Recurring Event will Occur in the Future.	
Subject:	ASSESSMENT - PSYCHOSOCIAL 10	Pre-Payment 0.00
Date:	10/05/2014 🔳 Start Time: 4:00 PM	Duration: 1:00 Stop Time: 5:00 PM
Client:	FAKE, TEST Location	TRAINING LOCATION
	TRAINING UNIT 9900 Commen	
Sub Unit:	TRAINING SUBUNIT	v
		Save Delete Clear Coll. Svrs
Services	Editing Server/Service.	
	Staff Service	Start Time End Time Resolved Canceled
Created	CLINICAL, STAFF (10) ASSESSMENT - P	SYCHOS 04:00 PM 05:00 PM 🔲 🗖
Not Created		•
	Scheduled Actual Resolve Service Cancel Serv	ce Add Unscheduled Add Delete Clear
Form #:	0 Date: 10/05/2014	C, Servers
Staff:	CLINICAL, STAFF Q Supervi	sor: Q 0
Unit	TRAINING UNIT 9900 Assignm	
Sub Unit:	TRAINING SUBUNIT	9900 - TRAINING UNIT 9901 - TRAINING SUBI 🛒 🖄
Service:	ASSESSMENT - PSYCHOSOCIAL 10 S. SI	art: 4:00 PM Duration: 1:00 Stop: 5:00 PM
Lab:	Q 0 T. St	art: Duration: Stop:
Days:	0 Quan: 0.00 Fee: 0.00 Part: 0 D. Si	art: Duration: Stop:
		Fo: Client C
Prov. At:		
		pe: Scheduled 1
Bill. Type:	Not Applicable	PE: NOT APPLICABLE
P <u>o</u> st/Save	Service Billing Pro Forma	Event Log Print Payment Exit

• Click "Exit"

		Transportation Reqd	EBP/SS	Prov. To:	Client	5	য
	Prov. At:	Office	<u>a</u> a	Out, Fac:		C	L 0
	Con.Type:	Face to Face	S F	Appt.Type:	Scheduled	ſ	<u>२</u> ा
	Bill, Type:	Not Applicable	<u>a</u> x	Int. Type:	NOT APPLICABLE	ſ	<u>r</u> n
L							
	P <u>o</u> st/Save	Service Billing Pro Forma			Event <u>L</u> og <u>P</u> rint	Payment	Exit

- Scheduler
- To copy the change to the remaining dates in the series, check the box next to the service you just edited and click "Copy a Service"

Recurring Service (/	Administrative Acc	ess)		×
Startdate D	Day	Starttime	Endtime	Select 🔺
10/05/2014 SL	UNDAY C	05:00 PM	06:00 PM	
10/12/2014 SL	UNDAY C	04:00 PM	05:00 PM	
10/19/2014 SL	UNDAY C	04:00 PM	05:00 PM	
				_
J				–
-	-			
Unresolved Only	y CAII		Copy Date:	
		1		
Copy a Service	Select All for Past	te Paste Se	ervice C	eselect All
Edit a Service	Recur Service	Delete Selec	cted Svcs	Exit

• Either check the box(es) next to the services you wish to copy the change to, or, if the change applies to all services, click "Select All for Paste"

Recurring Service	(Administrative Ac	cess)		×	
Startdate	Day	Starttime	Endtime	Select 🔺	
10/05/2014 S	SUNDAY	05:00 PM	06:00 PM		
		04:00 PM	05:00 PM		
10/19/2014 S	SUNDAY	04:00 PM	05:00 PM		
				-	
Unresolved Only C All Copy Date: 10/05/2014					
Copy a Service	Select All for Pas	ste Paste S	ervice [) eselect All	
Edit a Service	Recur Service	Delete Sele	cted Svcs	Exit	

- × Recurring Service (Administrative Access) Startdate Select Day Starttime Endtime N N 10/12/2014 SUNDAY 04:00 PM 05:00 PM SUNDAY 10/19/2014 04:00 PM 05:00 PM -● Unresolved Only O All Copy Date: 10/05/2014 Select All for Paste Copy a Service Paste Service Deselect All Recur Service Delete Selected Svcs Exit Edit a Service
- Click "Paste Service" which copies the change to the services you selected

• Click "Exit"

Recurring Service	e (Administrative /	Acces:	S)				×
Startdate	Day	Sta	arttime	Endtime		Select	
10/05/2014 10/12/2014	SUNDAY SUNDAY		10 PM 10 PM	06:00 PM 06:00 PM		R	
10/19/2014	SUNDAY		IO PM	06:00 PM			
							•
Unresolved Only C All Copy Date:							
Copy a Service	Select All for F	Paste	Paste S	ervice	D) eselect A	di
Edit a Service	Recur Servi	ice	Delete Sela	ected Sives		Exit	



RECUR EXPIRED SERVICE EVENT

• Right click on any individual service event in the series and click "Edit Series"

🜆 Multi Day View				
🕴 🥔 🖪 🖪 🕄 🖪 🖪	I 31 I G .	A A D	DDT	🔺 🚺 🖸 🛛 🗹
Entity Type: S - Staff	Entity: CLINICAL	, STAFF	<u>a</u>	Locations: All
Saturday 10/04/2014	Sunday 10/05/2	2014	Monday	10/06/2014
	1 04:00pm FAK	New Appoin	tment	
		New Individ	ual Service	
		New Individ	ual Service (V	ersion Q)
		New Group	Service	
		New Recurr	ing Appointm	ent
		New Recurr	ing Individual	Service
		Standing Gr	oup Maintena	nce
		Edit Recurri	ng Individual :	Service
	_	Show Recu	rrina Individua	Il Service
		Edit Series		
		Launch Billi	ng Pro Forma	
		Delete		

• The "Recurring Service" window displays. Check the bottom select box and click "Recur Service"

Startdate	Day	Starttime	Endtime	Select 🔺
10/05/2014	SUNDAY	05:00 PM	06:00 PM	
10/12/2014	SUNDAY	05:00 PM	06:00 PM	
10/19/2014	SUNDAY	05:00 PM	06:00 PM	(☑)
				U
				-
Unresolved	IOnly O All		Copy D	ate:
			00000	u.u. j
Copy a Servic	e Select All for	Paste Past	te Service	Deselect All

• Set the "Rules of Recurrence". Make sure the Start Date is the first day that is not already scheduled (otherwise duplicate appointments will appear). Click "Build"

Rules of Recurrence	×
Start Time: 05:00 PM Duration 1:00 End Time: 06:00 PM	
O Daily Recur Every 1 week(s) on: Weekly Sunday Monday Tuesday Wednesday Monthly Thursday Friday Saturday 	
Start Date: 10/26/2014 C End After C End By	
<u>B</u> uild Clear Ca <u>n</u> ce	

• Exit from the Recurring Service window

Recurring Service (/	Administrative Acc	ess)		X
Startdate D)ay	Starttime	Endtime	Select 🔺
10/05/2014 SL	UNDAY 0	05:00 PM	06:00 PM	
10/12/2014 SL	UNDAY 0)5:00 PM	06:00 PM	
10/19/2014 SU	UNDAY 0)5:00 PM	06:00 PM	
10/26/2014 SL	UNDAY 0)5:00 PM	06:00 PM	
11/02/2014 SL	UNDAY 0)5:00 PM	06:00 PM	
				-
Unresolved Only			Copy Date:	
			,	
Copy a Service	Select All for Past	te 🔋 Paste Se	ervice D)eselect All
Edit a Service	Recur Service	Delete Seler	cted Svcs	Exit

APPOINTMENT LISTING

• To see the list of scheduled events for the "Entity" in the Multi Day View, click the "Appointment Listing" icon

🜆 Multi Day View			🗆 ×
🕴 🏉 🖪 🖪 🕄 🕇	11 31 I G A A A I	D D T A I C I I I	
Entity Type: S - Staff	Entity: CLINICAL, STAFF	Locations: All	Appointment List
Saturday 10/04/2014	Sunday 10/05/2014	Monday 10/06/2014	August 2014
		🔥 06:00pm TEAM MEETING	SMTWTFS
1			1 2
			3 4 5 6 7 8 9
			10 11 12 13 14 15 16
			17 18 19 20 21 22 23
1			24 25 26 27 28 29 30

• Adjust the dates accordingly, click "Refresh" and click "Print"

stan: ju	LINICAL, STAFF				Dates:	10/01/201	1 🔳 Thru: 🔽		🛱 Refrest
ate	Subject	Location	Server	Service	Start	End	Appointment Type	Resolved	Canceled
/12/2014	TEAM MEETING	1-HHSA MH BILLII			06:00 PM	07:00 PM			
11/2014	TEAM MEETING	1-HHSA MH BILLII			06:00 PM	07:00 PM	Busy Time Appointme		
/10/2014	TEAM MEETING	1-HHSA MH BILLII			06:00 PM	07:00 PM	Busy Time Appointme		
/03/2014	TEAM MEETING	1-HHSA MH BILLII			06:00 PM	07:00 PM	Busy Time Appointme		
/31/2014	coffee break	3410-CENTER ST.			11:00 AM	12:00 PM	Busy Time Appointme		
/27/2014	TEAM MEETING	1-HHSA MH BILLII			06:00 PM	07:00 PM	Busy Time Appointme		
20/2014	TEAM MEETING	1-HHSA MH BILLII			06:00 PM	07:00 PM	Busy Time Appointme		
13/2014	TEAM MEETING	1-HHSA MH BILLII			06:00 PM	07:00 PM	Busy Time Appointme		
/06/2014	TEAM MEETING	1-HHSA MH BILLII			06:00 PM	07:00 PM	Busy Time Appointme		

• Choose "Screen" as the Print Destination, and click "OK"

Print Destination		
Screen Default Printer Other Printer** VPE File (.VPE) Text File CSV File		
File Name:		
	OK	Cancel

• Once you are done viewing, click "Close Preview"



• On the "Appointment Listing", click "Cancel"

Starr: JUL	INICAL, STAFF				Dates:	10/01/2014	4 🔳 Thru: 🚺		🗘 Refresh
ate	Subject	Location	Server	Service	Start	End	Appointment Type	Resolved	Canceled
/12/2014	TEAM MEETING	1-HHSA MH BILLII			06:00 PM	07:00 PM	Busy Time Appointme		
/11/2014	TEAM MEETING	1-HHSA MH BILLII			06:00 PM	07:00 PM	Busy Time Appointme		
/10/2014	TEAM MEETING	1-HHSA MH BILLII			06:00 PM	07:00 PM	Busy Time Appointme		
/03/2014	TEAM MEETING	1-HHSA MH BILLII			06:00 PM	07:00 PM	Busy Time Appointme		
/31/2014	coffee break	3410-CENTER ST.			11:00 AM	12:00 PM	Busy Time Appointme		
/27/2014	TEAM MEETING	1-HHSA MH BILLII			06:00 PM	07:00 PM	Busy Time Appointme		
20/2014	TEAM MEETING	1-HHSA MH BILLII			06:00 PM	07:00 PM	Busy Time Appointme		
13/2014	TEAM MEETING	1-HHSA MH BILLII			06:00 PM	07:00 PM	Busy Time Appointme		
/06/2014	TEAM MEETING	1-HHSA MH BILLII			06:00 PM	07:00 PM	Busy Time Appointme		

Scheduler

PRINT NEXT APPOINTMENT

• To print the client's next service event, click the "Print Next Appointment" icon

🖪 Multi Day View							×
\$ 🛎 🖪 🖪 🖪 🖪 🖪	31 I G A A A D D) D T A I C Ø Ø	•		<u>.</u>)		9
Entity Type: S - Staff	Entity: CLINICAL, STAFF	Locations: All		Print	the Ne	ext Ap	pointmen ⁻
Saturday 10/04/2014	Sunday 10/05/2014	Monday 10/06/2014	4	Augu	ıst 2014	ļ	•
	A 06:00pm TEAM MEETING		S	ΜТ	W T	F	S
				· _		1	2

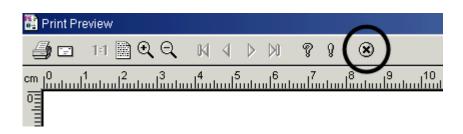
• Enter the desired client, click on the service event you wish to print, and click "Print"

)ate	Subject	Location	Server	Service Code	Start	End	Appointment Type	Resolved
1/05/2014 1/12/2014 1/19/2014 1/26/2014 1/02/2014	ASSESSMENT - PSYCHI ASSESSMENT - PSYCHI ASSESSMENT - PSYCHI ASSESSMENT - PSYCHI ASSESSMENT - PSYCHI	0 1 -HHSA MH BILLING 0 1 -HHSA MH BILLING 0 1 -HHSA MH BILLING	Caracteria and the set of	10 - ASSESSMENT - PSY 10 - ASSESSMENT - PSY	05:00 PM 05:00 PM 05:00 PM	06:00 PM 06:00 PM 06:00 PM 06:00 PM 06:00 PM	Individual Service Individual Service Individual Service Individual Service Individual Service	
	e Created te Not Created					splay • UnResol	ved C Resolved	C All

• Choose "Screen" as the Print Destination, and click "OK"

Print Destination		
 Screeni Default Printer Other Printer** VPE File (VPE) Text File CSV File 		
File Name:		
	OK	Cancel

• Once you are done viewing, click "Close Preview". NOTE: If you are printing for a client, be sure not to give them the "Balance" section at the bottom of the page



• On the "Next Appointment" window, click "Close"

Date	Subject	Location	Server	Service Code	Start	End	Appointment Type	Resolved
0/05/2014	ASSESSMENT - PSYCH		CUNICAL STAFF	10. ASSESSMENT . PSY	05:00 PM	06:00 PM	Individual Service	nesuiveu
0/12/2014	ASSESSMENT - PSYCH		CLINICAL STAFF	10 - ASSESSMENT - PSY		06:00 PM	Individual Service	
/19/2014	ASSESSMENT - PSYCH		CLINICAL, STAFF			06:00 PM	Individual Service	ă –
0/26/2014	ASSESSMENT - PSYCH		CLINICAL STAFF	10 - ASSESSMENT - PSY	05:00 PM	06:00 PM	Individual Service	ū l
/02/2014	ASSESSMENT - PSYCH		CLINICAL STAFF	10 - ASSESSMENT - PSY	05:00 PM	06:00 PM	Individual Service	ā
_	e Created e Not Created					isplay ● UnResol	ved O Resolved	0 All

Scheduler

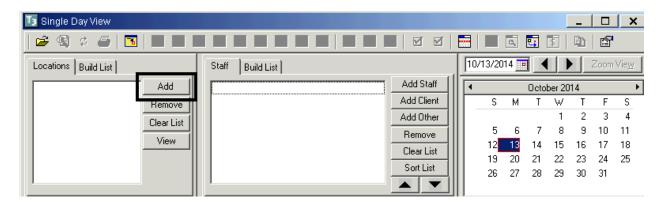
SINGLE DAY VIEW

The Single-Day View displays more than one staff member's schedule at a selected location for a single day.

• Click the Scheduler menu, and click "Scheduler Maintenance- Single-Day"

Scheduler	Client Assignments	Client Fin						
Scheduler Maintenance - Multi Day								
Scheduler Maintenance - Single Day								
Scheduler Setup								
Schedule	er Reports	+						

• Click "Add"



• Check the box next to the location you wish to view, and click "Build"

🜆 Single Day View						[-		×
Locations Build List Staff Build List 10/13/2014 📺 🖌 Zoom View								Vie <u>w</u>	
0 ID		Add Staff			Oct	ober 20)14		•
ID Description S 🔺		Add Client		S	M T	W	Т	F	S
7620 RADY KIDSTART NC		Add Other				1	2	3	4
8250 TRANSITION SERVIC		Remove	11	5	6 7	8	9	10	11
8800 FAMILIES FORWARE		Clear List	11	12	13 14	15	16	17	18
			11	19 3	20 21	22	23	24	25
19900 Training Unit		Sort List		26 2	27 28	29	30	31	
● ID ● Desc Find Build Clear	,		11						

Scheduler

• Click "Add Staff"

🜆 Single Day View											_		×
Locations Build List	Staff	Build List					10/13	/2014	•			Zoom	Vie <u>w</u>
Add					Add Staff		•		Octo	ber 20	14		•
Remove					Addicilent			S M	Т	W	Т	F	S
Clear List					Add Other					1	2	3	4
					Remove			5 6	- 7	8	9	10	11
View					Clear List		1	2 13	14	15	16	17	18
							1	9 20	21	22	23	24	25
					Sort List		2	6 27	28	29	30	31	

• A list of staff members associated with the selected location displays. Check the boxes next to the desired staff, and click "Save"

Staff Lookup		×
ID 1 2 	Name CLINICIAN, TEST CLINICIAN, TRAINER	
		× A‼ None ↓ Invert ↓ Eind ↓ Exit

• Staff names can be moved up and down, which corresponds to left and right in the grid below. To move a particular staff name to the left, click the staff name and click the up arrow. To move a particular staff name to the right, click the staff name and click the down arrow

Staff Build List	
CLINICIAN, TEST	Add Staff
CLINICIAN, TRAINER	Add Client
	Add Other
	Remove
	Clear List
	Solt List

Scheduler

CREDENTIAL FILTERS

• To view staff members schedules based on credentials, click "Build List"

	🛐 Single Day View											_		×
	🛎 😫 👙 🎒 📕 📕								α,	•	\$	Ę)	P	
1	Locations Build List		Staff	Build List			[]	0/13/2	014 📑				Zoom	Vie <u>w</u>
	Training Unit Add					Add Staff		(Octo	ber 20	14		•
Ш	Remove					Add Client		S	м	Т	W	Т	F	S
Ш	Clear List					Add Other					1	2	3	4
Ш	View					Remove		5	_	7	8	9	10	11
Ш	VIEW					Clear List		12	13	14	15	16	17	18
ш		11						19	20	21	22	23	24	25
ш		11				Sort List		26	27	28	29	30	31	
	1		1											

• Click "Load".

Staff	Build List		
Crd Grps:	All	<u>a</u>	Build
Creds:	All	<u>q</u>	Clear
Crd/Srvc:	All	এ	Load
Pvd/Psrc:	All	<u> </u>	Save
Pvd/Pln:		<u>q</u>	
Units:	All	<u> </u>	
Staff:	All	<u> </u>	

• Click the desired credentials and click "OK"

)	Description	Created On	Created By	Last Used
	9 LIC & WAIVERED CLINICIANS	05/20/2009	28	10/21/2013
	3 MEDICARE	05/14/2009	28	11/07/2012
	6 NONLICENSED CLINICIANS	05/14/2009	28	04/27/2012
	1 NURSES	05/14/2009	28	09/12/2012
	5 PARA PROFESSIONALS	05/14/2009	28	06/19/2013

Scheduler

VIEW OPTIONS

• Click the View Options icon

🖪 Single Day View		_ <u>_</u> ×
😅 🍕 🦸 🎒 🖪 🛛 🖸	🛦 🗛 D D D T A I G 🗹 🗹	🔚 🔳 🖾 🖾 🗗 🖿 🌘 🈭

• Check the box next to "Display Cancelled Events", and click "User Interface"

🥅 Single Day View O	ptions		×
- Filters - User Interface	Filters		
Date/Time	 Display Reserved Time Only Display Besolved Services Display Canceled Events Check In Display All Checked In Not Checked In 		
]		🔀 <u>O</u> k	Ca <u>n</u> cel

• For the "Number of Columns", choose the desired number of staff you wish to view

🔜 Single Day View Op	otions			×
Filters User Interface	🔊 User Interf	ace		
Date/Time	🔽 Display Status Ba	r?		
	-	Horizontal/Ver	tical Gridlines	•
	Number of Columns: Time Interval:	1 <u>•</u> 1 2 ur	•	
		3 4 5 6 7		
		6 7 8		
			🔀 <u>O</u> k	≍ Ca <u>n</u> cel

• For the "Time Interval" choose the interval that represents the shortest service event your program offers (i.e. the program does not schedule services less than 20 minutes in length). Click "OK"

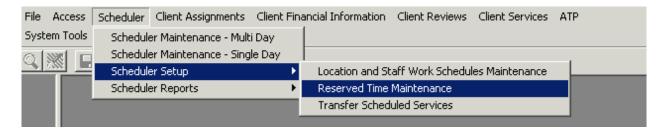
🔜 Single Day View O	ptions				×
Filters User Interface	👂 User Interfac	e			
Date/Time					
	🔽 Display Status Bar?				
	GridLine Style: H	orizontal/Vei	rtical Gridli	nes 🔻	
	Number of Columns: 3	•			
	Time Interval: 0	ne Hour	-		
		ne Hour) Minutes			
	2) Minutes 5 Minutes			
	10) Minutes			
1	5	Minutes	🔀 <u>O</u> k		ancel

Scheduler

RESERVE TIME MAINTENANCE

Reserve time allows you to set aside time for intakes, assessments, on call, triage, etc. NOTE: Staff do not have rights to delete reserve time. If reserve time must be deleted, call the OptumHealth Support Desk. Staff should not schedule reserve time more than 90 days in advance.

• Click the "Scheduler" menu, "Scheduler Setup", and "Reserved Time Maintenance"



To view reserve time that has already been scheduled, adjust the filters accordingly

🚺 Reserved Time M	aintenance (Administrative Access)		_ D X
Reserved Time Types:	PAPERWORK / UPDATES	4	Dates: 10/13/2014 📺	Thru: 10/30/2014 📺
Staff:	CLINICAL, STAFF	<u>q</u>		
Locations:	All	9		💥 Clear
🔁 Date				

• To enter reserve time, click in the first open date cell, enter the date, and click the magnifying glass in the "Reserved" column

📧 Reserved Time	e Maintenance (Ad	Iministrative Access))			_		x
Reserved Time Typ	es: PAPERWORK	/ UPDATES	4	Dates: 10)/13/2014 🔳	Thru: 10/3	30/2014	
St	aff: CLINICAL, STA	FF	<u>q</u>			4 I Thru: 10/30/2014 I Start End •		
Locatio	ons: All		এ				💥 Cle	ar
8 Reserved Time	Туре							
Date	Respan	Staff		Location		Start	End	
10/23/2014								
	-							-

• Click the desired reserve time type, and click "OK"

Reserved Tin	ne Types Lookup			×
ID	Description			
1	ASSESSMENT - MD/DO			
2	ASSESSMENT - CLINICIAN			
3	SCREENING / TRIAGE			
4	PAPERWORK / UPDATES			
5	OPEN MEDS			
6	INTAKE			
7	ON CALL / DUTY			
				-
 Active 	C Inactive C All	<u>F</u> ind	<u>0</u> K	Ca <u>n</u> cel

• Enter the necessary information in the remaining fields, and tab to the next row to save

Ī	🖪 Reserved Tim	ie Maintei	nance (Administrativ	e Access)					×
	Reserved Time Ty	pes: PAP	ERWORK / UPDATES	6	Q 4	Dates	: 10/13/2014 🔳	Thru: 10/3	30/2014	•
	s	taff: CLIN	IICAL, STAFF		<u>q</u>					
	Locati	ons: All			<u>q</u>				💥 Clea	ar
	🟮 End Time									
	Date	Reser		Staff		Location		Start	End	
	10/23/2014	4	PAPERWORK / UPD		CLINICAL, STAFF	9900	TRAINING UNIT	2:00 PM	3:00 PM	



RECURRING RESERVE TIME MAINTENANCE

		ERWORK / UPDATES IICAL, STAFF	;	의 4 의 의	Date:	: 10/13/2014 🔳	Thru: 10/	30/2014
🔁 Date Date	Reser		Staff	[Location		Start	End
0/23/2014	1 4	PAPERWORK / UPC		CLINICAL, STAFF	9900	TRAINING UNIT	02:00 PM	03:00 PM

• Click the row you wish to recur, and click "Recur"

• Set the Rules of Recurrence as desired, and click "Build"

Rules of Recurrence								
Start Time: 02:00 PM Duration 1:00 End Time: 03:00 PM								
Daily Every Days Veekly Monthly								
Start Date: 10/23/2014 C End After 10 Occurrences C End By 7 /								
<u>B</u> uild Clear Ca <u>n</u> cel								

FINDING AN OPEN TIME SLOT TO LOCATE

RESERVE TIME MAINTENANCE

• To locate reserve time, click the "Find An Open Time Slot" icon on the menu bar of the single day view

13 Single I		
🛋 🕄	¢ 🛎 🖪 I G A A D D D I A I G 🗹 🗹 🔤 🖬 🖬	Ē

• Enter the desired information and click "Find"

Find Open Time	e Slot 📃 🗙
🦻 Find O	pen Time Slot
Staff:	CLINICAL, STAFF
Reserved Type:	PAPERWORK / UPDATES 4
Start Date:	10/30/2014
Find	Next One Hour time slot
	Q_ <u>F</u> ind ∭Clear <u>x</u> Ca <u>n</u> cel

• The date on the single day view calendar changes according to the selections chosen; however, the actual time slot is not automatically selected

Scheduler

FINDING AN OPEN TIME SLOT

For staff who are booked solidly for weeks in advance, you can search for available time.

• Click the "Find An Open Time Slot" icon on the menu bar of the single day view

🚺 Single (Day Vie	ew.															×
🛋 🕅) : (5 🖪	IG	A A	A D	DI	Τ	Α	I	G	2	2 🚍	<u>¢</u>	•	5 F	P	

• Enter the desired information and click "Find". NOTE: Leave "Reserved Type" blank

Find Open Time	e Slot	×
🦻 Find O	pen Time Slot	
Staff:		
Reserved Type: Start Date:		
Find	Next One Hour time slot	
	Q <u>F</u> ind KClear Z Ca	ncel

• The date on the single day view calendar changes accordingly; however, the actual time slot is not automatically selected



TRANSFERRING SCHEDULED SERVICES

The "Transfer Scheduled Services" utility transfers selected services from one staff's schedule to another.

• Click the "Scheduler" menu, "Scheduler Setup", and "Transfer Scheduled Services"

File	Access	Scheduler	Client Assignments	Client Fina	ancial Information	Client Reviews	Client Services	Al
୍କା	<u> </u>		er Maintenance - Mult er Maintenance - Sing					
		Schedule	er Setup	×	Location and St	aff Work Schedu	les Maintenance	
	Scheduler Reports				Reserved Time	Maintenance		
					Transfer Sched	uled Services		

• Enter the desired staff in the fields on the left

Is Transfer Scheduled Services (Administrative Access)		_ 🗆 🗙
Transfer From Staff: CLINICAL, STAFF	Service Dates: 10/01/2014 Q - 10/19/2014 Q	\$ 💥
Transfer To Staff: GENERIC, CLINICAL		

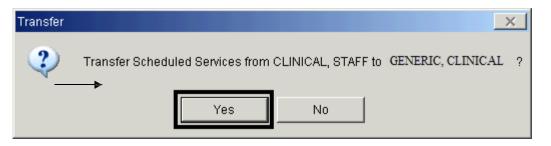
• Enter the service dates in the fields on the right

Ts Transfer Scheduled Services (Administrative Access)		_
Transfer From Staff: CLINICAL, STAFF	Service Dates: 10/01/2014 Q - 10/19/2014 Q	¢ 💥
Transfer To Staff: GENERIC, CLINICAL		

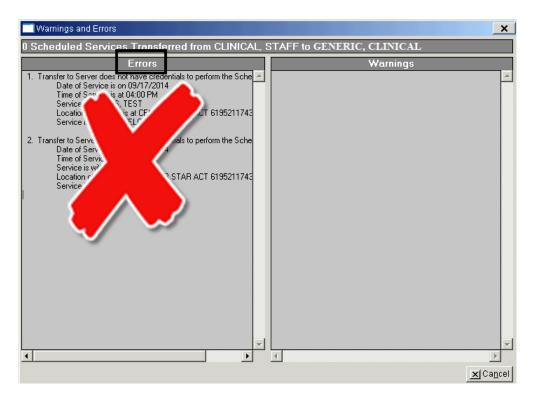
• Check the box(es) next to the services you wish to transfer and Click "Transfer"

Date	Start	End	Loc	Name	Client	Name	Unit	SUnit	Service	Desc	Туре	Lead	Sel 🔺	
10/01/2014	10:00 AM	11:00 AM	3410	CENTEF		216, TE	3410	3411	50	CASE M	S	Y	A	
10/05/2014	05:00 PM	06:00 PM	1	HHSA M		FAKE, T	3040	3042	10	ASSESS	S	Y ((☑)	
10/07/2014	01:00 PM	02:45 PM	3040	HEARTI		TEST, F	6240	6241	50	CASE M	S	Y	×	
10/10/2014	05:00 PM	06:00 PM	3410	CENTEF		216, TE!	3410	3411	30	PSYCH	S	Y (
10/11/2014	06:00 AM	06:45 AM	3410	CENTER		GROUP	0		35	REHAB-	G	N	Y	
10/12/2014	05:00 PM	06:00 PM	1	HHSA M		FAKE, T	3040	3042	10	ASSESS	S	Y		
10/19/2014	05:00 PM	06:00 PM	1	HHSA M		FAKE, T	3040	3042	10	ASSESS	S	Y		
														🗙 All
														□ None
														d Invert
														\sim
													-	🕒 Trans
,														\sim
												111.	C <u>l</u> ear	. x Exit

• The "Transfer" dialog box appears. Click "Yes"



• The "Warnings and Errors" dialog box appears. Click "Cancel". NOTE: "Errors" will not transfer, but "Warnings" will



NEW GROUP SERVICE EVENT

• Right click in the column of the day to be scheduled. Click "New Group Service" from the drop down menu

🌆 Multi Day View				_ 🗆 🗙
🕴 🥔 🖪 🖪 🖪	7 14 31 I G A A A	DDDT	1 C 0 0	🖸 📕 🖾 💽 🛐 🔐
Entity Type: <mark>S - Staff</mark>	Entity: CLINICAL, STAFF	<u>Q</u>	Locations:	<u>q</u>
Mon 10/13/2014 Tue 1	0/14/2014 Wed 10/15/2014 New Appointment New Individual Service New Individual Service (Vi New Group Service		Fri 10/17/2014 !	Image: Constraint of the stress of
	New Recurring Appointme New Recurring Individual Standing Group Maintena Payment	Service		November 2014 ▶ S M T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30
<u>د</u>		()		S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 31

• An "Add/Edit Group Service Scheduled for [Staff Person's Name]" screen appears. On the "Subject" line, enter the name of the group. If no information is entered into the "Subject" line, it will default to the service code description after the first server is saved

vent 🖸	This Normal Event has not b	een Saved.			
Subject:					
Date: 👖	1/14/2014 III	Start Time:	Duration:	Stop Time:	
Unit:		Comm	ent:		Save
Sub Unit: 🗌		9			Delet
.ocation: 📘					Clea
cheduled 4	Actual				
ervers			Staff:	Q	
Staff	Service Start Time End	Time Lead 🔺	Starr: Service:	<u> </u>	
		Add		Duration: Stop:	
		Save		during Time Period?	
			pervisor:	<u></u>	
lients			,		
Client	Pr Start Time End Tim	e C Cxl 🔺	Client:	의 오	
			Unit:	<u> </u>	Assign Unit
			SUnit:	9	
			🗖 Transporta	tion Required	
		Pr	ov. To:	<u></u>	Start/Dur/S
		P	rov. At:	<u>u</u>	
			ut. Fac:	<u></u>	
		USI I	n.Type:	<u> </u>	
		Add	o.Type:	<u></u>	EBP/SS
		Dave	. Type:	<u></u>	
		👻 Delete 🖿	: Туре:	9	

• For a "Normal" appointment event, enter the "Start Time" followed by an "A" (or "a") for a.m. or "P" (or "p") for p.m. and the duration of the event (i.e. if the length of the event is 1 hour and 45 minutes, enter 1:45). This populates the "Stop Time"

Add/Edit Gro	up Service Scheduled for CLINICAL, STAFF (Administrative Access)	X
Event	This Normal Event has not been Saved.	
Subject:		
Date:	0/14/2014 📺 Start Time: 2:00 PM Duration: 1:45 Stop Time: 3:45 PM	
Unit:	Comment:	Save
Sub Unit:		Delete
Location:		Clear

• Enter the "Unit" and the "Location" field automatically fills. Enter the "SubUnit"

A	Add/Edit Group Service Scheduled for CLINICAL, STAFF (Administrative Access)								
	Event G This Normal Event has not been Saved.								
	Subject:	[
	Date:	10/14/2014	Start Time: 2:00 PM Duration: 1:45 Stop Time: 3:45 PM						
ſ	Unit	TRAINING UNIT	9900 Comment:	Save					
I	Sub Unit:	TRAINING SUBUNIT	9901	Delete					
l	Location:	TRAINING LOCATION		Clear					

• Enter any comments regarding the group in the "Comments" field, and click "Save". The lower containers activate

d/Edit Group Service Scheduled for CLINICAL, STAFF (Administrative Access)	×
vent G This Normal Event has not been Saved.	
Subject	
Date: 10/14/2014 III Start Time: 2:00 PM Duration: 1:45 Stop Time: 3:45 PM	
Unit TRAINING UNIT 9900 Comment: GROUP WILL EDUCATE CLIENTS ON HOW TO	Save
Sub Unit: TRAINING SUBUNIT Q 9901 ESTABLISH AND MAINTAIN A MEDICATION CALENDAR.	Delete
Location: TRAINING LOCATION	Clear

- Scheduler
- The "Staff" field defaults to the entity selected; however, if desired, the staff person can be changed. Select the intended "Service" for the scheduled event from the drop down menu

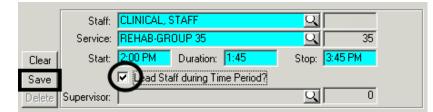
Staff:	CLINICAL, 9	STAFF							
Service:			(<u>u</u>)						
Start:	2:00 PM	Duration: 1:45	Stop: 3:45 PM						
Lead Staff during Time Period?									
Supervisor:			Q	0					

ID		Desc	٠
	31 F	PSYCHOTHERAPY - GROUP 31	
	32 F	PSYCHOTHERAPY- FAMILY 32	
	33 (COLLATERAL 33	
	34 F	REHAB-INDIVIDUAL 34	
	35 F	REHAB-GROUP 35	
	36 F	REHAB-FAMILY 36	
	37 F	REHAB EVALUATION 37	
	38 F	PSYCH THERAPY INTERAC-IND 38	
	39 F	PSYCH THERAPY INTERAC-GRP 39	•

- Once a service code is selected, the service code indicators autofill. If the "Prov. At" (place of service) is different than the default, enter the correct "Prov. At" from the drop down menu
- Enter an "Outside Facility" if "K", "D", or "S" is selected as the "Prov. At). Other service indicators can be changed if desired

Prov. To:	Client		Start/Dur/Stop
Prov. At	School	<u> </u>	2:00 PM
Out, Fac:	MASON ELEMENTARY-SD	Q 547	1:45
Con.Type:	Face to Face	<u> </u>	3:45 PM
Арр.Туре:	Scheduled	<u> </u>	EBP/SS
Bill. Type:	Not Applicable	<u>q</u> x	
Int. Type:	NOT APPLICABLE	<u>q</u> n	

- Scheduler
- If the staff person in the staff field is the lead staff, mark the "Lead Staff during time period?" check box. Click "Save". Add additional staff as needed



• Add clients and click "Save"

Scheduled Actua	I]							
Servers Staff CLINICAL, STAFF	Service Start T 35 02:00 F		Lead 🔺	Clear Save	Staff: Service: Start: Supervisor:	2:00 PM Duration: 1:45 Lead Staff during Time Period?	Q Q Stop: 3:45	PM 0
Clients	Pr Start Time	End Time C		Delete	Client: Unit: SUnit:	FAKE, TEST TRAINING UNIT TRAINING SUBUNIT	9900 9901	Assign Unit 9900/9901
				Cxl Clear Save Delete	Prov. To: Prov. At: Out. Fac: Con. Type: App. Type: Bill. Type:	School MASON ELEMENTARY-SD Face to Face	다. 고 S 고 547 고 F 고 T 고 X	Start/Dur/Stop 2:00 PM 1:45 3:45 PM EBP/SS

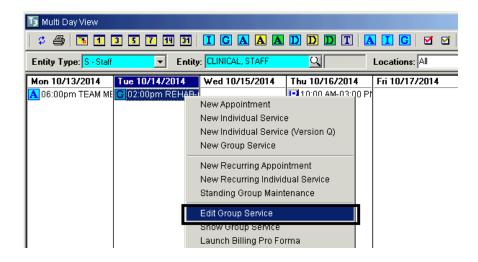
• Repeat to add additional clients. Edit any fields that are specific to the client before saving. When all clients are added click "Exit"

Clients							or i			Q
Client	Pr 9	Start Time	End Time	C	Cxl 🔺		Client:			
FAKE, TEST	0.00 0	2:00 PM	03:45 PM				Unit	TRAINING UNIT	<u>C</u> 9900	Assign Unit
							SUnit	TRAINING SUBUNIT	9901	
								Transportation Required		
							Prov. To:	Client	QC	Start/Dur/Stop
							Prov. At:	Office	<u>q</u> a	2:00 PM
							Out. Fac:		<u>q</u> 0	1:45
						Cxi	Con.Type:	Face to Face	<u>q</u> f	3:45 PM
						Clear	Арр.Туре:	Scheduled	<u>q</u> 1	EBP/SS
						Save		Not Applicable	<u>q</u> x	
					-	Delete	Int. Type:	NOT APPLICABLE	QN	
<u>R</u> esolve Group	Canc	el Group	P <u>o</u> st Gr	oup	<u>B</u> illing F	Pro Forma		Event <u>L</u> og <u>P</u> rint	Payment	Exjt



EDIT GROUP SERVICE EVENT

• Right click on the group service to be edited, and click "Edit Group Service" from the drop down menu



- An "Add/Edit Group Service Scheduled for [Staff Person's Name]" screen appears
- Make the appropriate change(s) to the top container and click "Save"

Add/Edit Group Service Scheduled for CLINICAL, STAFF (Full Access)								
Event	G This Normal Event is Scheduled	d for Today.						
Subject:	REHAB-GROUP 35							
Date:	10/14/2014	Start Time: 2:00 PM Duration: 2:00 Stop Time: 4:00 PM						
Unit	TRAINING UNIT	9900 Comment: GROUP WILL EDUCATE CLIENTS ON HOW TO	Save					
Sub Unit:	TRAINING SUBUNIT	STABLISH AND MAINTAIN A MEDICATION CALENDAR.	Delete					
Location:	TRAINING LOCATION		Clear					

• Make any appropriate change(s) to the "Server" container and click "Save"

Scheduled Actua	l)								
Servers						Staff	CLINICAL, STAFF		
Staff	Service			Lead 🔺			REHAB-GROUP 35	35	
CLINICAL, STAFF	35	02:00 PM	03:45 PM		Add	Start:	2:00 PM Duration: 2:00	Stop: 4:00 PM	
					Save		Lead Staff during Time Period?		
				-	Delete	Supervisor:		<u> </u>	

Clients Client: FAKE, TEST বা Q Client Start Time End Time C... Cxl 🔺 Pr... Unit: TRAINING UNIT Q 9900 Assign Unit FAKE, TEST 0.00 02:00 PM 04:00 PM 🔲 🗖 9900/9901 SUnit: TRAINING SUBUNIT Q 9901 Transportation Required Prov. To: Client 미미 Start/Dur/Stop 2:00 PM Prov. At: School QS Out. Fac: MASON ELEMENTARY-SD **Q** 547 2:00 Con.Type: Face to Face QF 4:00 PM Cal EBP/SS App.Type: Scheduled <u>q</u> 1 Add Bill, Type: Not Applicable QX Save Int. Type: NOT APPLICABLE QN Delete

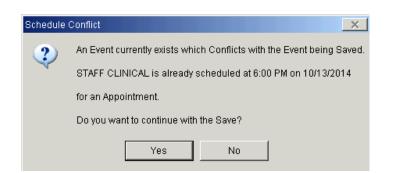
Make any appropriate change(s) to the "Client" container and click "Save"

•

• When the "Update Attendee and Calendar Records?" dialog box appears, click "Proceed with Save"

Update Attendee and Calendar Records?	×
 Update all attendee and calendar records with new event time Update only those attendee and calendar records whose time no longer falls within the new ever 	nt time
Proceed with <u>Save</u> Cancel S	ave

• If there is a schedule conflict, the "Schedule Conflict" dialog box appears. Click "Yes" to save changes or "No" to review and correct before saving



• If no other changes are required, select "Exit"

<u>R</u> esolve Group	Cancel Group	P <u>o</u> st Group	<u>B</u> illing Pro Forma	Event <u>L</u> og	<u>P</u> rint	Payment	Exit

NOTE: A scheduled group service cannot be edited to become a "Standing Group"



CANCELLING ONE CLIENT IN A GROUP

• Right click on the group event, and click "Edit Group Service"

Sun 09/28/2014	Mon 09/29/2014	Tue 09/30/2014	Wed 10/01/2014	Thu 10/02/2014
G	New Appoint New Individu New Individu New Group S	al Service al Service (Version Q)		
	New Recurrin	g Appointment g Individual Service up Maintenance		
	Edit Group Se Show Group S Launch Billing	Service		

NOTE: If "Cancel" is selected from the drop down menu instead of "Edi Group Service", there is a risk of cancelling the entire group

• The service screen appears. Click on the client you wish to cancel so that it is highlighted, and click "Cxl"

Clients							
Client	Pr	Start Time	End Time	C	CxI	*	
216, TEST	0.00	06:00 AM	06:45 AM				
TEST, FAKE	0.00	06:00 AM	06:45 AM				
							Cxl Add
							Save
						-	Delete

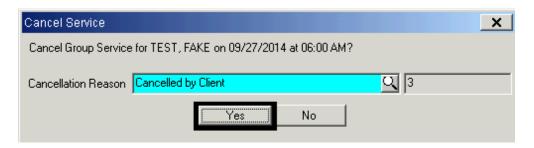
• The "Cancel Service" dialog box appears. Click the magnifying glass to access the "Cancellation Reason" table

Cancel Service				×
Cancel Group Service for TEST, FA	KE on 09/27/2014	at 06:00 AM?		
Cancellation Reason			<u>q</u>	
	Yes	No		

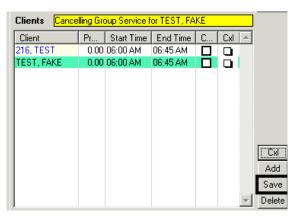
• Click on the appropriate "Cancellation Reason", and click "OK"

Cancella	tion Reasons Lookup				×
ID	Description				
3 4	Cancelled by Client Cancelled by Program	n	 		
7	Left Before Service F				
5	No Show				
					_
 Act 	ive C Inactive	O All	<u>F</u> ind	<u>0</u> K	Cancel

• Click "Yes" to confirm the cancellation



- Scheduler
- When there are multiple clients in the group, a yellow message box appears confirming that the client was cancelled. Click "Save"



• The pink checkmark appears in the "Cxl" column next to the client's name. Click "Exit" to return to Scheduler Maintenance- Multi Day

Clients				or i	TEST, FAKE	Q	
Client	Pr Start Time	End Time C	Cxl 🔺	Client:			<u> </u>
216, TEST	0.00 06:00 AM	06:45 AM	<u>a</u>	Unit	TRAINING UNIT	9900	Assign Unit
TEST, FAKE	0.00 06:00 AM	06:45 AM	(<u>d</u>)	SUnit	TRAINING SUBUNIT	9901	9900/9901
			\sim		Transportation Required		
				Prov. To:	Client and Family	<u> </u>	Start/Dur/Stop
				Prov. At:	Other Community/Field Unspec	모ㅇ	6:00 AM
				Out. Fac:			0:45
			Un-C>	Con.Type:	Face to Face	<u>q</u> f	6:45 AM
			Add	App.Type:	Cancelled by Client	Q 3	EBP/SS
			Save	Bill. Type:	Not Applicable	<u>q</u> x	
			T Delete	- Lus Turner	NOT APPLICABLE	<u>q</u> n	
1							
<u>R</u> esolve Group	Cancel Group	Post Group	Billing Pro Forn	ia	Event <u>L</u> og <u>P</u>	rint Payment	Exit



UNCANCELLING ONE CLIENT IN A GROUP

NOTE: The only reason you would uncancel is if you cancelled by mistake

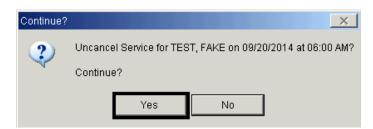
• Right click on the group event, and click "Edit Group Service" from the drop down menu

Sun 09/28/2014	Mon 09/29/2014	Tue 09/30/2014	Wed 10/01/2014	Thu 10/02/2014
	New Appointr New Individua New Individua New Group Se	al Service al Service (Version Q)		
	New Recurring	g Appointment g Individual Service up Maintenance		
	Edit Group Ser Show Group S Launch Billing	ervice		

• The service screen appears. Highlight the name of the client you wish to uncancel. Click the "Un-Cxl" button found above the "Add" button

Clients									TECT FARE	-	0		
Client	Pr	Start Time	End Time	C	CxI	-		Client:	TEST, FAKE		<u>q</u>		
216, TEST	0.00	06:00 AM	06:45 AM					Unit	TRAINING U	JNIT	Q	9900	Assign Unit
TEST, FAKE	0.00	06:00 AM	06:45 AM		1			SUnit	TRAINING S	SUBUNIT	<u>q</u>	9901	9900/9901
									Transport 🗌	tation Require	đ		
								Prov. To:	Client and Fa	amily		<u> </u>	Start/Dur/Stop
								Prov. At:	Other Comm	unity/Field Un	spec	90	6:00 AM
								Out. Fac:				Q 0	0:45
							Un-Cxl	Con.Type:	Face to Face	е		QF	6:45 AM
							Add	Арр.Туре:	Cancelled by) Client		Q 3	EBP/SS
							Save	Bill. Type:	Not Applicab	le		QX	
						-	Delete	Int. Type:	NOT APPLIC	CABLE		<u> </u>	
<u>R</u> esolve Group	Car	ncel Group	P <u>o</u> st Gr	oup	Bill	ing F	^p ro Forma			Event <u>L</u> og	<u>P</u> rint	Payment	Exit

• The "Continue" dialog box appears. Click "Yes"



• The pink checkmark in the "Cxl" column next to the client's name disappears. Click "Exit" to return to Scheduler Maintenance- Multi Day

Clients				or i	TEST, FAKE		01
Client	Pr Start Time	End Time C	Cxl 🔺	Olione.			
216, TEST	0.00 06:00 AM	06:45 AM 🔲		Unit	TRAINING UNIT	9900	Assign Unit
TEST, FAKE	0.00 06:00 AM	06:45 AM 🛛 🗖		SUnit	TRAINING SUBUNIT	9901	9900/9901
			\sim		Transportation Required		
				Prov. To:	Client and Family	<u> </u>	Start/Dur/Stop
				Prov. At:	Other Community/Field Unspec	고	6:00 AM
				Out, Fac:		<u> </u>	0:45
			Cxl	Con.Type:	Face to Face	<u> </u>	6:45 AM
			Add	App.Type:	Scheduled	<u>q</u> 1	EBP/SS
			Save		Not Applicable	<u>a</u> x	
			Delet	- Lut Turner	NOT APPLICABLE	<u>q</u> n	
1		I					
<u>R</u> esolve Group	Cancel Group	Post Group	Billing Pro For	na	Event <u>L</u> og <u>P</u> rint	Payment	Exit



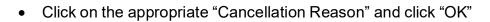
CANCELLING THE ENTIRE GROUP SERVICE EVENT

• Right click on the group service you wish to cancel, and click "Cancel" from the drop down menu

Sun 09/28/2014	Mon	09/29/2014	Tue 09/30/2014	Wed 1	0/01/2014	Thu 10/02/2014
	G	New Appoint New Individu New Individu New Group S	ual Service ual Service (Version Q)			
		New Recurrin	ng Appointment ng Individual Service pup Maintenance			
		Edit Group Se Show Group Launch Billin	Service			
		Delete Print Resolve				
		Cancel				

• The service screen and the "Cancel Service" dialog box appear. Click the magnifying glass to access the "Cancellation Reason" table

Cancel Service				×					
Cancel Group Services for this Event on 09/29/2014 at 06:00 AM?									
Cancellation Reason	Yes	No							



ancellat	ion Reasons Lookup	×
ID	Description	
3	Cancelled by Client	
4	Cancelled by Program	
7	Left Before Service Provided	
5	No Show	
		-
Activ	ve C Inactive C All <u>F</u> ind	<u>D</u> K Ca <u>n</u> cel

• Click "Yes" to confirm the cancellation

Cancel Service	8
Cancel Group Services for this Event on 09/29/2014 at 06:00 AM?	
Cancellation Reason Cancelled by Client 2	
Yes No	

• In the "Client" container, pink checkmarks appear in the "Cxl" column next to each client's name. Click "Exit" to return to Scheduler Maintenance- Multi Day. The service event is removed from the calendar

Clients					~		Client:	TEST, FAKE	Q		Q
Client	Pr	Start Time	End Time	C	Cxi 🔺		enerra.			0000	
216, TEST	0.00	06:00 AM	06:45 AM		1		Unit:	TRAINING UNIT	<u> </u>	9900	Assign Unit
TEST, FAKE	0.00	06:00 AM	06:45 AM		1		SUnit	TRAINING SUBUNIT	<u>q</u>	9901	9900/9901
								Transportation Required			
							Prov. To:	Client and Family		Q B	Start/Dur/Stop
							Prov. At:	Other Community/Field Unsp	ec	90	6:00 AM
							Out, Fac:				0:45
						Un-Csl	Con.Type:	Face to Face		<u>q</u> F	6:45 AM
						Add	Арр.Туре:	Cancelled by Client		Q 3	EBP/SS
						Save		Not Applicable		QX	
					-	Delete	Int. Type:	NOT APPLICABLE			
,			1								
<u>R</u> esolve Group	Unca	ancel Group	P <u>o</u> st Gr	oup	<u>B</u> illing	Pro Forma		Event <u>L</u> og	<u>P</u> rint	Payment	Exit



UNCANCELLING THE ENTIRE GROUP SERVICE EVENT

NOTE: The only reason you would uncancel is if you cancelled by mistake

• Right click on the service you wish to uncancel. Click "Cancel" from the drop down menu

Sun 09/28/2014	lon 09/29/2014 Tue 09/30/20	14 Wed 10/01/2014	Thu 10/02/2014
Go	New Appointment New Individual Service New Individual Service (Versio New Group Service	n Q)	
	New Recurring Appointment New Recurring Individual Serv Standing Group Maintenance	ice	
	Edit Group Service Show Group Service Launch Billing Pro Forma		
	Delete Print Resolve		
•	Cancel Pre-Pay Check In		4

- The service event screen appears. The pink checkmark automatically disappears from the "Cxl" column next to the client's name
- Click "Exit" to return to Scheduler Maintenance- Multi Day

Clients			$\mathbf{\wedge}$				
Client 216, TEST TEST, FAKE	Pr Start Time 0.00 06:00 AM 0.00 06:00 AM	End Time C 06:45 AM 06:45 AM	Add Save	Unit: SUnit: Prov. To: Prov. At: Out. Fac: Con.Type: App.Type: Bill. Type:	TEST, FAKE TRAINING UNIT TRAINING SUBUNIT Transportation Required Client and Family Other Community/Field Unspec Face to Face Scheduled Not Applicable NOT APPLICABLE	Q 9900 Q 9901 Q 9901 Q 8 Q 0 Q 0 Q 7 Q 7 C	Assign Unit 9900/9901 Start/Dur/Stop 6:00 AM 0:45 6:45 AM EBP/SS
<u>R</u> esolve Group	Cancel Group	P <u>o</u> st Group	<u>B</u> illing Pro Forma		Event Log Pr	int Payment	Exit

Scheduler

• The service event appears on the schedule with the pink X removed, which indicates that the service has been uncancelled

Sun 09/28/2014 Mon 09/29/2014	Tue 09/30/2014	Wed 10/01/2014
C 0:00am REHAB-G		
\smile		



STANDING GROUP MAINTENANCE (NEW)

• Right click in the column of the day to be scheduled, and click "Standing Group Maintenance"

🛐 Multi Day View					<u> </u>
🗳 🥔 🖪 🔳	3 5 7 14 31 .			A I C Ø Ø	📰 🔲 💽 🔛 🔛
Entity Type: S - Staff	Entity:	CLINICAL, STAFF	<u>Q</u>	Locations: All	<u>q</u>
Tue 11/04/2014	New Appoint New Individu New Individu	al Service al Service (Version	G)	Sat 11/08/2014	September 2014 ► S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 30 <t< th=""></t<>
	New Recurri	Service ng Appointment ng Individual Servic oup Maintenance	e		● October 2014 ● S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31
1					November 2014 ► S M T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30

• An "Add/Edit Standing Group" screen appears

Add/Edit Stan	nding Group (Administrative Access)	×
Main Sch	hedule	
ID:	: Description:	
Unit :		
SubUnit:		
Location:		
Slots:	s: 0	
	Comments:	
		A
		~
	<u>S</u> ave Cjear <u>D</u>	elete
<u>R</u> ules of Rec	currence	Cancel

• To create a new group, type a group ID in the "ID:" field. The group ID is the unit number followed by a three character abbreviation (i.e. 9900ART). Press the tab key on the keyboard and additional fields will open

Add/Edit Stan	ding Group (Admir	istrative Access)				×
Main Sch	edule					
ID:	9900ART Q	Description:				
Unit : SubUnit:			<u>q</u>]	
			<u>୍</u> ୟୁ		-	
Location: Slots:			2	J		
	Comments:					
						×
				<u>S</u> ave	Clear	Delete
<u>R</u> ules of Rec	urrence					Ca <u>n</u> cel

• Enter the "Unit", "SubUnit", "Location", and "Slots" (ideal number of clients for this group). Any additional information may be entered in the "Comments" field. Click "Save"

Add/Edit Stan	ding Group (Administrative Access)	×
Main Sch	edule	
ID:	9900ART Q Description: 9900 ART THERAPY CLASS	
Unit :	TRAINING UNIT	
SubUnit:	TRAINING SUBUNIT	
Location:		
Slots:	10	
	Comments:	
		×
	<u>S</u> ave Clear	<u>D</u> elete
<u>R</u> ules of Rec	urrence	Ca <u>n</u> cel

• Click "Rules of Recurrence"

Add/Edit Stand	ding Group (Administrative Access)	x
Main Sche	edule	
ID:	9900ART Q Description: 9900 ART THERAPY CLASS	
Unit :	TRAINING UNIT	
SubUnit:	TRAINING SUBUNIT	
Location:	TRAINING LOCATION	
Slots:	10	
	Comments:	
] [
		-
	<u>S</u> ave Clear <u>D</u> elete	
<u>R</u> ules of Recu	urrence Ca <u>n</u> c	cel

• Complete the prompts by entering the appropriate information, and click "Build".

Rules of Recurrence
Start Time: 4:00 PM Duration 2:00 End Time: 6:00 PM
C Daily Recur Every 1 week(s) on: Image: Weekly Image: Sunday Image: Tuesday Image: Wednesday Image: Monthly Image: Thursday Image: Friday Image: Saturday
Start Date: 11/05/2014 C End After C End By
<u>B</u> uild Clear Ca <u>n</u> cel

NOTE: The "Start Date" of the recurring appointment must be the date of the first scheduled appointment. Do not exceed 90 days when setting the "Rules of Recurrence" in the "End After" or "End By" fields

• The "Schedule" tab activates on the "Add/Edit Standing Group" window. Click "Edit Group"

ID: 9900ART	Description: 9900 ART	THERAPY CLASS		Slots: 10			
Startdate	Day	Starttime	Endtime				
11/05/2014 11/12/2014 11/19/2014	WEDNESDAY WEDNESDAY WEDNESDAY	04:00 PM 04:00 PM 04:00 PM	06:00 PM 06:00 PM 06:00 PM				
Our Unresolved Only	y C All Copy Date:		Add Group	Edit Group			

- The "Add/Edit Group Service" screen activates. Enter the necessary information in the top container, "Servers" container, and "Clients" container
- Once finished, click "Exit"

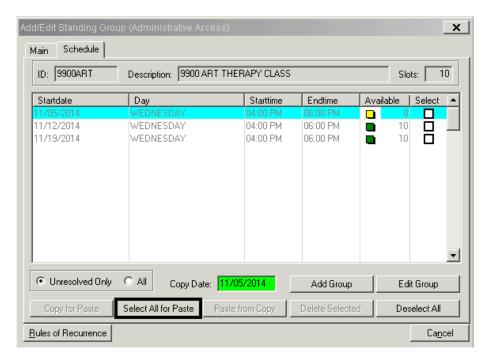
Add/Edit Gi	oup Service (Admi	inistrative Acce	ess)							×
Event	G This Recurri	ing Event will Oc	cur in the Future. S	Standing (Group ID: 99	DOART				
Subject:	9900 ART THERAP	PY CLASS								
Date:	11/05/2014		Start Ti	ime: 4:00	D PM	Duration: [2:00	Stop Time	: 6:00 PM	
Unit:	TRAINING UNIT		<u></u>	9900 Co				· ·		 Save
Sub Unit:	TRAINING SUBUN	IT	9901						_	Delete
Location:	TRAINIG LOCATIO	N	Q 1							Clear
Scheduled	Actual									
Servers					Staff:					
Staff	Service 9	Start Time Enc	l Time 🛛 Lead 🔺		Service:				<u> </u>	0
				Clear	Start:	4:00 PM	Duration: 2:0	0	Stop: 6:00 F	M
				Save		🔲 Lead Staf	f during Time F	Period?		
			-	Delete	Supervisor:				Q	0
Clients					Client:			<u></u>	0	9
Client	Pr Start	Time End Tim	e C Cxl 🔺			TRAINING U		<u>व</u>		
						TRAINING SU			9901	Assign Unit
					001110	,	tion Required		, ,	
					Prov. To:	Client				Start/Dur/Stop
					Prov. At:	, 				4:00 PM
					Out. Fac:				মাঁত	2:00
				Cxl	Con.Type:	Face to Face			QF	6:00 PM
				Clear	Арр.Туре:	Scheduled			Q 1	EBP/SS
				Save		Not Applicable			QX	
			-	Delete	Int. Type:	NOT APPLICA	ABLE			
			Course 1 parts		1			Dia 1	Davies 1	E-ià
<u>R</u> esolve (iroup Cancel Gr	oup Post	Group <u>B</u> illing F	Pro Forma	1		Event Log	<u>P</u> rint	Payment	Exit

ain Schedule								
ID: 9900ART Description: 9900 ART THERAPY CLASS								
Startdate	Day	Starttime	Endtime	Available Select -				
1/05/2014	WEDNESDAY WEDNESDAY	04:00 PM 04:00 PM	06:00 PM 06:00 PM					
1/19/2014	WEDNESDAY	04:00 PM	06:00 PM					
 Unresolved Only Copy for Paste 			Add Group	Edit Group				
	Select All for Paste Pa	iste from Copy	Delete Selecte	d Deselect All				

• The "Schedule" tab on the "Add/Edit Standing Group" window activates

• To copy the staff and clients from the first date into the remaining dates, mark the check box in the "Select" column for the first date. The "Copy for Paste" button activates. Click "Copy for Paste"

d/Edit Standing Gro _{Main} Schedule	up (Administrative Access)			
ID: 9900ART	Description: 9900 ART TH	HERAPY CLASS		Slots: 10
Startdate	Day	Starttime	Endtime	Available Select -
11/05/2014 11/12/2014 11/19/2014	WEDNESDAY WEDNESDAY WEDNESDAY	04:00 PM 04:00 PM 04:00 PM	06:00 PM 06:00 PM 06:00 PM	
Our Unresolved Only	C All Copy Date:		Add Group	Edit Group
Copy for Paste	Select All for Paste Pas	te from Copy	Delete Selected	Deselect All
ules of Recurrence				Ca <u>n</u> cel



• The "Select All for Paste" button activates. Click "Select All for Paste"

• The remaining check boxes in the "Select" column are automatically checked. The "Paste from Copy" button activates. Click "Paste from Copy"

ID: 9900ART	Description: 9900 ART	THERAPY CLASS		Slots: 10
Startdate	Day WEDNESDAY	Starttime 04:00 PM	Endtime	Available Select
11/12/2014 11/19/2014	WEDNESDAY WEDNESDAY	04:00 PM 04:00 PM	06:00 PM 06:00 PM	
Unresolved Onl	y C All Copy Date:	11/05/2014	Add Group	Edit Group

• The staff, clients, service code, etc. from the initial group set-up are now copied to the remaining recurring groups. Click "Cancel". This automatically applies the rules of recurrence and includes clients for the group on the staff schedule(s)

dd/Edit Standing Gro Main Schedule	oup (Administrative Access)			ļ	×
ID: 9900ART	Description: 9900 ART T	HERAPY CLASS		Slo	ots: 1	0
Startdate 11/05/2014	Day WEDNESDAY	Starttime 04:00 PM	Endtime 06:00 PM	Available	Select	
11/12/2014	WEDNESDAY	04:00 PM	06:00 PM	8		
11/19/2014	WEDNESDAY	04:00 PM	06:00 PM	8		
						•
Unresolved Only	C All Copy Date:		Add Group	Ed	it Group	
Copy for Paste	Select All for Paste Pas	ste from Copy	Delete Selected	i De:	select All	
<u>Rules of Recurrence</u>					Ca <u>n</u> c	cel



STANDING GROUP MAINTENANCE (EXISTING)

NOTE: When editing from the "Standing Group Maintenance Screen", never change the description of the group

• To reuse a group ID and description, right click on any date and select "Standing Group Maintenance" from the drop down menu

🜆 Multi Day View						
🛛 🗢 🎒 🚺	3 5 7 1	31		DDD	T	IC M M
Entity Type: S · Staf	f 🔽	Entity	CLINICAL, STAFF	<u>a</u>		Locations: All
Tue 11/04/2014	Wed 11/05/2		Thu 11/06/2014	Fri 11/07/20	014	Sat 11/08/2014
	C 04:00pm 9	Nev Nev Nev Nev Nev	v Appointment v Individual Service v Individual Service (Ve v Group Service v Recurring Appointme v Recurring Individual 3 nding Group Maintenar	ent Service		
		Sho Edit	Standing Group w Standing Group Series nch Billing Pro Forma		-	

• The "Add/Edit Standing Group" screen appears. Enter the ID of the group and press the tab button on the keyboard. The fields will populate with the group information

Add/Edit Stand	ing Group (Administrative Access)	×
Main Sche	dule	
ID:	9900ART Oescription: 9900 ART THERAPY CLASS	
Unit :	TRAINING UNIT	
SubUnit	TRAINING SUBUNIT	
Location:	TRAINING LOCATION 1	
Slots:	10	
	Comments:	
		_
		~
	Save Clear	<u>D</u> elete
<u>R</u> ules of Recu	irence	Ca <u>n</u> cel

Scheduler

ID: 9900ART	Description: 9900 ART	THERAPY CLASS		Sle	ots: 10
Startdate	Day	Starttime	Endtime	Available	Select
11/05/2014 11/12/2014	WEDNESDAY WEDNESDAY	04:00 PM 04:00 PM	06:00 PM 06:00 PM		
11/19/2014	WEDNESDAY	04:00 PM	06:00 PM		
	C All Copy Date:		Add Group	1 -	lit Group

• Click on the "Schedule" tab, and click on "Rules of Recurrence"

• Enter a start date that does not overlap with a previous date for that group. Fill in the remaining fields as appropriate and click "Build"

ules of Recurrence Start Time: <mark>4:00</mark>	
C Daily Weekly C Monthly	Recur Every 1 week(s) on: Sunday Monday Tuesday Vednesday Thursday Friday Saturday
Start Date: 11/2	6/2014 C End After C Cocurrences
	<u>B</u> uild Clear Ca <u>n</u> cel

ID: 9900ART	Description: 9900 ART	THERAPY CLASS		Slots: 10
Startdate	Day	Starttime	Endtime	Available Select
11/05/2014	WEDNESDAY	04:00 PM	06:00 PM	
11/12/2014	WEDNESDAY	04:00 PM	06:00 PM	D 8 📇
11/19/2014	WEDNESDAY	04:00 PM	06:00 PM	■ 8 (☑)
11/26/2014	WEDNESDAY	04:00 PM	06:00 PM	10 Y
Unresolved Only	C All Copy Date:		Add Group	Edit Group

• To copy the clients and staff to the new dates, select the date you wish to copy, and mark the check box. The "Copy for Paste" button activates. Click "Copy for Paste" • Mark the check boxes for the dates you wish the copy the information into. Click "Paste from Copy"

ID: 9900ART	Description: 9900 AF	T THERAPY CLASS		Slots: 10
Startdate	Day	Starttime	Endtime	Available Select
11/05/2014	WEDNESDAY	04:00 PM	06:00 PM	
11/12/2014	WEDNESDAY	04:00 PM	06:00 PM	B 2 3
11/19/2014	WEDNESDAY	04:00 PM	06:00 PM	• · 🕰 🛛
11/26/2014	WEDNESDAY	04:00 PM	06:00 PM	
12/03/2014	WEDNESDAY	04:00 PM	06:00 PM	
Unresolved Onl	y C All Copy Date:	11/19/2014	Add Group	Edit Group

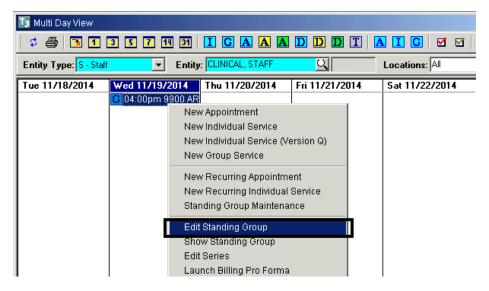
• The staff, clients, service code, etc. from the initial group set-up are now copied to the new recurring groups. Click "Cancel". This automatically applies the rules of recurrence and includes clients for the group on the staff schedule(s)

ID: 9900ART	Description: 9900 ART	THERAPY CLASS		Slots: 10
Startdate	Day	Starttime	Endtime	Available Select
11/05/2014	WEDNESDAY	04:00 PM	06:00 PM	8
11/12/2014	WEDNESDAY	04:00 PM	06:00 PM	□ 8 □
11/19/2014	WEDNESDAY	04:00 PM	06:00 PM	□ 8 □
11/26/2014	WEDNESDAY	04:00 PM	06:00 PM	□ <u>8</u> □
12/03/2014	WEDNESDAY	04:00 PM	06:00 PM	
Unresolved Only	O All Copy Date:		Add Group	Edit Group



EDIT ONE GROUP SERVICE EVENT

• Right click on the Standing Group in the staff person's schedule, and click "Edit Standing Group"



• The "Add/Edit Group Service" screen appears. Make the appropriate changes, click "Save", respond to the dialog box, and then click "Exit"

Add/Edit G	roup Service	Scheduled	d for CLINIC	AL, ST	TAFF	(Fu	II Acces	s)					X
Event	G This F	Recurring Ev	vent will Occu	ur in the	e Futu	re. S	tanding (Group ID: 99	OQART				
Subject:	9900 ART TH	IERAPY CL	ASS										
Date:	11/19/2014	•			Sta	ırt Tii	me: 4:00) PM	Duration:	1:00	Stop Tim	e: 5:00 PM	
Unit	TRAINING U	NIT		C	1		9900 C	omment:					Save
Sub Unit:	TRAINING S				X [99	01							Delete
Location:	HHSA MH BI	LLING UNI	T	C	1							-	Clear
Scheduled Actual													
Servers								Staff	CLINICAL, S	STAFF		অ	
Staff	SE STAFE 35		endee and i				rds?		<u>, </u>			×	35
CLINICAL	, 5 I AFF 50												M
		Upda	ate all attende	ee and	calen	dar r	ecords w	ith new ever	nt time				
		O Upda	ate only those	e attend	lee ar	nd ca	alendar re	cords whose	e time no longe	er falls within th	ne new event	time	0
Clients Client	Pr								Proceed	with Save	Cancel Sa		Q
FAKE, TE	ST 0.00	04.00 FIM	03.00 FM					11,000					Assign Unit
TEST, FA	KE 0.00	04:00 PM	05:00 PM					SUnit:	TRAINING S			9901	9900/9901
										ation Required	1		
								Prov. To:	·			모더	Start/Dur/Stop
								Prov. At:	Office			QA	4:00 PM
								Out. Fac:					1:00
							Cxi		Face to Face	•			5:00 PM EBP/SS
							Add		Scheduled Not Applicab	la			EBF/35
							Save		NOT APPLIC				
						Ψ.	Delete	m. Type.	pror Arruc			2014	
<u>R</u> esolve (aroup Car	icel Group	Post G	roup	Bill	ing F	Pro Forma			Event Log	<u>P</u> rint	Payment	Exit

- Scheduler
- If the "Schedule" tab is reopened. (Right click, "Edit Series"). It is observed that the changes are only applied to the selected group. Click "Cancel"

🔢 Multi Day View						_ [×
🕴 🥔 🖪 🔳	3 5 7 14 31		DDDT	A I C M M	🛅 🖻 (🔹 🔛 🗊	P
Entity Type: S - Staff	Entity	CLINICAL, STAFF	<u>a</u>	Locations: All		Q	
Sun 11/16/2014	Mon 11/17/2014	Tue 11/18/2014			sion Q) t	28 29 30 vember 201- T W T 4 5 6 11 12 13 18 19 20	F S 3 4 10 11 17 18 24 25 31

ID: 9900ART Description: 9900 ART THERAPY CLASS S							
Startdate	Day	Starttime	Endtime	Available Select			
1/05/2014	WEDNESDAY	04:00 PM	06:00 PM	D 8 D			
1/12/2014	WEDNESDAY	04:00 PM	06:00 PM	8			
1/19/2014	WEDNESDAY	04:00 PM	05:00 PM				
1/26/2014	WEDNESDAY	04:00 PM	06:00 PM				
2/03/2014	WEDNESDAY	04:00 PM	06:00 PM	B 1			
- ·· · · · · ·	C						
Unresolved Only	y 🔿 All 🛛 Copy Date: 🗍		Add Group	Edit Group			



EDIT SERIES OF GROUP SERVICE EVENTS

NOTE: When editing a standing group, do not select the "Rules of Recurrence" button because you will create a new group instead of editing the existing group

NOTE: When editing a standing group, do not change the description of the group because the series will disappear

• Right click on the Standing Group in the staff person's schedule, and click "Edit Series"

🖪 Multi Day View					_ D X
🕫 🎒 🖪 🚺	3 5 7 14 31		DDDT	A I G 🗹 🗹	🛅 🖻 🖾 🖼 🗊
Entity Type: <mark>S - Staf</mark>	f 🗾 Entity	CLINICAL, STAFF	<u>a</u>	Locations: All	9
Sun 11/16/2014	Mon 11/17/2014	Tue 11/18/2014	Nev Nev Nev Nev Star Edit Sho	Thu 11/20/2014 Very Appointment Very Ap	21 22 23 24 25 28 29 30 31 t ervice wember 2014

• The "Add/Edit Standing Group" screen appears. Click on the "Schedule" tab

Add/Edit Stand	iding Group (Administrative Access)	×
Main Sche	redule	
ID:	9900ART Q Description: 9900 ART THERAPY CLASS	
Unit:		
SubUnit: Location:		
Slots:		
	Comments:	
		<u> </u>
	1	
	Save Clear Dele	te
		<u> </u>
<u>R</u> ules of Recu	Ca	ancel

• The list of scheduled groups displays. Click the date of the group to be edited, and click "Edit Group"

ID: 9900ART	Description: 9900 ART	THERAPY CLASS		Slots: 10
Startdate	Day	Starttime	Endtime	Available Select
11/12/2014 11/19/2014 11/26/2014 12/03/2014	WEDNESDAY WEDNESDAY WEDNESDAY WEDNESDAY	04:00 PM 04:00 PM 04:00 PM 04:00 PM	06:00 PM 05:00 PM 06:00 PM 06:00 PM	
Unresolved Onl	y C All Copy Date:		Add Group	Edit Group

• The "Add/Edit Group Service" screen appears. Make the appropriate changes, click "Save", and click "Exit"

Add/Edit G	roup Se	rvice (Ac	Iministr	ative Acce	ss)								X
Event	G	This Rec	urring Ev	ent will Oco	ur in th	ie Future.	Standing (Group ID: 99	DOART				
Subject:	9900 A	RT THEF	RAPY CL	ASS									
Date:	11/05/	2014	1			Start '	Time: 4:00	D PM	Duration:	2:00	Stop T	ime: 6:00 PM	
Unit	TRAIN	ING UNIT	1		5	ন	9900 C						- Save
Sub Unit:	TRAIN	ING SUB	UNIT		5	J 9901						-	Delete
Location:	HHSA	MH BILLI	NG UNIT	ſ	<u>(</u>	21							Clear
Schedule	Scheduled Actual												
Servers							_	Staff:	CLINICAL,	STAFF		9	
Staff CLINICAL	CTAFE		Start T			Lead]		REHAB-GR			<u> </u>	35
CLINICAL	, STAFF	30	U4.UU F	141 06.00			Add	Start:	4:00 PM	Duration: 2	:00	Stop: 6:00 F	PM
							Save		Lead Sta	aff during Time	Period?		
							Delete	Supervisor:	<u> </u>			미	0
Clients					1-	1 - 1	-	Client:	FAKE, TEST			য	9
Client FAKE, TE		Pr St 0.00 04:	art Time 00 PM	End Time		Cxl 🔺	1		TRAINING L			J 9900	Assign Unit
TEST, FA		0.00 04:		06:00 PM	ö	ă		SUnit	TRAINING S	OBUNIT)	9901	9900/9901
									Transport	ation Required	ł		
								Prov. To:	Client			QC	Start/Dur/Stop
									Homeless/Er	merg Shelter		QE	4:00 PM
								Out. Fac:					2:00
							Cxl	Con. Type: App. Type:	Face to Face Schodulod	9			6:00 PM EBP/SS
							Add		Not Applicab	le			
							Save Delete		NOT APPLIC				
<u>R</u> esolve	Group	Cancel	Group	Post (iroup	Billing	Pro Forma			Event Log	<u>P</u> rint	Payment	Exit

S _C	heduler
	"eduler

ID: 9900ART	Description: 9900 ART	THERAPY CLASS		Slots: 10
Startdate	Day	Starttime	Endtime	Available S <u>elec</u> t 🔺
1/12/2014 1/19/2014 1/26/2014 2/03/2014	WEDNESDAY WEDNESDAY WEDNESDAY WEDNESDAY	04:00 PM 04:00 PM 04:00 PM 04:00 PM 04:00 PM	06:00 PM 05:00 PM 06:00 PM 06:00 PM	
Unresolved Onl	y C All Copy Date:		Add Group	Edit Group

• The "Schedule" tab reopens. To replicate the same changes to other dates, select the date of the changed group from the list, and mark the check box. The "Copy for Paste" button activates. Click "Copy for Paste"

• The "Select All for Paste" button activates. Click "Select All for Paste"

ID: 9900ART	Description: 9900 ART	THERAPY CLASS		Slots: 10
Startdate	Day	Starttime	Endtime	Available Select 4
11/05/2014	WEDNESDAY	04:00 PM	06:00 PM	8
11/12/2014	WEDNESDAY	04:00 PM	06:00 PM	B 2 4
11/19/2014	WEDNESDAY	04:00 PM	05:00 PM	□ 8 □
11/26/2014	WEDNESDAY	04:00 PM	06:00 PM	
12/03/2014	WEDNESDAY	04:00 PM	06:00 PM	□ 8 □
Unresolved Onl	y C All Copy Date:	11/05/2014	Add Group	Edit Group

ID: 9900ART	Description: 9900 ART	THERAPY CLASS		Slots: 10
Startdate	Day	Starttime	Endtime	Available Select
11/05/2014 11/12/2014 11/19/2014 11/26/2014 12/03/2014	WEDNESDAY WEDNESDAY WEDNESDAY WEDNESDAY	04:00 PM 04:00 PM 04:00 PM 04:00 PM 04:00 PM	06:00 PM 06:00 PM 05:00 PM 06:00 PM 06:00 PM	
Unresolved On	ily 🔿 All 🛛 Copy Date: 🛉	11/05/2014	Add Group	Edit Group

• The remaining check boxes in the "Select" column are automatically checked. The "Paste from Copy" button activates. Click "Paste from Copy"



• The staff, clients, and service code from the initial group set-up are now copied to the remaining recurring groups. Click "Cancel"

ID: 9900ART	Description: 9900 ART	THERAPY CLASS		Slots: 10
Startdate	Day	Starttime	Endtime	Available Select
11/05/2014	WEDNESDAY	04:00 PM	06:00 PM	□ 8 □
11/12/2014	WEDNESDAY	04:00 PM	06:00 PM	□ 8 □
11/19/2014	WEDNESDAY	04:00 PM	06:00 PM	8
11/26/2014	WEDNESDAY	04:00 PM	06:00 PM	□ 8 □
12/03/2014	WEDNESDAY	04:00 PM	06:00 PM	
				-
Unresolved Onl	C All Copy Date:		Add Group	Edit Group
Unresolved Only	y 🔿 All 🛛 Copy Date: 🛛		Add Group	Edit Group
Unresolved Only	V C All Copy Date:		Add Group	Edit Group

NOTE: If an event in a series has previously been changed and staff makes a change to another event in the series and copies that change to the rest of the series, the change made to the first event will be lost. The new change must be copied to only the events of the series that have not been altered. Previous changed events must be individually edited with the new information. Because of this, it is recommended that only one person per program manages standing groups



RECUR EXPIRED STANDING GROUP

• Right click on the Standing Group in the staff person's schedule, and click "Edit Series"

🜆 Multi Day View					_ 🗆 X
🕴 😂 🖪 🚺	3 5 7 14 31		DDDT	A I G 🗹 🗹	💽 🖻 🖾 🛐 🗊 😭
Entity Type: S - Staf	f 🗾 Entity	CLINICAL, STAFF	<u>a</u>	Locations: All	<u> </u>
Sun 11/16/2014	Mon 11/17/2014	Tue 11/18/2014			21 22 23 24 25 28 29 30 31 nt retrice wember 2014

• Click "Rules of Recurrence"

	ding Group (Administrative Access)
ID:	9900ART Oescription: 9900 ART THERAPY CLASS
Unit :	
SubUnit	TRAINING SUBUNIT
Location:	TRAINING UNIT
Slots:	10
	Comments:
	×
	Save Clear Delete
<u>R</u> ules of Recu	urrence Ca <u>n</u> cel

• Enter a start date that does not overlap with a previous date for that group. Fill in the remaining fields as appropriate and click "Build"

Rules of Recurrenc	e X
Start Time: 4:00	PM Duration 2:00 End Time: 6:00 PM
C Daily Weekly C Monthly	Recur Every 1 week(s) on: Sunday Monday Tuesday Vednesday Thursday Friday Saturday
Start Date: 12/1	0/2014 C End After C End By 7 / C End By
	<u>B</u> uild Clear Ca <u>n</u> cel

• Check a box next to an existing group service event, click "Copy for Paste", "Select All for Paste", and "Paste from Copy". Click "Cancel"

ID: 9900ART Description: 9900 ART THERAPY CLASS Slots:							
Startdate	Day	Starttime	Endtime	Available Select			
11/05/2014	WEDNESDAY	04:00 PM	06:00 PM	□ 8 □			
11/12/2014	WEDNESDAY	04:00 PM	06:00 PM	🕛 🕴 🖵 🗖			
11/19/2014	WEDNESDAY	04:00 PM	06:00 PM	ີ <u>ຊ</u> 1			
11/26/2014	WEDNESDAY	04:00 PM	06:00 PM				
12/03/2014 12/10/2014	WEDNESDAY WEDNESDAY	04:00 PM	06:00 PM				
12/10/2014	WEDNESDAY	04:00 PM 04:00 PM	06:00 PM 06:00 PM				
Unresolved On			Add Group	Edit Group			

Scheduler

CHECK IN/CHECK OUT GROUP

To check in a client in a group:

• Right click on the group service event, and click "Check In"

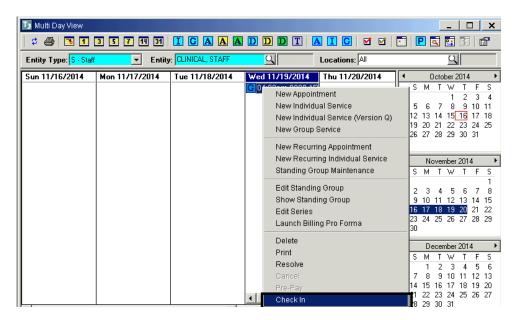
Entity: CLINICAL, STAFF Locations: All Sun 11/16/2014 Mon 11/17/2014 Tue 11/18/2014 Wed 11/19/2014 Thu 11/20/2014 Thu 11/20/2014 Sun 11/16/2014 Mon 11/17/2014 Tue 11/18/2014 Wed 11/19/2014 Thu 11/20/2014 I octobe New Appointment New Appointment S M T New Individual Service 5 6 7 New Individual Service 26 27 28 New Recurring Appointment New Recurring Individual Service November Standing Group 2 3 4 Edit Standing Group 2 3 4 Show Standing Group 9 10 11 Edit Series 16 17 18											
Sun 11/16/2014 Mon 11/17/2014 Tue 11/18/2014 Wed 11/19/2014 Thu 11/20/2014 Concept New Appointment S M T New Appointment S 6 7 New Individual Service S 6 7 New Individual Service (Version Q) 12 13 14 19 20 21 2 26 27 28 2 New Recurring Appointment New Recurring Individual Service New end Standing Group S M T Newend Edit Standing Group S 11 11 Edit Standing Group 9 10 11	🛱 🎒 🖪 1 3 5 7 11 31 I C A A A D D D I A I C 🗹 🗹 🔚 P 🖾 🔄 🖆										
Clip Accession access S M T New Appointment New Individual Service 5 6 7 New Individual Service (Version Q) 12 13 14 1 New Individual Service (Version Q) 12 13 14 1 New Group Service 26 27 28 2 New Recurring Appointment New Recurring Individual Service Novemb Standing Group Maintenance S M T Edit Standing Group 2 3 4 Show Standing Group 9 10 11 11 Edit Series 16 17 18 16 17 18	Entity Type: S - Staff Entity: CLINICAL, STAFF Q Locations: All										
Launch Billing Pro Forma 23 24 25 23 30 Delete Print S M T 1 2 2 2 1 1 2 2 1 1 2 2 1	T F S 2 3 4 9 10 11 16 17 18 23 24 25 30 31 r 7 8 13 14 15 20 21 22 27 28 29 r 7 F 13 14 15 20 21 22 27 28 29 r 7 F 13 14 15 20 21 22 27 28 29 r 7 F 14 5 6 11 12 13 18 19 20										

• Check the box next to the client who has arrived for the service event, and click "Check In"

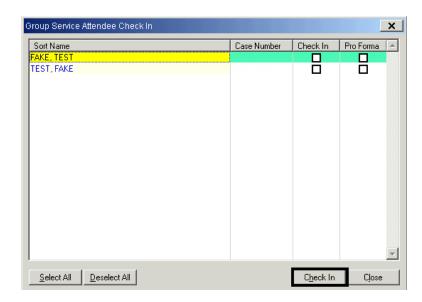
Group Service Attendee Check In			×
Sort Name	Case Number	Cheek-In	Pro Forma 🔺
FAKE, TEST			
TEST, FAKE			
			v
Select All Deselect All		C <u>h</u> eck In	Close

To check out a client in a group:

• Right click on the group service event, and click "Check In"



• Uncheck the box next to the client who has arrived for the service event, and click "Check In"





BILLING PRO FORMA GROUP

• Right click on a group service event and click "Launch Billing Pro Forma"

🌆 Multi Day View					_ D X
🗢 🎒 🖪 🚺	3 5 7 14 31		DDDT] 🗛 I G 🗹 🗹	💽 🖻 🖾 💽 📓 🖀
Entity Type: S · Staff	Entity	CLINICAL, STAFF	<u>Q</u>	Locations: All	<u>a</u>
Sun 11/16/2014	Mon 11/17/2014	Tue 11/18/2014	Nev Nev Nev Sta Edi Shr Edi Lau Del Prit Rev Car Pre	Anaxon W Appointment w Individual Service W Individual Service (Version W Group Service W Recurring Appointment w Recurring Individual Servi nding Group Maintenance t Standing Group t Standing Group t Series unch Billing Pro Forma lete	20 21 22 23 24 25 27 28 29 30 31

• Check the "Pro Forma" box next to the desired client(s) and click "Pro Forma"

Group Service Attendee Billing Pro Forma		×
Sort Name	Case Number	Pro Fee ma 🔺
FAKE, TEST		
		$\mathbf{\nabla}$
		_
1		
Select All Deselect All	<u>P</u> ro Forma	Close

📑 Billing P	ro Fi	orma Dialog									×
Client: SAI:	<u>-</u>	ST, FAKE					Adm	itted	Date: 10/21/2014 Duration 1:00	 06:00 AM 07:00 AM	
SubUnit: Server: Supervisor: Service:		AINING UNIT AINING SUBL NICAL, STAFI HAB-GROUP	F		9901	9900 35	A	Provided At: Contact Type: Outside Facility: ppointment Type:	, Cancelled by Client	B O F	3
Lab: Quantity: Insurance-	-		Fee:	Day	s				: Not Applicable : NOT APPLICABLE ma	 X N	
Pay So			Benefit		Fro	n	•	Determining E Service is not Looking up C Testing Contr	act Pay Source 8999/8999 Billing Information for NON BILLABLE FO t Covered by Benefit Plan 8999. 'lient's Insurance Coverages. ract Pay Source 8998/4010 Billing Information for NON BILLABLE FO		
Authorizatio	P	Procedure	From	Thru	Qty	Used		Service is not Testing Contr Determining E Service is not	Covered by Benefit Plan 4010. (act Pay Source 8998/4105 Billing Information for NON BILLABLE FO t Covered by Benefit Plan 4105. (act Pay Source 8998/4109		•
▲ Coll <u>a</u>	1							·		<u>0</u> K	

• The dialog box appears. Once you are done viewing, click "OK"

NOTE: If you are viewing the Billing Pro Forma for several clients, you will click "OK" for each client

PRINTING INSURANCE COVERAGE REPORT FOR SCHEDULED CLIENTS

The "Scheduler Insurance Coverage Report" shows 3rd Party Coverage for scheduled clients. A template has been created for use.

To Access the Template:

- Click "Scheduler" on the menu bar
- From the drop down menu, click "Scheduler Reports"
- Click "Scheduler Insurance Coverage Report"

File Acc	ess	Scheduler	Client Assignments	Client Fin	ancial Information	Client Reviews	Client Services	ATP	System Tools	Client Profile
Tools W	/indo	Schedule	er Maintenance - Muli	i Day						
0 88		Schedule	er Maintenance - Sing	jle Day						
	_	Schedule	er Setup	•						
	Scheduler Reports		۱.	Schedules Repo	ort					
				Print Appointme	ent Sheets					
			Scheduler Insu	Scheduler Insurance Coverage Report						
				Scheduled Serv	ices Report					

- The "Scheduler Insurance Coverage Report" dialog box appears. Click "Load"
- Click the "Insurance Coverage Client by Alpha" template
- Click "Load"

Selections <u>1</u> Print Columns Sor Clients Locations Servers	All All			<u>a</u>				
Units		Load Template	for Scheduler In	surance Co	verage Repor	t		×
SubUnits	1	Description			Created On	Created By	Last Used	
Service Codes		Insurance Cove	arage Client by Alph	â	05/14/2009	33	09/29/2014	
Event Type		(2)						
Start Dates/Time	10/01/2014							
Thru Date/Time	10/01/2014							
	Exclude Phone Nur							
						0		
		1		×) elete Q <u>E</u> in	id <mark>⊯</mark> ≣o:	ad <mark>x</mark> Ca	a <u>n</u> cel
	(1) ⁻						_	
	K Clear	⊑ ∐⊂juad	<u>Save</u>	tch 🛛 🚑 P	rint XExit			

Selections 1 Tab

- Enter the unit number in the "Locations" field
- Enter the desired date range in the "Dates/Time" fields
- Click "Print" and choose your destination

🖪 Scheduler Insurance Cove	rage Report (Show Access)
Selections <u>1</u> Print Columns So	rt/Subtotal/Title
Clients	
Servers	
Units	
SubUnits	
Service Codes	
Event Type	
Start Dates/Time	10/01/2014
Thru Date/Time	10/31/2014
	Exclude Phone Numbers for Clients not 'Okay to Call at Home'
	∭Clear <mark>⊯</mark> Lo <u>a</u> d <mark>∎</mark> Save ©Batch ∰ Print x Exit

NOTE: The report will sort by client name



PRINTING ONE STAFF PERSON'S SCHEDULE

The "Schedules Report" will print a staff person's schedule for a specific date range. A template has been created to use

To Access the Template:

- Click "Scheduler" on the menu bar
- From the drop down menu, click "Scheduler Reports"
- Click "Schedules Report"

File Access	Scheduler	Client Assignments	Client F	inancial Information	Client Reviews	Client Services
	Schedule	er Maintenance - Multi I er Maintenance - Singl er Setup			_	_
🗾 Client Abstr		er Reports	Þ	Schedules Repo	rt	
🗊 Client Assig 🗊 Client 3rd P				Print Appointmer Scheduler Insura Scheduled Servi	ance Coverage Re	port

- The "Schedules Report" dialog box appears. Click "Load"
- Click the "Individual Staff Schedule" template
- Click "Load"

Locations	-		<u>ع</u>	
Servers			<u> </u>	
Clients	All		<u> </u>	
Other Resources	All	Load Template for Schedules Report	51 1	
Units	All	1000 100 100 100 100 100 100 100 100 10		
SubUnits	Carlos II.	Description	Created On	Created By Last Used
Event Type	All	Individual Staff Schedule SubUnit Schedule by Lead Staff	10/03/2011 10/03/2011	4855 09/29/201 4855 09/29/201
Time Types	All)	4000 00/20/201
Cancellation Reason	All			
Events which are:	• All			
				(3)

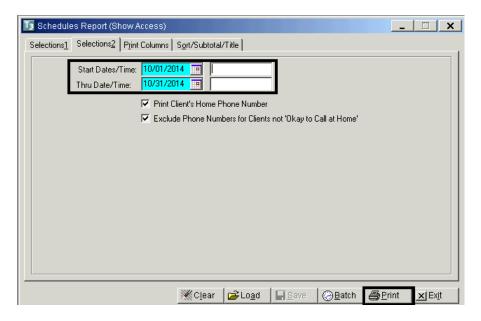
Selections 1 Tab

- Enter the unit number in the "Locations" field
- Enter the staff ID number in the "Servers" field

🖪 Schedules Report (Show A	ccess)		_ 🗆 X
Selections1 Selections2 Print	Columns Sort/Subtotal/Title		
	ENTER YOUR UNIT HERE		<u>a</u>
Clients	All		및
Other Resources	All		<u>q</u>
Units	All		의
SubUnits	All		<u> </u>
Event Type	All		<u> </u>
Time Types	All		<u> </u>
Cancellation Reason			<u>a</u>
Events which are:	€ All C F	Resolved O UnResolved	C Canceled
	💥 C <u>l</u> ear 🛛 🗲 Lu	o <u>a</u> d 📕 <u>B</u> ave 🛛 🛞 <u>B</u> atch	n l ∰ <u>P</u> rint <u>×</u> i Exit

Selections 2 Tab

- Enter the desired date range in the "Dates/Time" fields
- Click "Print" and choose your destination



NOTE: This report includes all scheduled appointments. If the "C" column near the end of the report notes "N" (No), that means that the appointment has <u>not</u> been cancelled. A "Y" (Yes) notes that the appointment has been cancelled

Scheduler

PRINTING STAFF'S SCHEDULES FOR A LOCATION

The "Schedules Report" will print staff(s) schedules for a specific date range. A template has been created to use

To Access the Template:

- Click "Scheduler" on the menu bar
- From the drop down menu, click "Scheduler Reports"
- Click "Schedules Report"

File Access	Scheduler	Client Assignments	Client F	inancial Information	Client Reviews	Client Services
	Schedul	er Maintenance - Multi I	Day			
CLIENT MAIN	Schedule	er Maintenance - Singl	e Day			
	Schedul	er Setup				
🗊 Client Abstr	Schedul	er Reports	۱.	Schedules Repo	rt	
🗾 Client Assig	, Inments Mair	1		Print Appointmer	nt Sheets	
🗊 Client 3rd P				Scheduler Insura Scheduled Servio	ance Coverage Re ces Report	port

- The "Schedules Report" dialog box appears. Click "Load"
- Click the "Sub-Unit Schedule by Lead Staff" template
- Click "Load"

Locations			<u>ع</u>		
Servers			<u>ک</u>		
Clients	1000 C				
Other Resources	All	Load Template for Schedules Report	51.1		
Units			T-0 010	, , ,	
SubUnits	All	Description	Created On		Last Used
Event Type	All	Individual Staff Schedule SubUnit Schedule by Lead Staff	10/03/2011		09/29/2014 09/29/2014
Time Types	All		10/00/2011	4000 (5072072014
Cancellation Reason	All	2)		
Events which are:	• All				
				3	

Selections 1 Tab

• Enter the unit number in the "Locations" field

😼 Schedules Report (Show A	ccess)
Selections <u>1</u> Selections <u>2</u> Print	Columns Sort/Subtotal/Title
Locations	
Servers	
Clients	All 🔍
Other Resources	All Q
Units	All Q
SubUnits	All Q
Event Type	All
Time Types	All
Cancellation Reason	<u> </u>
Events which are:	All C Resolved C UnResolved C Canceled
	∭Clear 🕼 Load 🗐 Bave ເ⊗Batch (⊜Print X) Extt

Selection 2 Tab

- Enter the desired date range in the "Dates/Time" fields
- Click "Print"

15 Schedule	es Report (Show Access)	_ - ×
Selections <u>1</u>	Selections2 Print Columns Sort/Subtotal/Title	
	Start Dates/Time: 10/01/2014 Thru Date/Time: 10/31/2014	
	 Print Client's Home Phone Number Exclude Phone Numbers for Clients not 'Okay to Call at Home' 	
	i Clear i Clead i Bave i Save	rint 🔀 Ex <u>i</u> t

PRINTING APPOINTMENT SHEETS AND CONSUMER ENCOUNTER FORMS

This report prints appointment sheets for appointment events and consumer encounter forms for service events. A template has been created that prints the forms based on the date range selected. The forms will be sorted by staff and will print in order by the date and time of the event

To Access the Template:

- Click "Scheduler" on the menu bar
- From the drop down menu, click "Scheduler Reports"
- Click "Print Appointment Sheets"

File Access	Scheduler	Client Assignments	Client Fina	ancial Information	Client Reviews	Client Services	ATP	System Tools	Client Profile
Tools Windo	Schedule	er Maintenance - Mult	i Day						
	Schedule	er Maintenance - Sing	le Day						
	Schedule	er Setup							
	Schedul	er Reports	•	Schedules Repo	ort				
				Print Appointme	ent Sheets				
				Scheduler Insur	rance Coverage P	Report			
				Scheduled Serv	ices Report				

- The "Print Appointment Sheets" dialog box appears. Click "Load"
- Click the "Appointment Sheets by Staff and Date" template
- Click "Load"

Locations	Particular in the second se		<u> </u>			
Servers	-		<u> </u>	Ū.		
Clients	All		<u> </u>			
Other Resources	All	Load Template for Print		ts		
Units		Print				
SubUnits	and the second se	Description Appointment Sheets by St	off and Date	Created On 11/07/2011	Created By	09/29/2014
Event Type	No. of Concession, Name	Appointment sheets by si		11/0//2011	4000	03/23/201
Time Types	All	2)			
Events which are:	 All 					
Start Dates/Time:	10/01/2014					
Thru Date/Time:	10/01/2014				-	
Start Dates/Time:	10/01/2014					

Selection 1 Tab

- Enter the unit number in the "Locations" field
- Enter the desired date range in the "Dates/Time" fields
- Click "Print"

📧 Print Appointment Sheets (Show Access)
Selections1 Sort/Subtotal/Title	1
	ENTER YOUR UNIT HERE 1
Servers	All
Clients	All Q
Other Resources	
Units	
SubUnits	
Event Type	All
Time Types	All
Events which are:	All C Resolved C UnResolved
Start Dates/Time:	10/01/2014
Thru Date/Time:	10/01/2014
	∭ Clear 🗳 Load 🗐 Save ⊗ Batch 🚭 Print 🗙 Exit

Scheduler

PRINTING SCHEDULED SERVICES REPORT

The "Scheduled Services Report" prints service events only and can be used to compare scheduled services with those that were actually provided. A template has been created for use

To Access the Template:

- Click "Scheduler" on the menu bar
- From the drop down menu, click "Scheduler Reports"
- Click "Scheduler Services Report"



- The "Scheduled Services Report" dialog box appears. Select "Load"
- Click the "Scheduled Services by Unit, Sub-Unit, Server and Date" template
- Click "Load"

Locations				<u> </u>			
Servers				<u>q</u>			
Billing Supervisors	All			<u>q</u> [
Credentials	All						
Credential Groups	All	Load Temp	late for Schedule	d Services Rep	port		
Primary Servers	All	Description			Created On	Created By	Last Used
Clients	All	Scheduled	Services by Unit Su	bUnit Server and	1 05/14/2009	33	09/29/2014
Units	All		(2)			1
SubUnits	All		\sim				
Program Category Headings	All						
Program Categories	All						
Unit Types	All	G				2	1
Administrative Groups	All					6	

Selection 1 Tab

• Enter the unit number in the "Locations" field

Scheduled Services Report	t (Show Access)	_ 🗆 X
Selections <u>1</u> Selections <u>2</u> Selections	tions <u>3</u> Selections <u>4</u> P <u>r</u> int Columns Sort/Subtotal/Title	
Servers		
Billing Supervisors	All 🔍 🗌	
Credentials	All 🔍 🗌	
Credential Groups	All 🔍 🗌	
Primary Servers	All 🔍 🗌	
Clients	All 🔍	
Units	All 🔍	
SubUnits	All 🔍	
Program Category Headings	All Q	
Program Categories	All Q	
Unit Types	All Q	
Administrative Groups		
	涨 Clear 🗲 Load 🗐 Save 🛞 Batch 🎒	Print X Ex <u>i</u> t

Selection 3 Tab

- Enter desired date range in the "Date/Time" fields
- Click "Print"

Scheduled Services Report ()	Show Access)			_ 🗆 ×					
Selections <u>1</u> Selections <u>2</u> Selection	Selections1 Selections2 Selections3 Selections4 Print Columns Sort/Subtotal/Title								
Data Entered By A	I		<u>्</u> य						
Cancellation Reason Services which are	• All	C Resolved	O UnResolved	C Canceled					
Check In Status	• All	C Checked In	C Not Checked						
Services where Transportation is	• All	C Required	C Not Required						
Service Date/Time Thru Date/Time	10/01/2014 ·		7						
Entered Date/Time Thru Entered Date/Time	77 III 77 III		-						
	Exclude Phone	Numbers for Clients not 'O	kay to Call at Home'						
P	💥 C <u>l</u> ear	Lo <u>a</u> d 🔄 Sav	e 🕝 <u>B</u> atch 🕻	∰ <u>Print </u> Exit					

Scheduler

Support Desk Contact Information sdhelpdesk@optum.com 1-800-834-3792

Monday through Friday (E-mail)

Hours	Services	
6:00 am to 6:00 pm	All services except password resets or any service involving PHI	
Monday through Friday (Telephone)		
Hours	Services	
4:30 am to 6:00 am	Resetting passwords (24 hour programs) and reporting system outages*	
6:00 am to 6:00 pm	All services	
6:00 pm to 11:00 pm	Resetting passwords (24 hour programs) and reporting system outages*	
11:00 pm to 4:30 am	Reporting system outages*	
Weekends (Telephone)		
Hours	Services	
4:30 am to 11:00 pm	Resetting passwords (24 hour programs) and reporting system outages*	
11:00 pm to 4:30 am	Reporting system outages*	

* By definition, a system outage affects multiple users. Examples include when:

-The system does not respond and appears to be frozen

-No data can be entered or viewed

Support Desk Suggestions

- Please consult with your program manager and your resource packet prior to contacting the Support Desk.
- When calling for a password reset on weekdays between 4:30-6a or 6-11p, or calling weekends between 4:30a-11p, you must leave a message. Include your name, CCBH staff ID, phone number and the reason for your call.
- You may be given a ticket/tracking number if you call between 6:00a and 6:00p Monday through Friday. Remember to keep this number for future reference.

Additional Contacts

Questions	Where To Go
Clinical Documentation Questions	Documentation Manual/Your Program Manager
Duplicate Clients and Name/DOB/Gender/SSN Changes	Complete Form BHS-025 and Call Medical Records: 619-692-5700 x 3
Financial Questions (UMDAP/Insurance)	Billing Unit: 619-338-2612 Fax- 858-467-9682
Online User Manuals and Forms	www.optumsandiego.com
Service Codes	CCBH (Anasazi) User Manual/QM Unit