

# **MENTAL HEALTH MIS SCHEDULER**



**LIVE WELL**  
SAN DIEGO

**County of San Diego  
Behavioral Health Services**

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## **CONFIDENTIALITY**

**HIPAA regulations mandate that all 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 not 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.

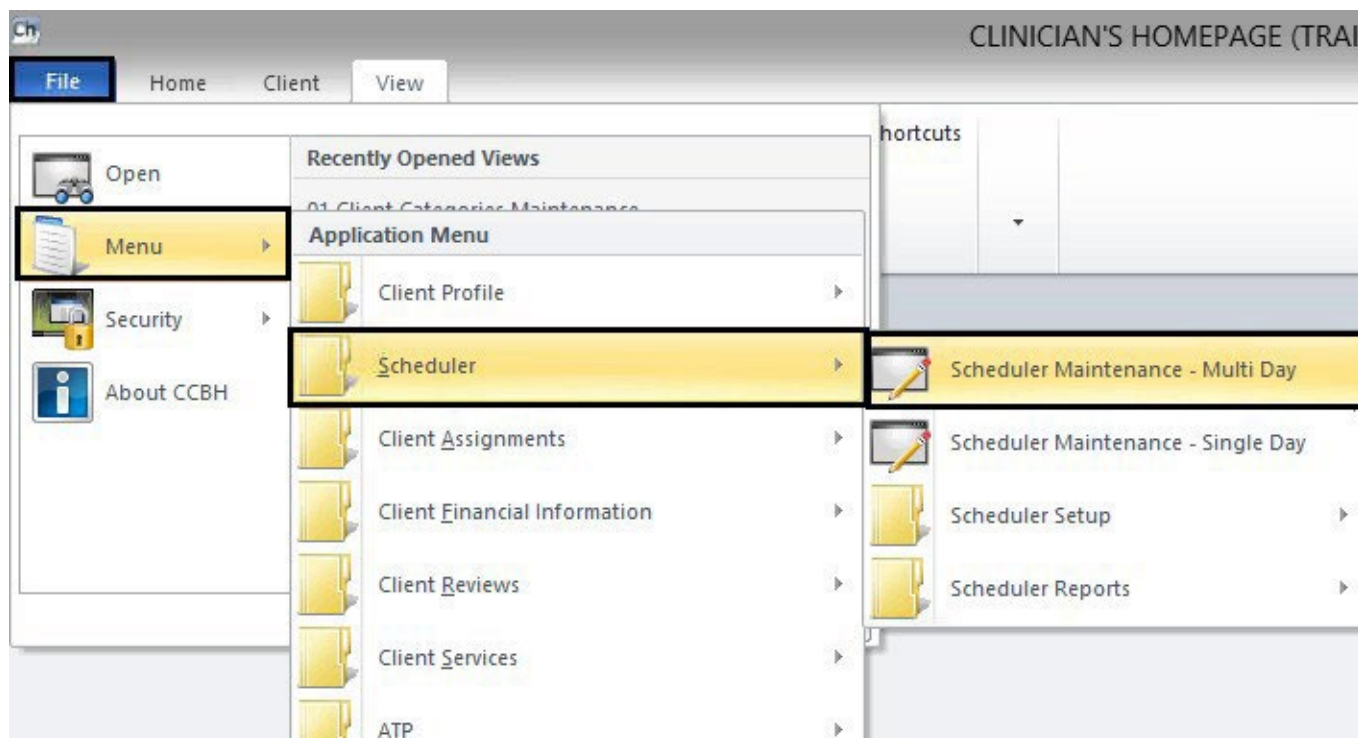
Do not leave your computer unlocked with client data on the screen for others to access or view while you are away from your desk. Lock your CCBH session before leaving your computer.

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).

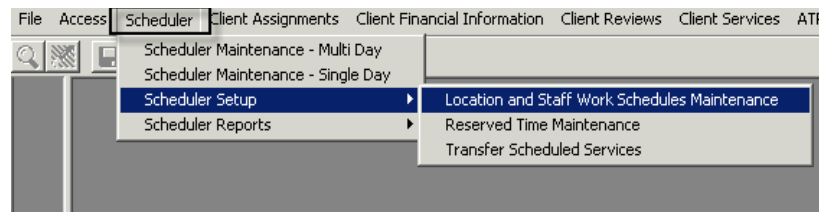


## LOCATION AND STAFF WORK SCHEDULES MAINTENANCE

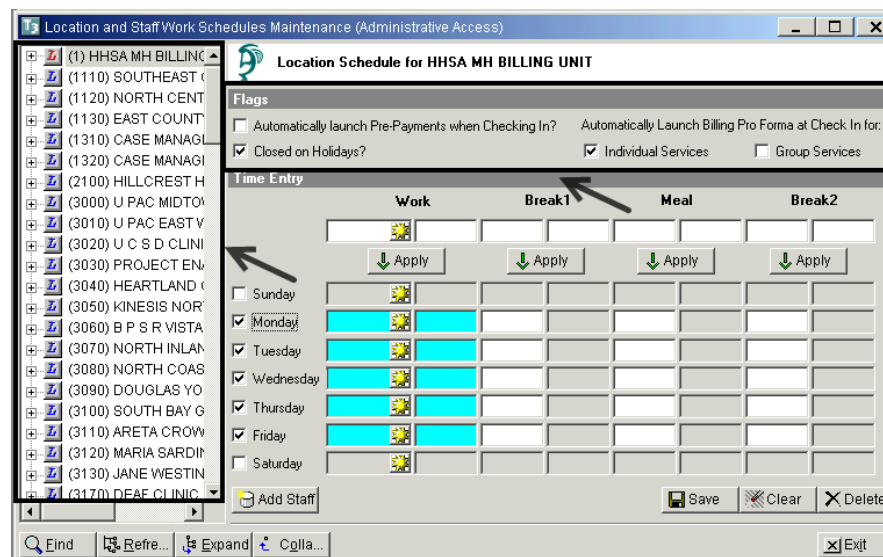
Program Managers and/or Administrative Staff will be responsible for maintaining the “Location and Staff Work Schedules Maintenance” for their own program(s).

To access:

- Click on “Scheduler”
- Click on “Scheduler Setup”
- Click on “Location and Staff Work Schedules Maintenance”



- 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, 4<sup>th</sup> of July, Labor Day, Thanksgiving, and Christmas. Do not check off any other boxes



## 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)

Location Schedule for HHSA MH BILLING UNIT

Flags

☐ Automatically launch Pre-Payments when Checking In? ☐ Automatically Launch Billing Pro Forma at Check In for:

☒ Closed on Holidays? ☒ Individual Services ☐ Group Services

Time Entry

	Work	Break1	Meal	Break2
	08:00 AM 05:00 PM			
	Apply	Apply	Apply	Apply
<input type="checkbox"/> Sunday				
<input checked="" type="checkbox"/> Monday	08:00 AM 05:00 PM			
<input checked="" type="checkbox"/> Tuesday	08:00 AM 05:00 PM			
<input checked="" type="checkbox"/> Wednesday	08:00 AM 05:00 PM			
<input checked="" type="checkbox"/> Thursday	08:00 AM 05:00 PM			
<input checked="" type="checkbox"/> Friday	08:00 AM 05:00 PM			
<input type="checkbox"/> Saturday				

Add Staff Save Clear Delete

Find Refre... Expand Colla... Exit

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"

Location and Staff Work Schedules Maintenance (Administrative Access)

Location Schedule for HHSA MH BILLING UNIT

Flags

☐ Automatically launch Pre-Payments when Checking In? ☐ Automatically Launch Billing Pro Forma at Check In for:

☒ Closed on Holidays? ☒ Individual Services ☐ Group Services

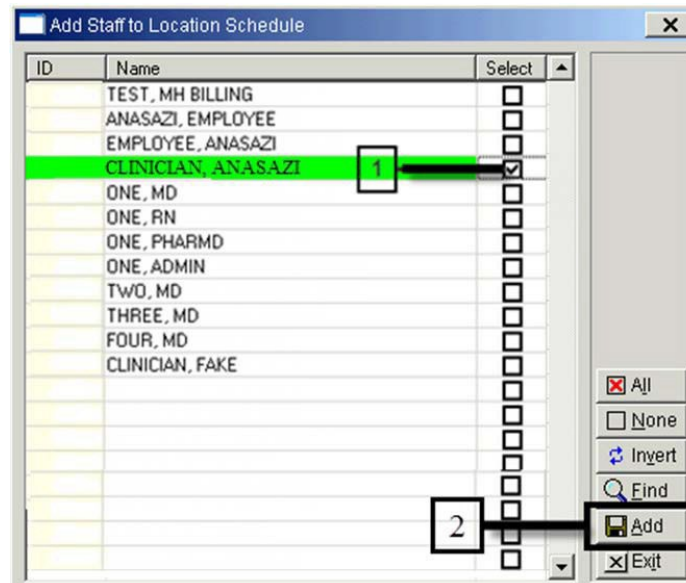
Time Entry

	Work	Break1	Meal	Break2
	08:00 AM 05:00 PM			
	Apply	Apply	Apply	Apply
<input type="checkbox"/> Sunday				
<input checked="" type="checkbox"/> Monday	08:00 AM 05:00 PM			
<input checked="" type="checkbox"/> Tuesday	08:00 AM 05:00 PM			
<input checked="" type="checkbox"/> Wednesday	08:00 AM 05:00 PM			
<input checked="" type="checkbox"/> Thursday	08:00 AM 05:00 PM			
<input checked="" type="checkbox"/> Friday	08:00 AM 05:00 PM			
<input type="checkbox"/> Saturday				

Add Staff Save Clear Delete

Find Refre... Expand Colla... Exit

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





## 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 "**Time Entry**" was explained in the Location and Staff Work Schedules Maintenance section. *NOTE: Be sure to "Save" when finished*

Location and Staff Work Schedules Maintenance (Administrative Access)

Staff Schedule for CLINICAL, STAFF

Flags

Schedule Type: L - Same as Location

Time Entry

W - Weekly

Break1

Meal

Break2

Apply

Apply

Apply

Apply

Sunday

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

07:00 AM

06:00 PM

07:00 AM

06:00 PM

07:00 AM

06:00 PM

07:00 AM

06:00 PM

07:00 AM

06:00 PM

Save

Clear

Delete

Find

Refre...

Expand

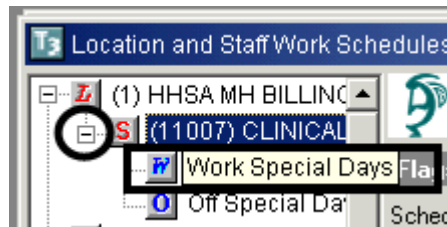
Colla...

Exit

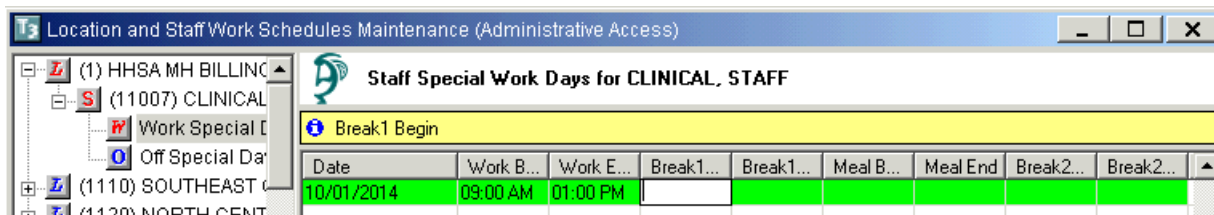
## WORK SPECIAL DAYS

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”



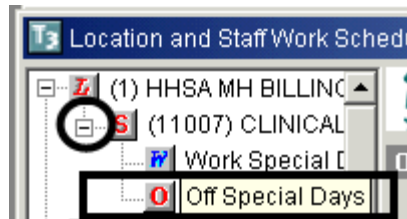
- Click in the “Date” cell to enter the date. Use the tab key on the keyboard to move from cell to cell and enter the “Work Begin” and “Work End” times, as well as the meal and break times (if applicable)
- All information is saved once you successfully tab to the next row



## 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”

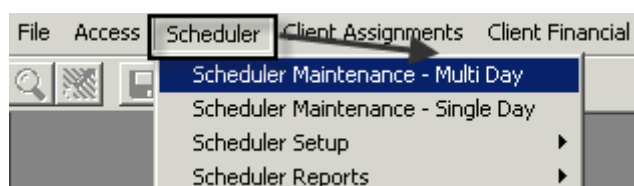
From	Thru	Description
09/22/2014	09/25/2014	VACATION
/ /	/ /	
/ /	/ /	
/ /	/ /	
/ /	/ /	

## 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.

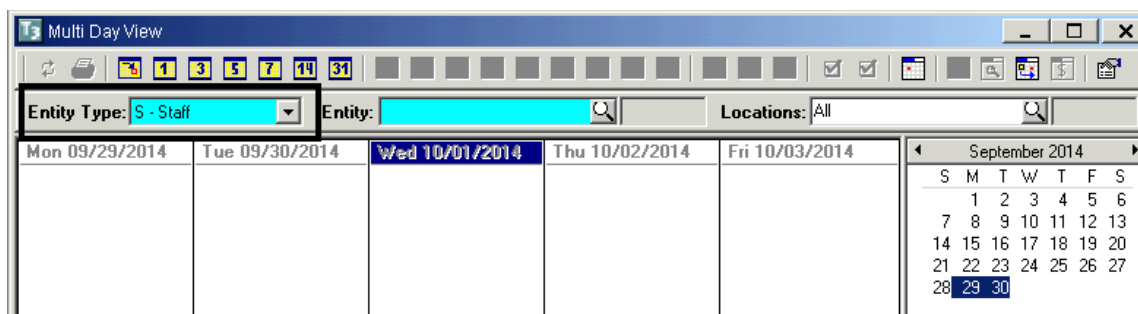
To access:

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



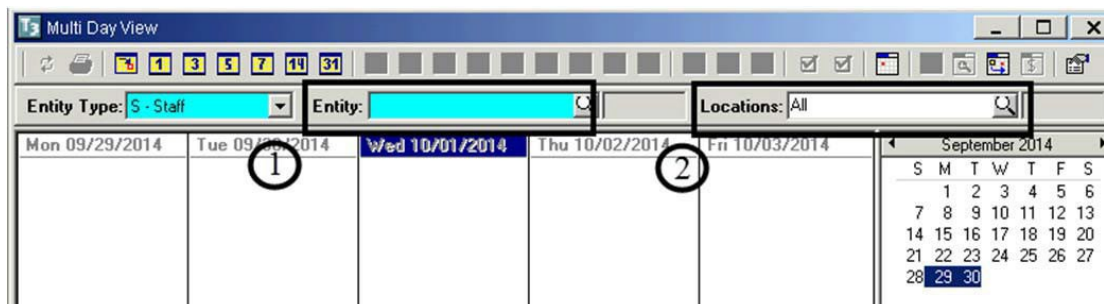
The Multi-Day screen displays.

- "Entity Type" will default to Staff



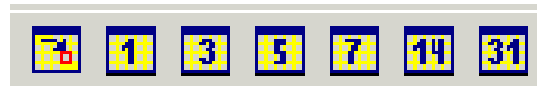
### To view a schedule

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"

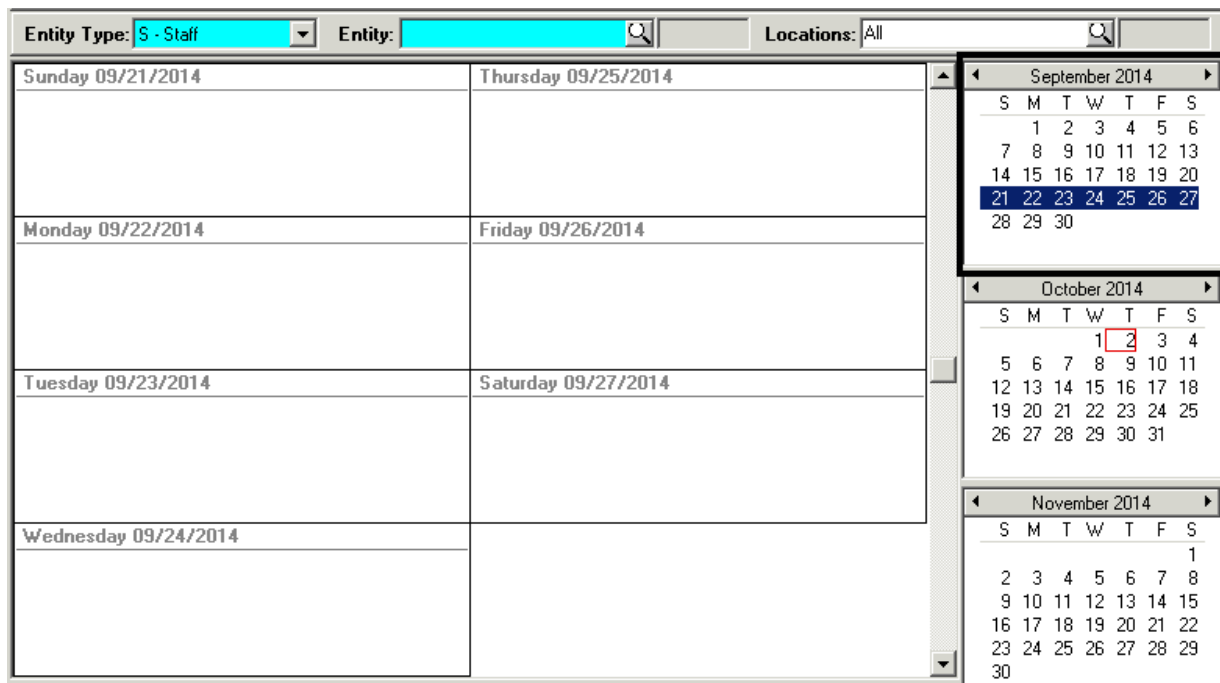


## Adjusting the Calendar

- 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

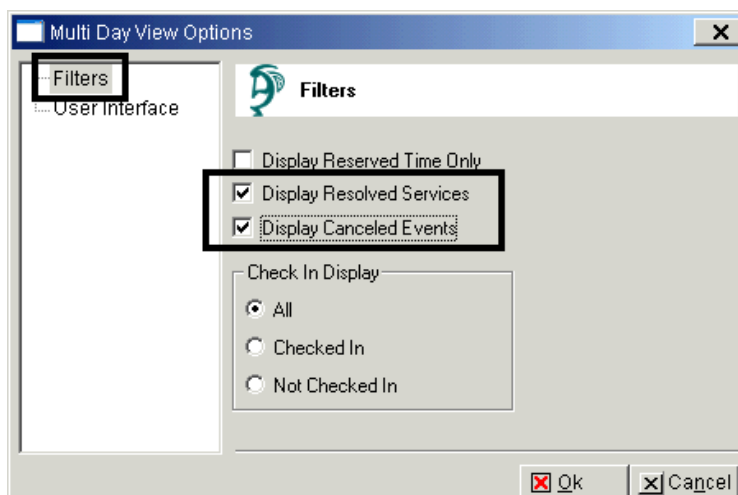


## VIEW OPTIONS

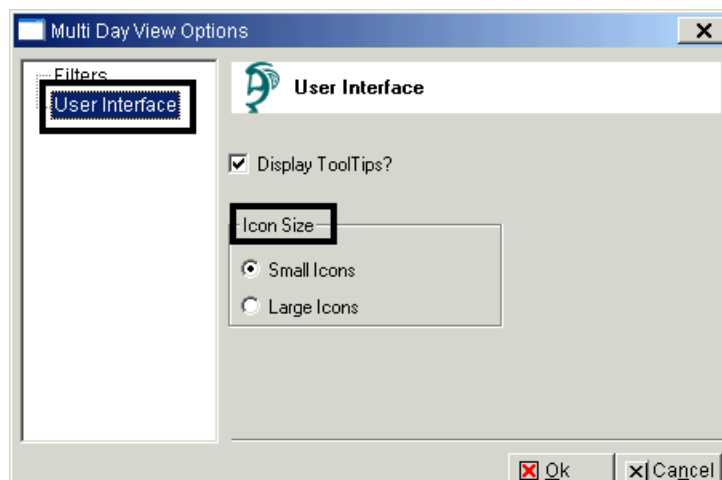
- Click on the below icon to access the “View Options”



- 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



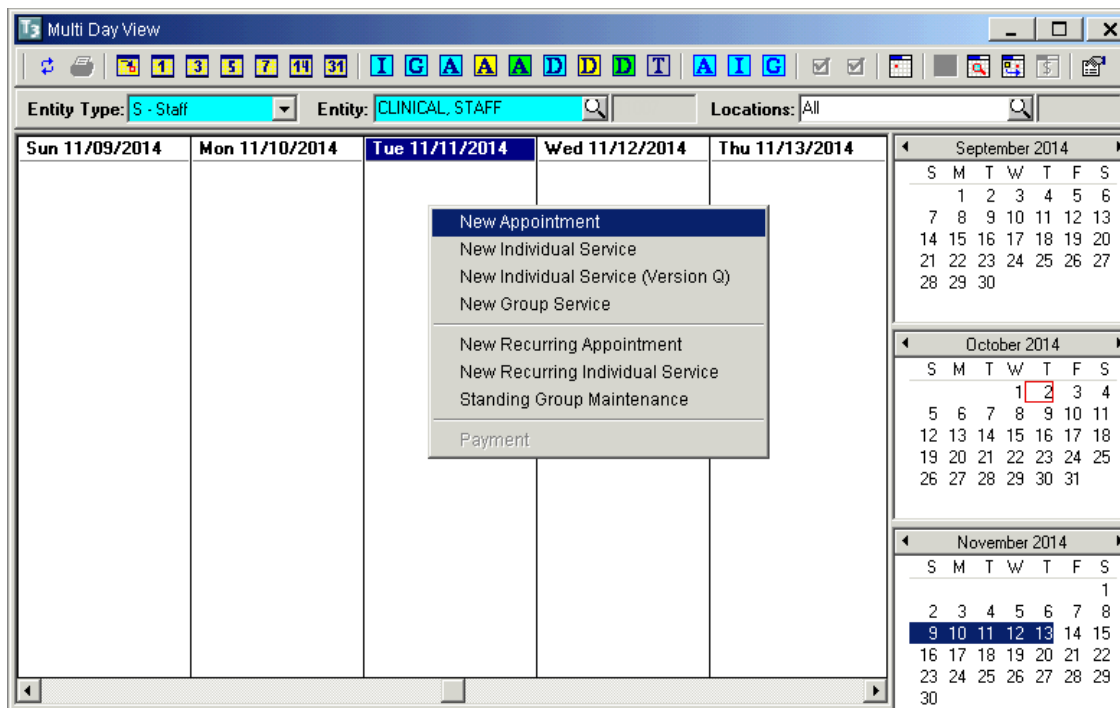
- Under “User Interface”, choose your preferred icon size. Small icons are used throughout the screenshots in this resource packet
- Click “OK”



## NEW APPOINTMENT EVENT

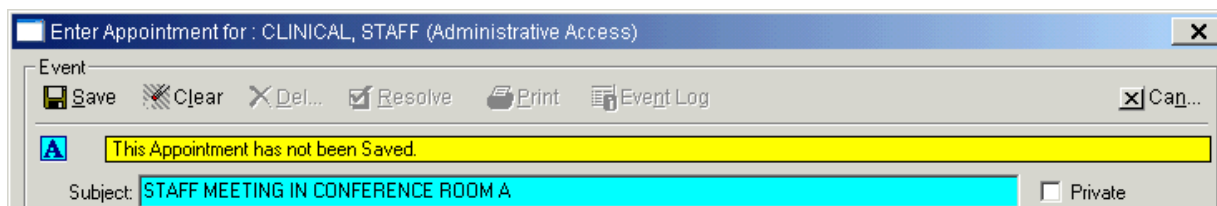
Appointments are events which do not involve a client.

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



- 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>
	A - All Day
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”

Time Type:	- <Undefined>
	- <Undefined>
	B - Busy
	F - Free
	T - Tentative

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 : CLINICAL, STAFF (Administrative Access)

Event: **Save** Clear Del... Resolve Print Event Log Can...

**This Appointment has not been Saved.**

Subject: STAFF MEETING IN CONFERENCE 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 SUBUNIT 9901

Location: HHSA MH BILLING UNIT 1



- 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 Clear Del... Resolve Print Event Log Can...

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 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 SUBUNIT 9901

Location: HHSA MH BILLING UNIT 1

Comments

Attendees: Add Edit Del...

Type	Name	Start Date	End Date	Start Time	End Time
S	CLINICAL, STAFF	11/11/2014	11/11/2014	01:00 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

Add Attendees

Entity Type: S - Staff

Staff: TEST STAFF

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

Save Clear Cancel

- After adding all attendees, click “Cancel”

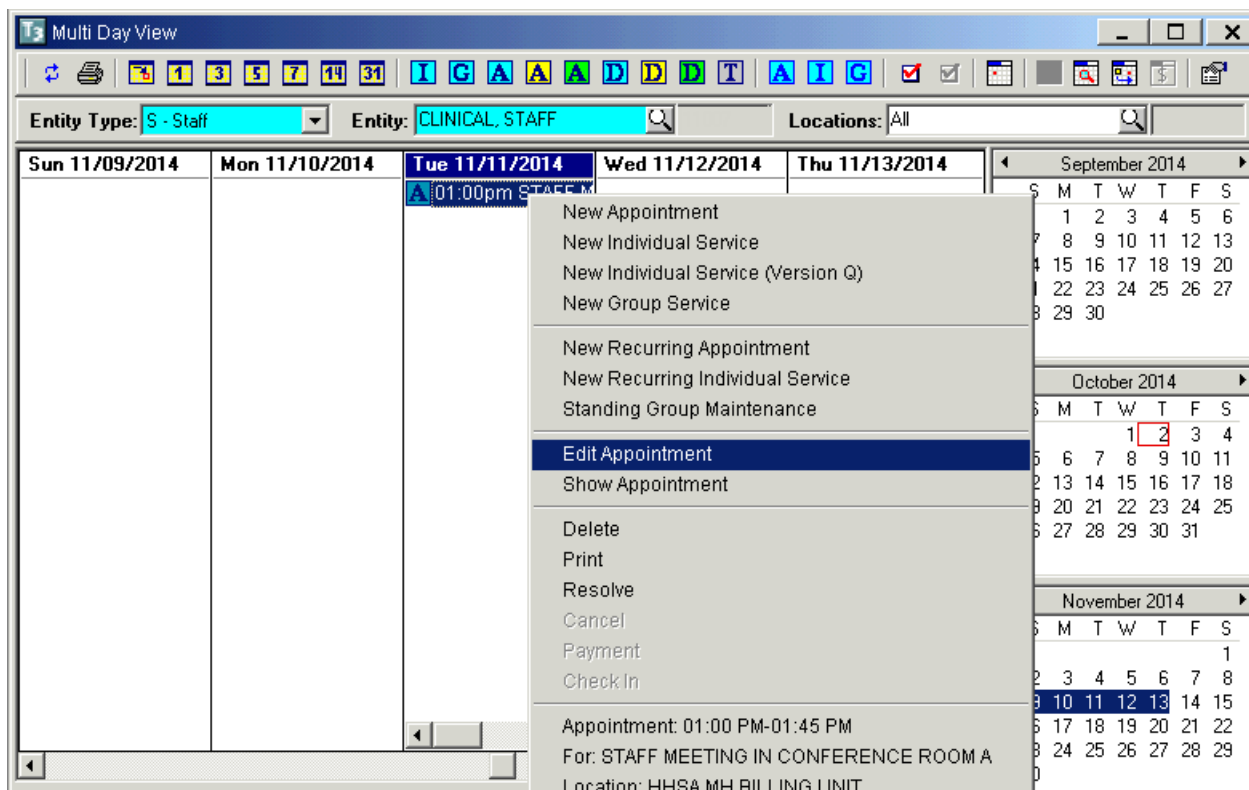
Enter Appointment for : CLINICAL, STAFF (Administrative Access)

Event: Save Clear Del... Resolve Print Event Log Can...

This Normal Appointment will Occur in the Future.

## EDITING AN APPOINTMENT EVENT

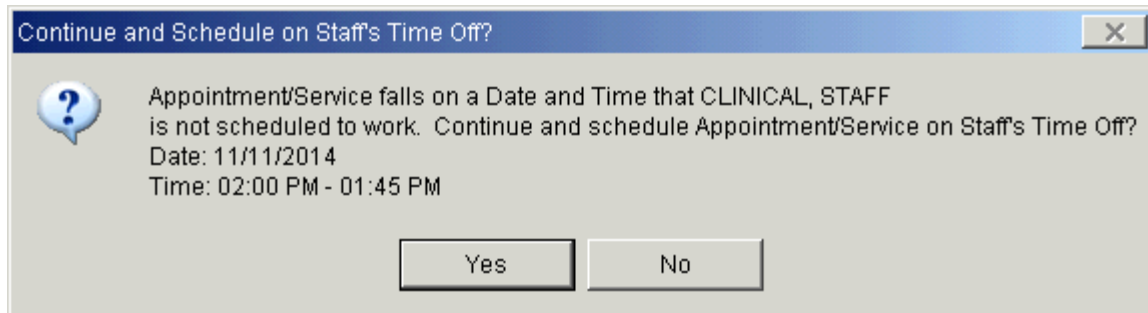
- Right click on the appointment event to be edited and click “Edit Appointment”



- 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”



- 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



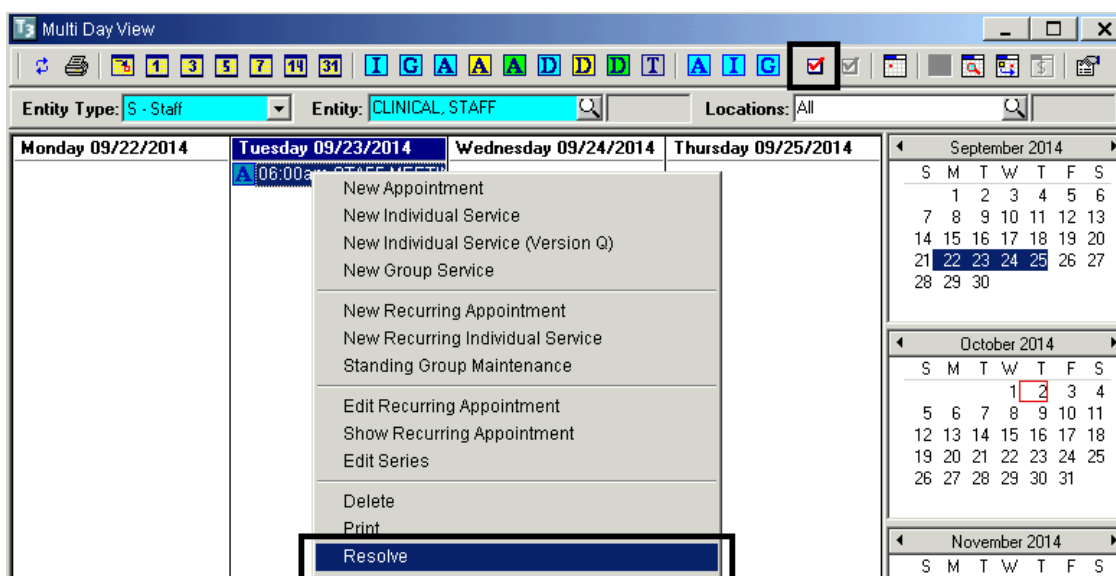
*NOTE: A scheduled non-recurring Appointment Event cannot be edited to become a recurring Appointment Event*

## RESOLVE/UNRESOLVE APPOINTMENT EVENT

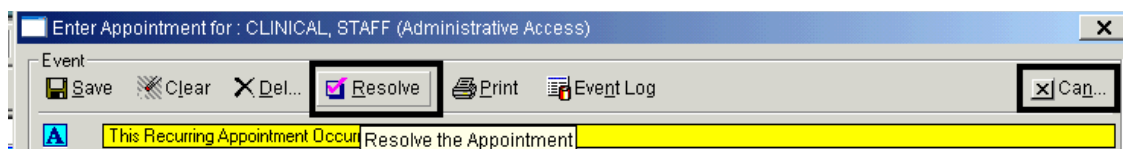
When an event is resolved, that indicates that the event took place. Events on future dates cannot be resolved. It is a program decision as to whether or not they resolve appointment events.

There are two ways to resolve an appointment:

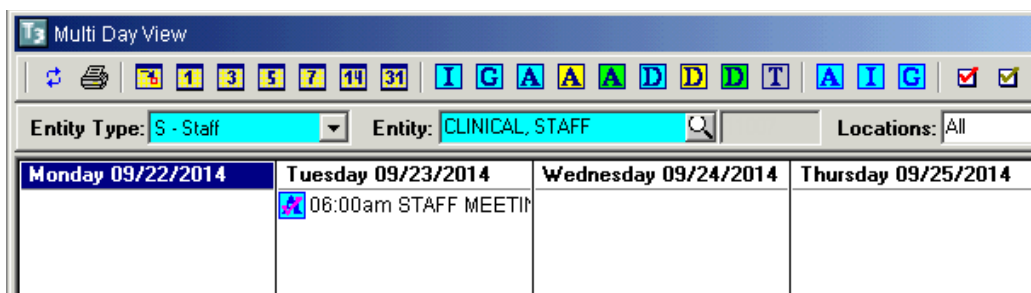
- Single click on the desired appointment on the calendar so that it is highlighted, and click the red check icon –or–
- Right click on the desired appointment on the calendar so that the drop down menu appears, and click “Resolve”



- The Appointment window opens. Click “Resolve”, and then click “Cancel”



- The event displays on the calendar with a pink check

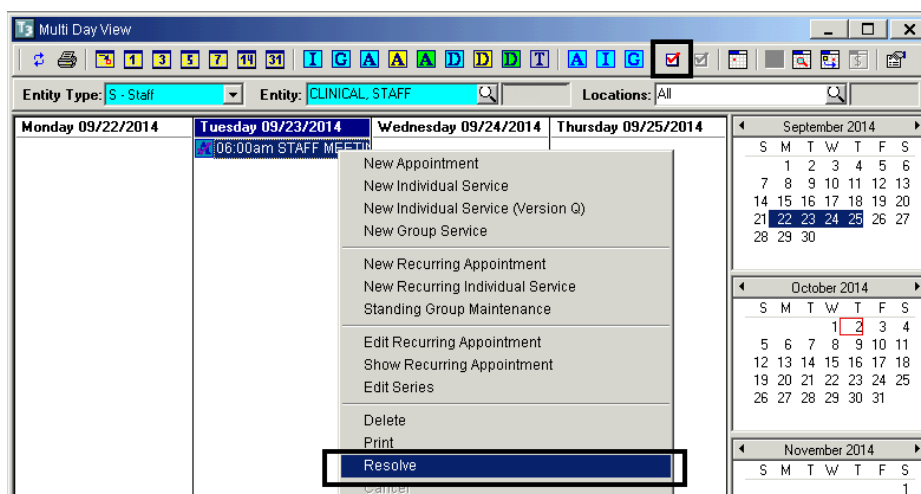


- *NOTE: If the event does not display on the calendar, check the “View Options” to ensure the “Display Resolved Services” box is checked*

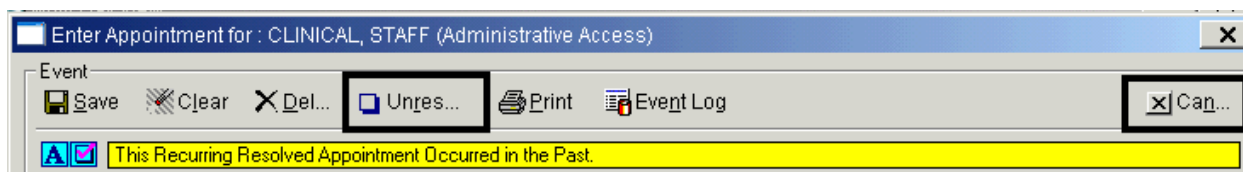
The only reason you would unresolve, is if you resolved by mistake.

There are two ways to unresolve an appointment:

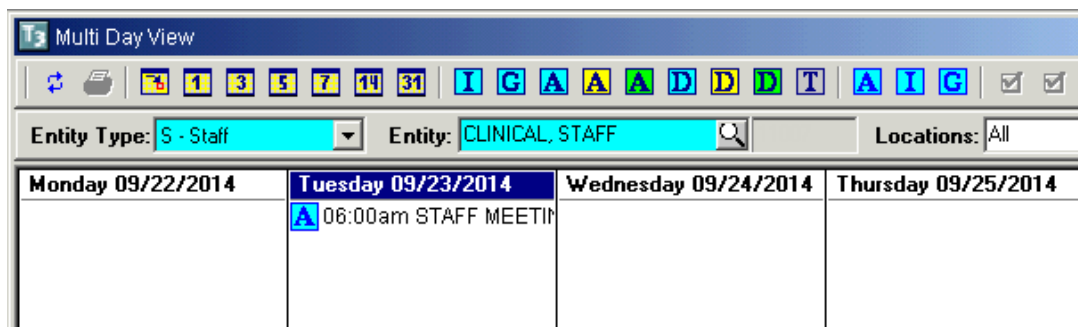
- Single click on the desired appointment on the calendar so that it is highlighted, and click the red check icon
- Right click on the desired appointment on the calendar so that the drop down menu appears, and click “Resolve”



- The appointment window opens. Click “Unresolve”, and then click “Cancel”



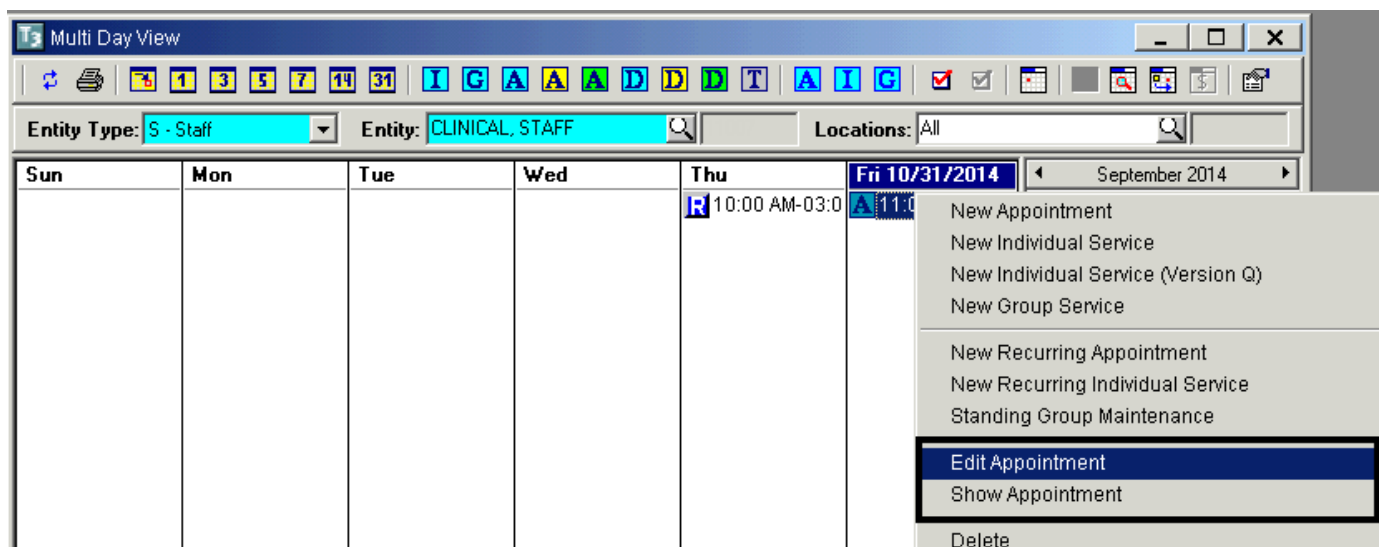
- The event displays on the calendar without a pink check



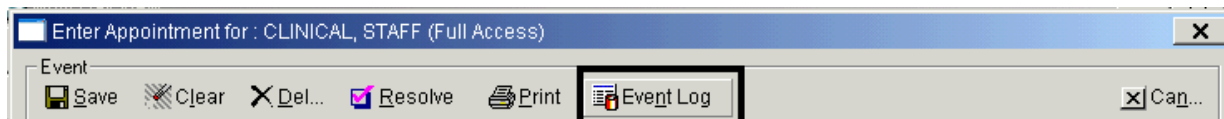
## APPOINTMENT EVENT LOG

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.

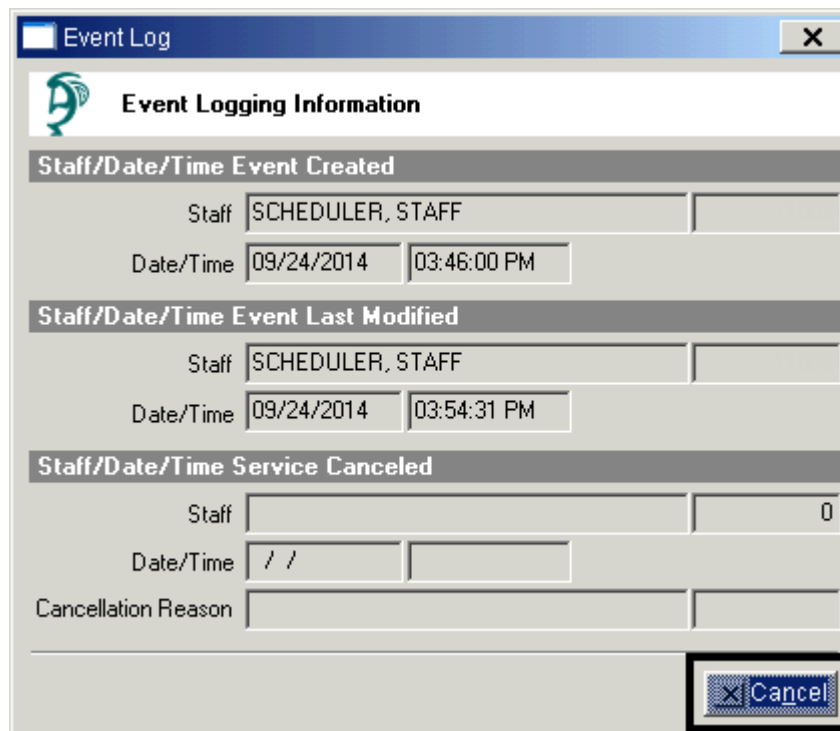
- Open the appointment window either by double clicking on the appointment, or by right clicking and choosing “Edit Appointment” or “Show Appointment” from the drop down menu



- Click “Event Log”



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



The 'Event Log' dialog box displays event logging information. It features a title bar with a close button (X). The main content area is titled 'Event Logging Information' and contains three sections: 'Staff/Date/Time Event Created', 'Staff/Date/Time Event Last Modified', and 'Staff/Date/Time Service Canceled'. Each section has input fields for Staff, Date/Time, and a Cancellation Reason field. The 'Event Created' and 'Event Last Modified' sections show data for 'SCHEDULER, STAFF' on '09/24/2014' at '03:46:00 PM' and '03:54:31 PM' respectively. The 'Service Canceled' section shows a staff member, a date of '09/24/2014', and a time of '03:54:31 PM'. A 'Cancel' button is located at the bottom right of the dialog box.

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		

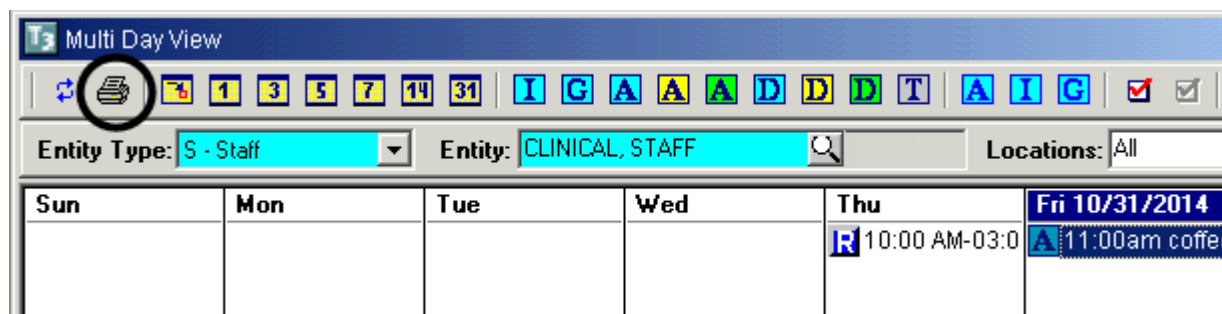
- Click "CANCEL"
- Click "Cancel" to return to the calendar



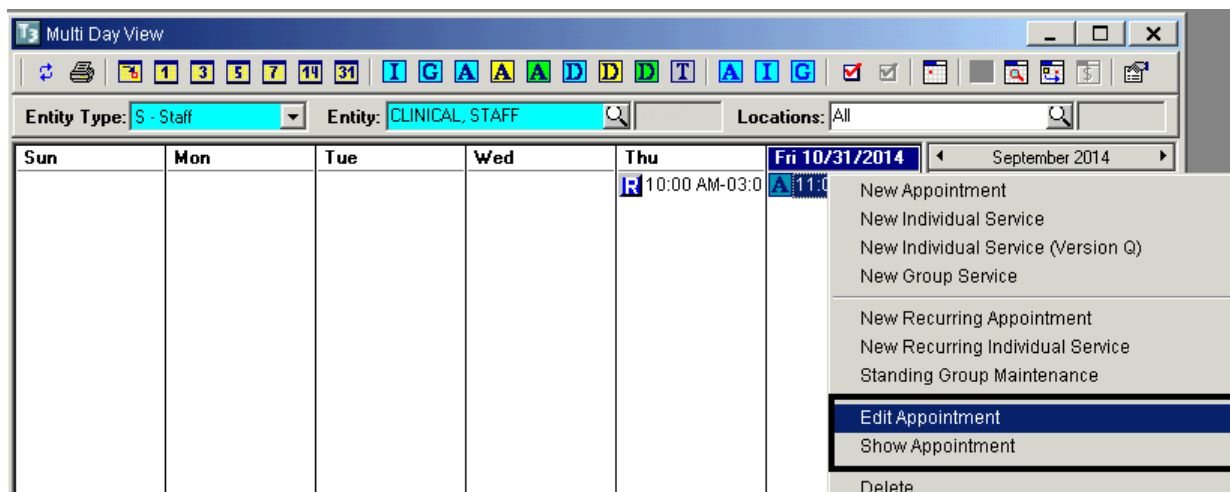
The 'Enter Appointment for : CLINICAL, STAFF (Full Access)' dialog box features a title bar with a close button (X). Below the title bar is a toolbar with buttons for 'Save', 'Clear', 'Del...', 'Resolve', 'Print', and 'Event Log'. A 'Cancel' button is located at the bottom right of the dialog box.

## 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.



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



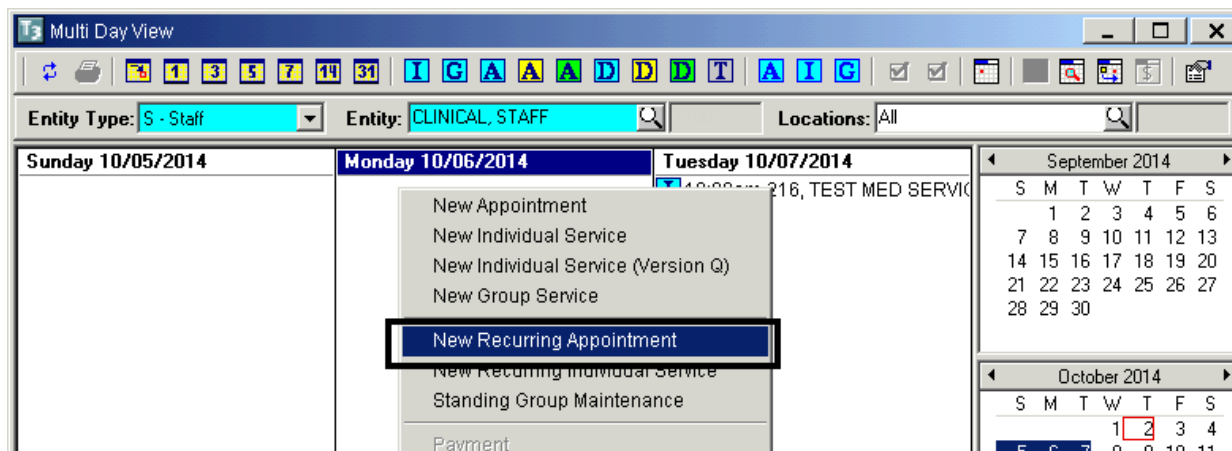
- The “Enter Appointment for [Staff Person’s Name]” window appears. Click “Print”





## RECURRING APPOINTMENT EVENT

- Right click in the column of the day to be scheduled, and click “New Recurring Appointment” from the drop down menu



- 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”

The 'Rules of Recurrence' dialog box is shown. It contains the following fields and options:

- Start Time: 6:00 PM
- Duration: 1:00
- End Time: 7:00 PM
- Recurrence type: ☒ Weekly
- Recur Every: 1 week(s) on:
- Days: ☐ Sunday, ☒ Monday, ☐ Tuesday, ☐ Wednesday, ☐ Thursday, ☐ Friday, ☐ Saturday
- Start Date: 10/06/2014
- End After: ☒ 5 Occurrences
- End By: ☐ / /
- Buttons: Build (highlighted), Clear, Cancel

- The “Enter Appointment for [Staff Person’s Name]” screen appears. Complete prompts by entering the appropriate information

Enter Appointment for : CLINICAL, STAFF (Administrative Access)

Event

Save Clear Del... Resolve Print Event Log Can...

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

- Enter the “Unit”, “SubUnit”, and “Location”.
- Click “Save”

Enter Appointment for : CLINICAL, STAFF (Administrative Access)

Event

Save Clear Del... Resolve Print Event Log Can...

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 SUBUNIT 9901

Location: HHSA MH BILLING UNIT 1

Comments

Attendees

Add Edit Del...

- The “Attendees” box is then activated. If desired, click “Add” to enter additional staff

Attendees

Add Edit Del...

Type	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”

The 'Add Attendees' dialog box contains the following fields and controls:

- Entity Type:** A dropdown menu showing 'S - Staff'.
- Staff:** A text input field containing 'TEST, STAFF' with a search icon to its right.
- Event Type:** A dropdown menu showing 'N - Normal'.
- Start Date:** A date picker showing '10/06/2014'.
- Start Time:** A time picker showing '06:00 PM'.
- Duration:** A time input field showing '1:00'.
- End Date:** A date picker showing '10/06/2014'.
- End Time:** A time picker showing '07:00 PM'.
- Time Type:** A dropdown menu showing 'B - Busy'.
- Buttons:** 'Save' (highlighted with a black box), 'Clear', and 'Cancel'.

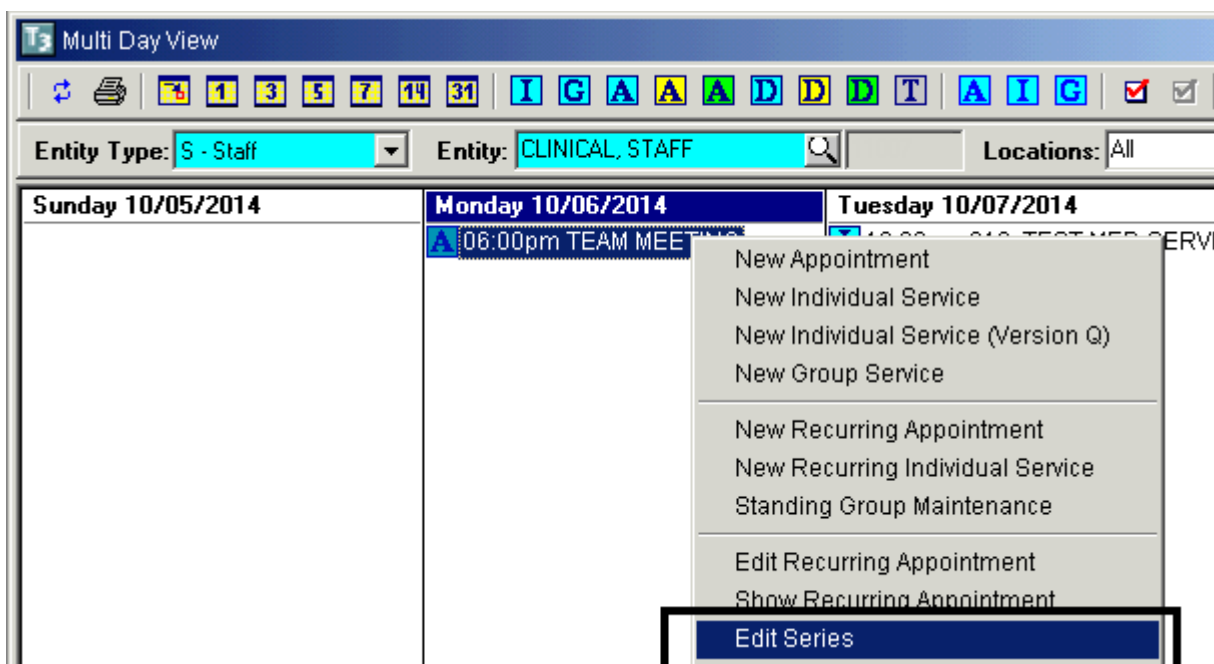
- Once finished, click “Cancel”

The 'Enter Appointment for : CLINICAL, STAFF (Administrative Access)' dialog box contains the following elements:

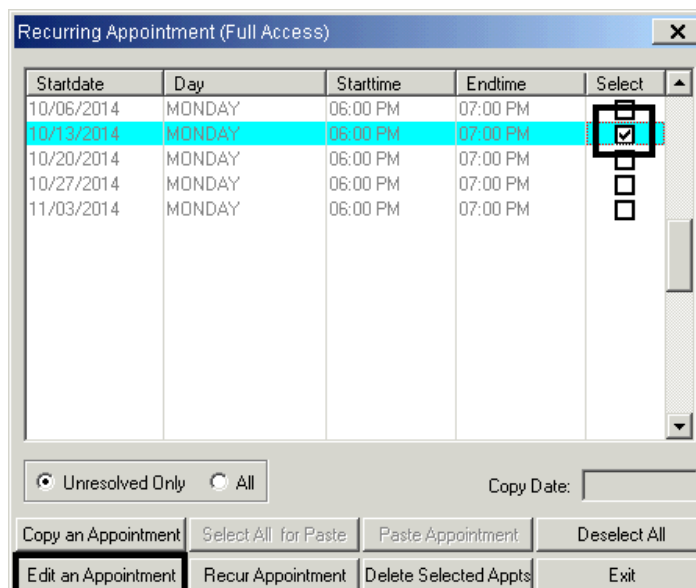
- Event Section:** A row of buttons: 'Save', 'Clear', 'Del...', 'Resolve', 'Print', and 'Event Log'.
- Buttons:** 'Cancel' (highlighted with a black box).
- Message Bar:** A yellow bar at the bottom with the text 'This Recurring Appointment will Occur in the Future.'

## 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”

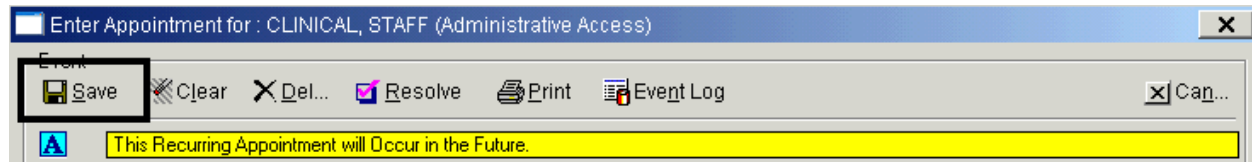


- Check the box next to any appointment in the series, and click “Edit an Appointment”

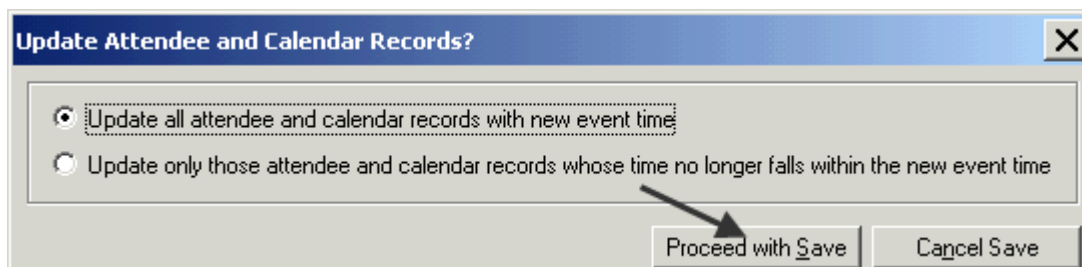


- Make the necessary change(s) and “Save”

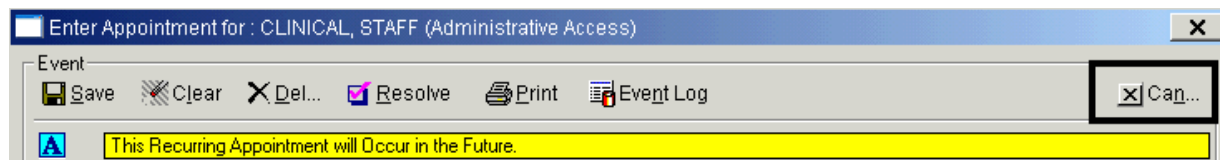
*NOTE: In this example, the time is being changed from 6:00-7:00 to 5:00-6:00*



- “Proceed with Save” when you are asked to “Update all attendee and calendar records with new event time”



- Click “Cancel”



- 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”
  - “Paste Appointment”

Startdate	Day	Starttime	Endtime	Select
10/06/2014	MONDAY	06:00 PM	07:00 PM	<input checked="" type="checkbox"/>
10/13/2014	MONDAY	06:00 PM	07:00 PM	<input type="checkbox"/>
10/20/2014	MONDAY	06:00 PM	07:00 PM	<input type="checkbox"/>
10/27/2014	MONDAY	06:00 PM	07:00 PM	<input type="checkbox"/>
11/03/2014	MONDAY	06:00 PM	07:00 PM	<input type="checkbox"/>

☒ Unresolved Only   ☐ All   Copy Date:

Copy an Appointment   Select All for Paste   Paste Appointment   Deselect All

Edit an Appointment   Recur Appointment   Delete Selected Appts   Exit

Startdate	Day	Starttime	Endtime	Select
10/06/2014	MONDAY	06:00 PM	07:00 PM	<input checked="" type="checkbox"/>
10/13/2014	MONDAY	06:00 PM	07:00 PM	<input type="checkbox"/>
10/20/2014	MONDAY	06:00 PM	07:00 PM	<input type="checkbox"/>
10/27/2014	MONDAY	06:00 PM	07:00 PM	<input type="checkbox"/>
11/03/2014	MONDAY	06:00 PM	07:00 PM	<input type="checkbox"/>

☒ Unresolved Only   ☐ All   Copy Date: 10/13/2014

Copy an Appointment   Select All for Paste   Paste Appointment   Deselect All

Edit an Appointment   Recur Appointment   Delete Selected Appts   Exit

- The entire series is then updated with the change. Click “Exit”

Startdate	Day	Starttime	Endtime	Select
10/06/2014	MONDAY	06:00 PM	07:00 PM	<input type="checkbox"/>
10/13/2014	MONDAY	06:00 PM	07:00 PM	<input type="checkbox"/>
10/20/2014	MONDAY	06:00 PM	07:00 PM	<input type="checkbox"/>
10/27/2014	MONDAY	06:00 PM	07:00 PM	<input type="checkbox"/>
11/03/2014	MONDAY	06:00 PM	07:00 PM	<input type="checkbox"/>

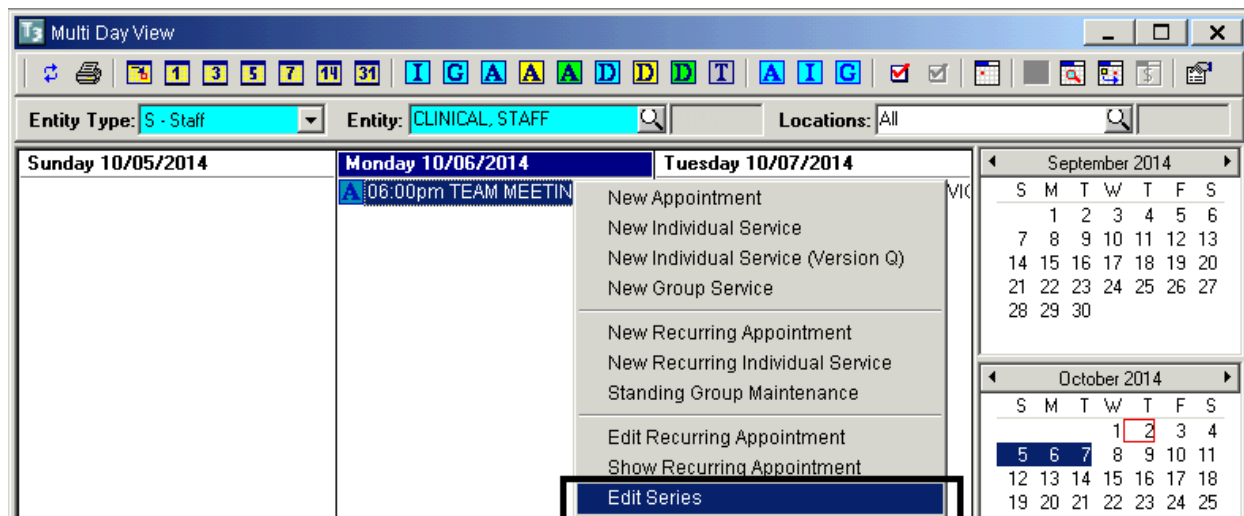
☒ Unresolved Only   ☐ All   Copy Date:

Copy an Appointment   Select All for Paste   Paste Appointment   Deselect All

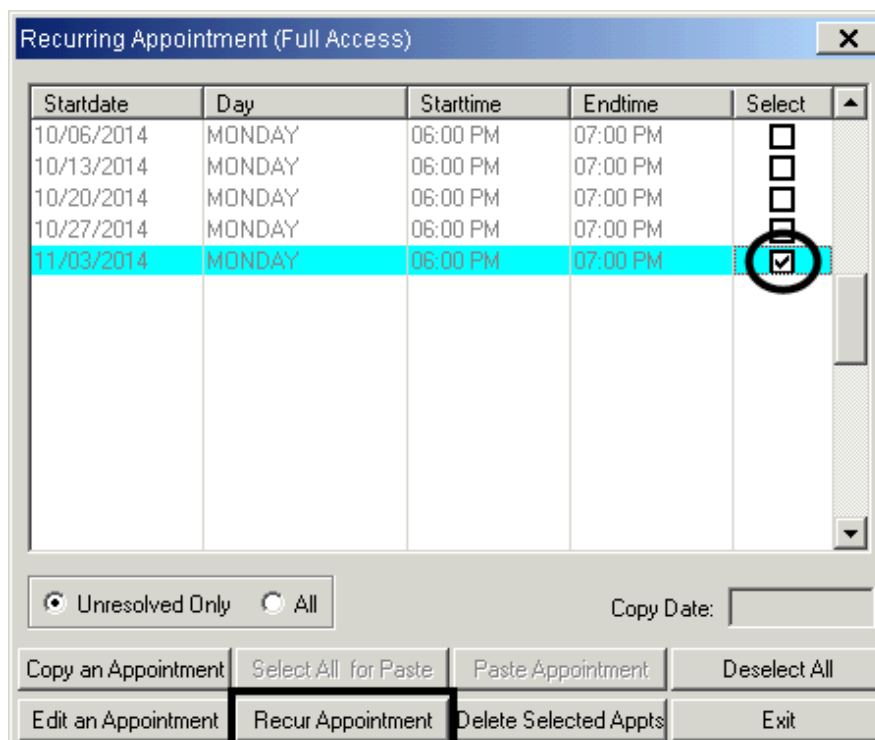
Edit an Appointment   Recur Appointment   Delete Selected Appts   Exit

## RECUR EXPIRED APPOINTMENT EVENT

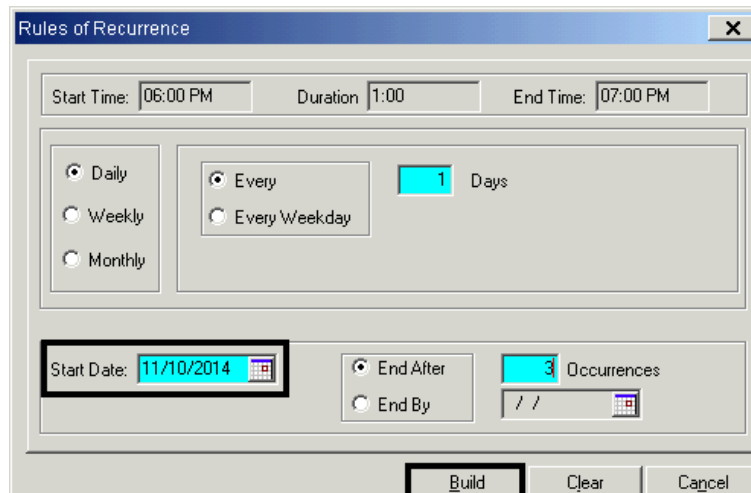
- If a recurring appointment is expiring, and you wish to add more occurrences to the series, right click on any appointment in the series, and click “Edit Series”



- Check the box next to the last appointment in the series, and click “Recur Appointment”

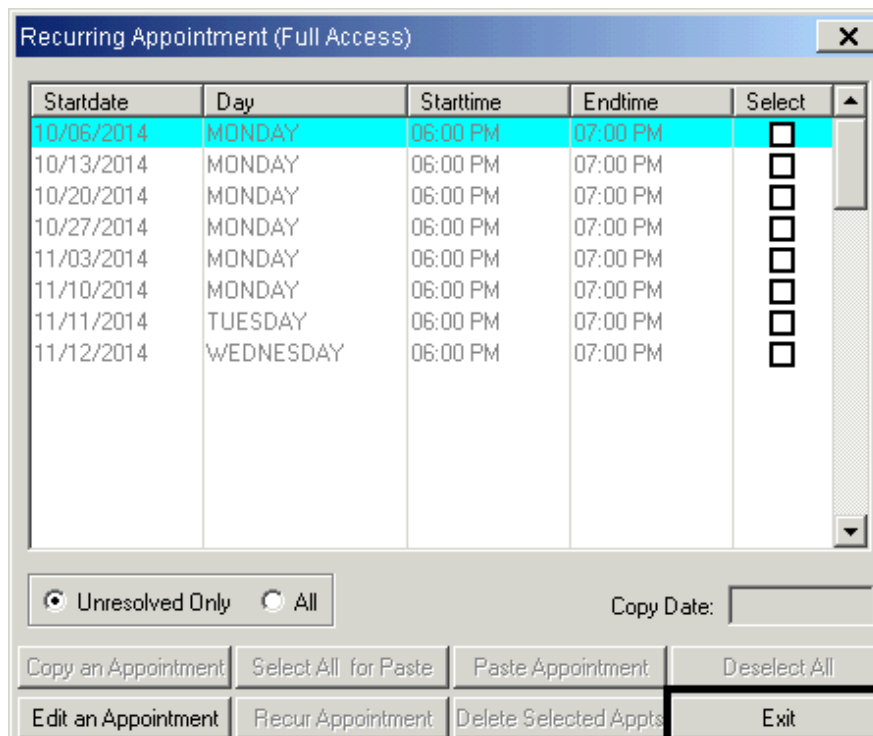


- Set the Rules of Recurrence. Make sure the Start Date is the first day that is not already scheduled (otherwise duplicate appointments will appear). Click “Build”



The "Rules of Recurrence" dialog box is shown. It has a title bar with a close button. The main area contains fields for "Start Time" (06:00 PM), "Duration" (1:00), and "End Time" (07:00 PM). Below these are radio buttons for "Daily", "Weekly", and "Monthly". The "Daily" option is selected, and there is a sub-section with "Every" (selected) and "Every Weekday", followed by a text box containing "1" and the word "Days". At the bottom, there is a "Start Date" field with the date "11/10/2014" and a calendar icon. To its right are radio buttons for "End After" (selected) and "End By", followed by a text box containing "3" and the word "Occurrences". At the very bottom are three buttons: "Build", "Clear", and "Cancel".

- “Exit” from the Rules of Recurrence



The "Recurring Appointment (Full Access)" dialog box is shown. It has a title bar with a close button. The main area is a table with the following columns: "Startdate", "Day", "Starttime", "Endtime", and "Select". The table contains the following data:

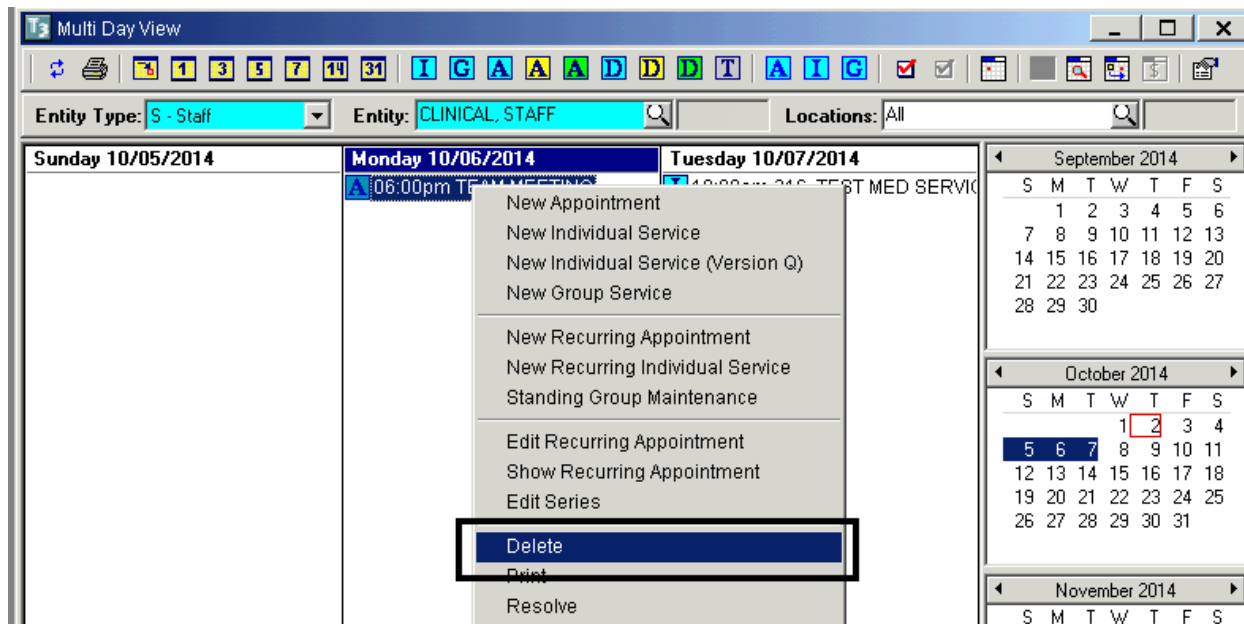
Startdate	Day	Starttime	Endtime	Select
10/06/2014	MONDAY	06:00 PM	07:00 PM	<input type="checkbox"/>
10/13/2014	MONDAY	06:00 PM	07:00 PM	<input type="checkbox"/>
10/20/2014	MONDAY	06:00 PM	07:00 PM	<input type="checkbox"/>
10/27/2014	MONDAY	06:00 PM	07:00 PM	<input type="checkbox"/>
11/03/2014	MONDAY	06:00 PM	07:00 PM	<input type="checkbox"/>
11/10/2014	MONDAY	06:00 PM	07:00 PM	<input type="checkbox"/>
11/11/2014	TUESDAY	06:00 PM	07:00 PM	<input type="checkbox"/>
11/12/2014	WEDNESDAY	06:00 PM	07:00 PM	<input type="checkbox"/>

Below the table are two radio buttons: "Unresolved Only" (selected) and "All". To the right is a "Copy Date:" label and a text box. At the bottom are two rows of buttons: "Copy an Appointment", "Select All for Paste", "Paste Appointment", "Deselect All" in the first row; and "Edit an Appointment", "Recur Appointment", "Delete Selected Appts", "Exit" in the second row.



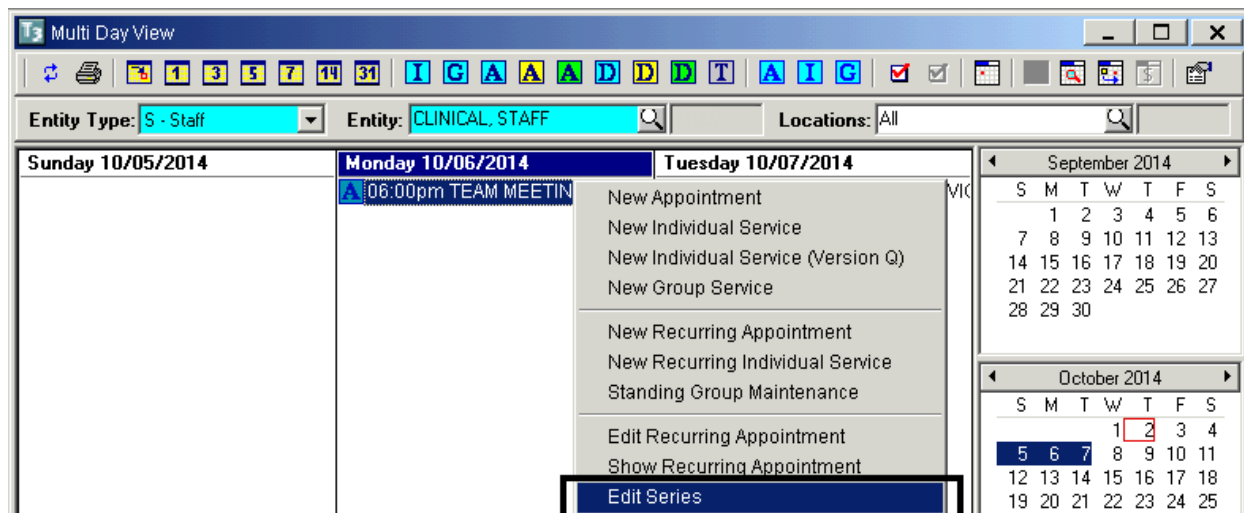
## DELETE ONE APPOINTMENT EVENT

- Right click on the desired appointment and click “Delete”



## DELETE SERIES OF APPOINTMENT EVENTS

- Right click on any appointment in the series, and click “Edit Series”



- 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	<input type="checkbox"/>
10/13/2014	MONDAY	06:00 PM	07:00 PM	<input type="checkbox"/>
10/20/2014	MONDAY	06:00 PM	07:00 PM	<input checked="" type="checkbox"/>
10/27/2014	MONDAY	06:00 PM	07:00 PM	<input type="checkbox"/>
11/03/2014	MONDAY	06:00 PM	07:00 PM	<input type="checkbox"/>
11/10/2014	MONDAY	06:00 PM	07:00 PM	<input checked="" type="checkbox"/>
11/11/2014	TUESDAY	06:00 PM	07:00 PM	<input type="checkbox"/>
11/12/2014	WEDNESDAY	06:00 PM	07:00 PM	<input checked="" type="checkbox"/>

☒ Unresolved Only    ☐ All    Copy Date:

Copy an Appointment    Select All for Paste    Paste Appointment    Deselect All  
 Edit an Appointment    Recur Appointment    **Delete Selected Appts**    Exit

- They are then removed from the series. Click “Exit”

Startdate	Day	Starttime	Endtime	Select
10/06/2014	MONDAY	06:00 PM	07:00 PM	<input type="checkbox"/>
10/13/2014	MONDAY	06:00 PM	07:00 PM	<input type="checkbox"/>
10/20/2014	MONDAY	06:00 PM	07:00 PM	<input checked="" type="checkbox"/>
10/27/2014	MONDAY	06:00 PM	07:00 PM	<input type="checkbox"/>
11/03/2014	MONDAY	06:00 PM	07:00 PM	<input type="checkbox"/>
11/10/2014	MONDAY	06:00 PM	07:00 PM	<input checked="" type="checkbox"/>
11/11/2014	TUESDAY	06:00 PM	07:00 PM	<input type="checkbox"/>
11/12/2014	WEDNESDAY	06:00 PM	07:00 PM	<input checked="" type="checkbox"/>

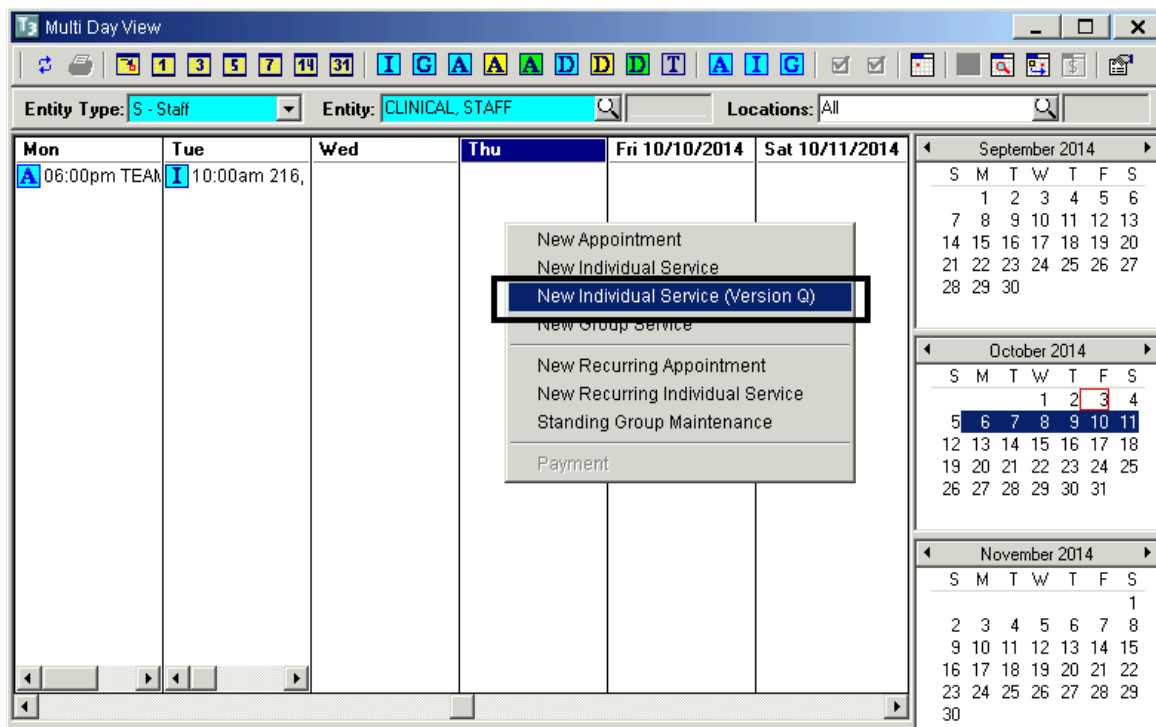
☒ Unresolved Only    ☐ All    Copy Date:

Copy an Appointment    Select All for Paste    Paste Appointment    Deselect All  
 Edit an Appointment    Recur Appointment    Delete Selected Appts    **Exit**

## 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



- 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
- 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
- Select the client from the “Client Look Up” screen
- 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

Individual Service Entry (Version Q)

Subject: Translator needed for client (A)

Date: 10/09/2014 Start Time: 12:00 PM (B)

Duration: 1:15

Stop Time: 1:15 PM

Client: (C) 0

Unit: TRAINING UNIT (D) 9900

Sub Unit: TRAINING SUBUNIT 9901

Location: TRAINING LOCATION01 9999

Staff: CLINICAL, STAFF (E) 0

Service: 0

Quantity: 0.00 Fee: 0.00

☐ Transportation Required EBP/SS

Provided To:

Provided At:

Outside Facility: 0

Contact Type:

Appointment Type: 0

Billing Type:

Intensity Type:

Billing Pro Forma Save Clear Exit

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

Service Codes Lookup

ID	Desc
5	SCREENING 5
9	ASSESSMNT PSYCHSOC INTERACT 9
10	ASSESSMENT - PSYCHOSOCIAL 10
11	MEDICATION EVALUATION 11
12	PSYCHOLOGICAL TESTING 12
13	PLAN DEVELOPMENT 13
14	EVAL OF RECRD FOR ASSESSMNT 14
15	EXTERNAL REPORT PREPARATION 15
16	PSYCH TEST-TECHNICIAN 16

☒ Active ☐ Inactive ☐ All Find... OK 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
C	Correctional Facility	8
L	Crisis Residential	1
F	Faith Based (church)	f
G	Health Care - Primary Care	g
H	Home	2
E	Homeless/Emerg Shelter	5
K	IP Free Stndg Hosp/IMD/SH	6
D	IP Full Scale Hosp/SNF	9

- Enter an “Outside Facility” if “K”, “D”, or an “S” is selected as the place of service

ID	Description
325	ABRAVAS CONTINUATION HIGH-PO
794	ACADEMY FOR LEARNING-BU
99	ADA W. HARRIS ELEMENTARY-CA
437	ADAMS ELEMENTARY-SD
347	ADOBE-BLUFFS ELEMENTARY-PO
706	ALAMOSA PARK ELEMENTARY-VU
421	ALBA-SD
405	ALBERT EINSTEIN ACA CHARTER-SD
589	ALBERT EINSTEIN ACAD CHARTE-SD
438	ALCOTT ELEMENTARY-SD
791	ALL TRIBES AMER INDIAN CHAR-VP
106	ALLEN (ELLA B.) CH
59	ALPINE COMMUNITY DAY-AU
53	ALPINE ELEMENTARY-AU
653	ALTA VISTA ACADEMY-SW
693	ALTA VISTA HIGH-VU
766	ALVIN M. DUNN ELEMENTARY-SM
168	AM HERITAGE K-8 CHARTER-EE
439	ANGIER ELEMENTARY-SD
101	ANNE AND WM HEDENKAMP ELEME-CH
71	ANZA ELEMENTARY-CV

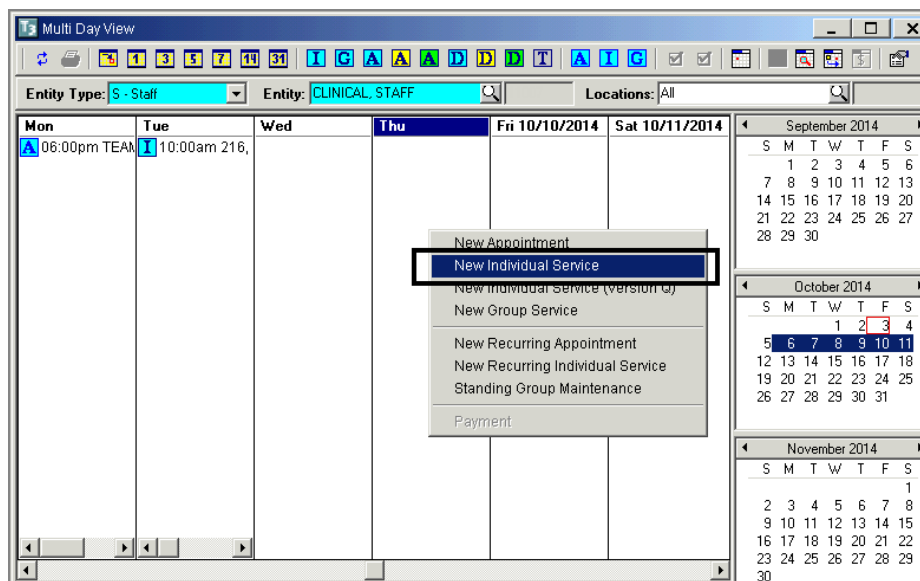
- The other indicators can be changed if desired. Click “Save”

<input type="checkbox"/> Transportation Required	EBP/SS	
Provided To:	Client	
Provided At:	School	
Outside Facility:	COMMUNITY SCHOOLS - CENTRAL-DE	
Contact Type:	Face to Face	
Appointment Type:	Scheduled	
Billing Type:	Not Applicable	
Intensity Type:	NOT APPLICABLE	

Billing Pro Forma	<b>Save</b>	Clear	Exit
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## 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 Individual Service Scheduled for CLINICAL, STAFF (Administrative Access)**

Event ! This Normal Event has not been Saved.

Subject:  Start Time:  Duration:  Pre-Payment:  0.00

Date:  10/08/2014 Client:  Location:  Stop Time:

Unit:  Comment:

Sub Unit:

**Services** Event Does Not Exist.

Staff...	Service	Start Time	End Time	Resolved	Canceled
<input checked="" type="checkbox"/> Created				<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Not Created					

☒ Scheduled ☐ Actual

Form #:  0 Date:  /  /  ☐ C. Servers

Staff:  Supervisor:

Unit:  Assignment:  SubUnit:

Sub Unit:

Service:

Lab:

Days:  0 Quan:  0.00 Fee:  0.00 Part:  0

☐ Transportation Reqd  EBP/SS

Prov. At:

Con.Type:

Bill. Type:

S. Start:  Duration:  Stop:

T. Start:  Duration:  Stop:

D. Start:  Duration:  Stop:

Prov. To:

Out. Fac:

Appt.Type:

Int. Type:

- Complete the necessary information in the top container and click “Save”

- The Collateral Server button and the bottom container activate. Click the “Coll. Svrs” button

- 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
2 OUTDOOR STAFF	01:00 PM	1:45	2:45 PM



- Enter the necessary information in the bottom container, click “Post/Save Service”, and click “Exit”

Add/Edit Individual Service Scheduled for CLINICAL, STAFF (Administrative 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 Location: TRAINING LOCATION

Unit: TRAINING UNIT 9900 Comment:

Sub Unit: TRAINING SUBUNIT 9901

Save Delete Clear Coll. Svcs

**Services** Adding New Scheduled Service.

Staff...	Service	Start Time	End Time	Resolved	Canceled
<input checked="" type="checkbox"/> Created				<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Not Created					

☒ Scheduled ☐ Actual Resolve Service Cancel Service Add Unscheduled Add Delete Clear

Form #: 0 Date: 10/05/2014 ☐ C. Servers

Staff: CLINICAL, STAFF Supervisor:

Unit: TRAINING UNIT 9900 Assignment: Unit SubUnit

Sub Unit: TRAINING SUBUNIT 9901 9900 - TRAINING UNIT 9901 - TRAINING SUBUNIT

Service: CASE MGT / BROKERAGE 50 50 S. Start: 1:00 PM Duration: 1:45 Stop: 2:45 PM

Lab:  0 T. Start:  Duration:  Stop:

Days: 0 Quan: 0.00 Fee: 0.00 Part: 0 D. Start:  Duration:  Stop:

☐ Transportation Reqd EBP/SS Prov. To: Client  C

Prov. At:  Out. Fac:  0

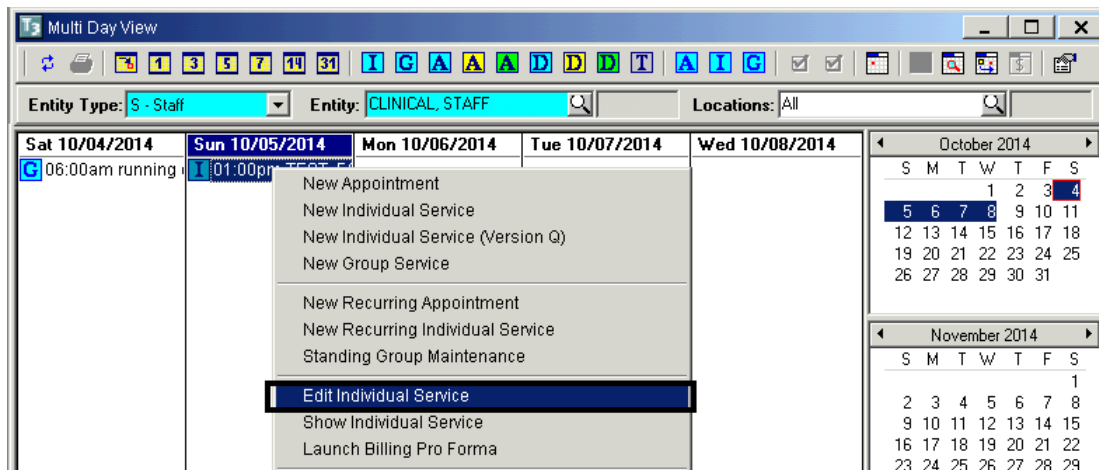
Con.Type:  Appt.Type: Scheduled  1

Bill. Type: Not Applicable ☒ X Int. Type: NOT APPLICABLE  N

Post/Save Service Billing Pro Forma Event Log Print Payment Exit

## 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 Individual Service Scheduled for CLINICAL, STAFF (Administrative Access)

**Event** This Normal Event has not been Saved.

Subject: CASE MGT / BROKERAGE 50 Pre-Payment: 0.00

Date: 10/05/2014 Start Time: 1:00 PM Duration: 1:45 Stop Time: 2:45 PM

Client: FAKE, TEST Location: TRAINING LOCATION

Unit: TRAINING UNIT 9900 Comment:

Sub Unit: TRAINING SUBUNIT 9901

**Services** Editing Server/Service.

Staff...	Service	Start Time	End Time	Resolved	Canceled
CLINICAL, STAFF	(50) CASE MGT / BROKERAGE	01:00 PM	02:45 PM	<input type="checkbox"/>	<input type="checkbox"/>

☒ Created ☐ Not Created

☒ Scheduled ☐ Actual

Form #: 0 Date: 10/05/2014 ☐ C. Servers

Staff: CLINICAL, STAFF Supervisor:

Unit: TRAINING UNIT 9900 Assignment: Unit SubUnit

Sub Unit: TRAINING SUBUNIT 9901 9900 - TRAINING UNIT 9901 - TRAINING SUBUNIT

Service: CASE MGT / BROKERAGE 50 S. Start: 1:00 PM Duration: 1:45 Stop: 2:45 PM

Lab: 0 T. Start: Duration: Stop:

Days: 0 Quan: 0.00 Fee: 0.00 Part: 0 D. Start: Duration: Stop:

☐ Transportation Req'd EBP/SS

Prov. At: Client Prov. To: Out. Fac: 0

Con. Type: Appt. Type: Scheduled 1

Bill. Type: Not Applicable Int. Type: NOT APPLICABLE N

- The “Update Attendee and Calendar Records?” dialog box appears. Click “Proceed with Save”.



- Click “Exit”

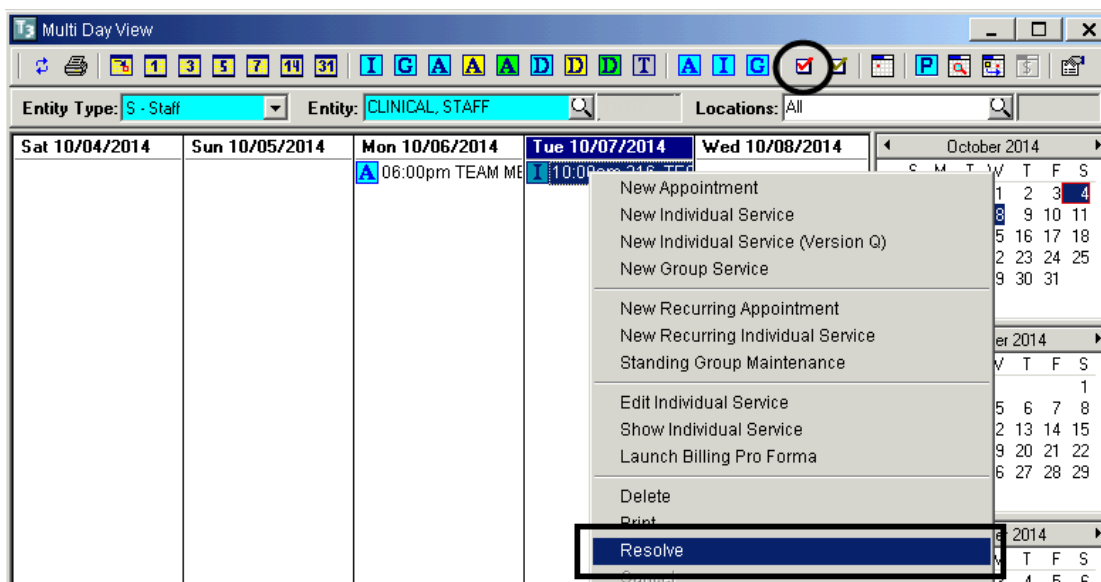
**NOTE-** A scheduled non-recurring Individual Service cannot be edited to become a recurring event

## RESOLVE/UNRESOLVE INDIVIDUAL SERVICE EVENT

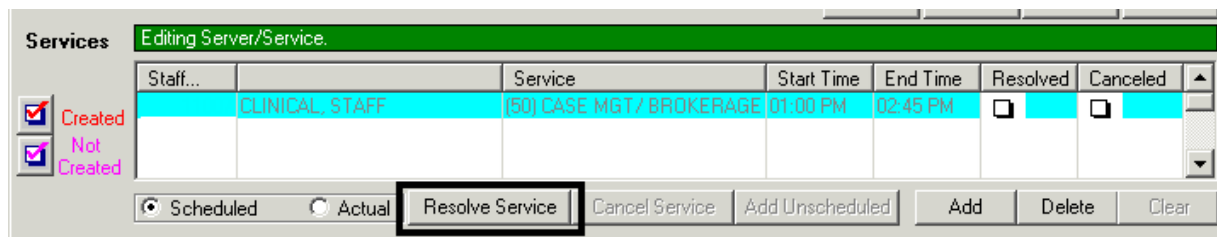
When an event is resolved, that indicates that the event took place. Events on future dates cannot be resolved. NOTE: SDCMHS policy regarding scheduled events is that service events that actually occurred shall be resolved. Service events that did not occur shall not be resolved.

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”



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

Staff...	Service	Start Time	End Time	Resolved	Canceled
CLINICAL, STAFF	(50) CASE MGT/ BROKERAGE	01:00 PM	02:45 PM	<input checked="" type="checkbox"/>	<input type="checkbox"/>

☒ Scheduled
 ☐ Actual

- Click “Exit”

☐ Transportation Reqd
 EBP/SS
 Prov. To: Client
 Out. Fac: 0
 Prov. At:
 Con. Type:
 Appt. Type: Scheduled
 Bill. Type: Not Applicable
 Int. Type: NOT APPLICABLE

- The event displays on the calendar with a pink check

Multi Day View

Entity Type: S - Staff Entity: CLINICAL, STAFF Locations: All

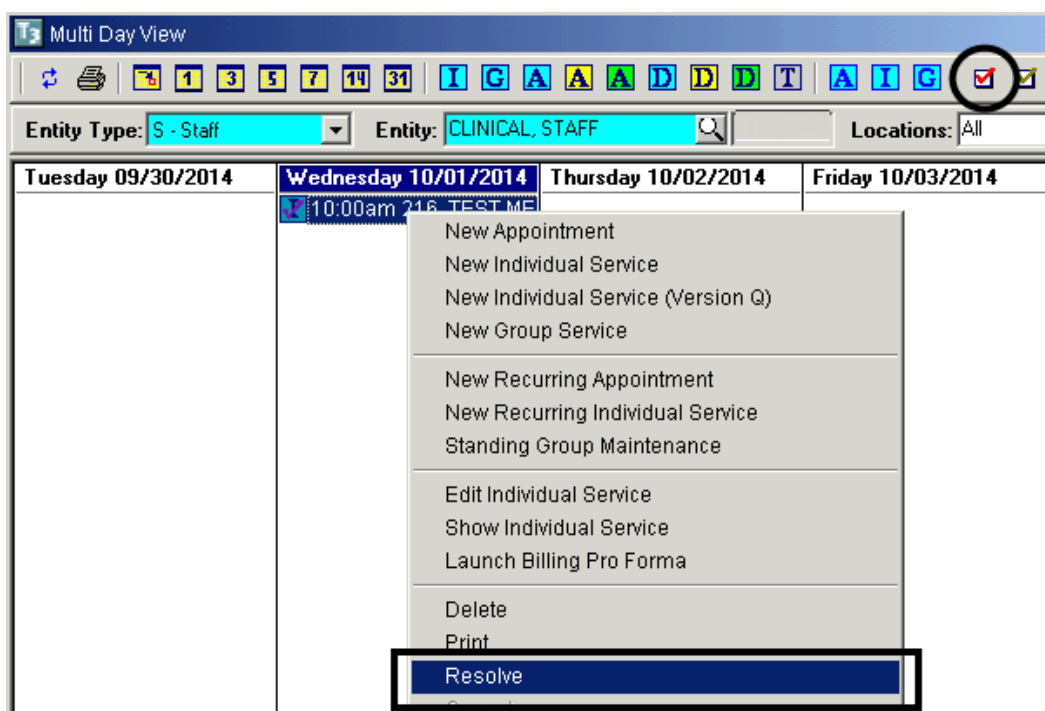
Tuesday 09/30/2014	Wednesday 10/01/2014	Thursday 10/02/2014	Friday 10/03/2014
	10:00am 216, TEST ME		

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

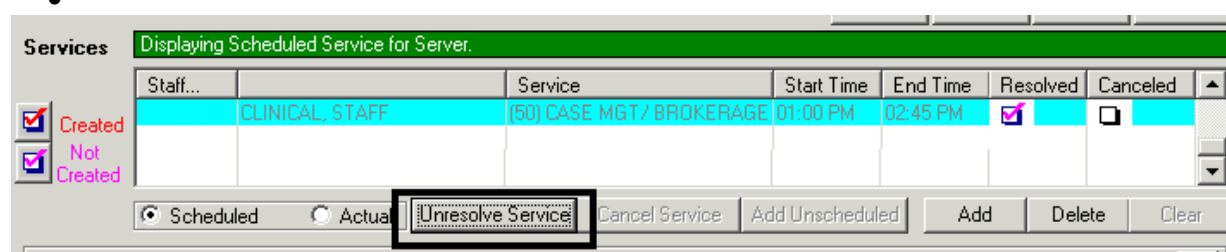
The only reason you would unresolve, is if you resolved by mistake.

There are two ways to unresolve an 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”



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

Staff...	Service	Start Time	End Time	Resolved	Canceled
CLINICAL, STAFF	(50) CASE MGT/ BROKERAGE	01:00 PM	02:45 PM	<input checked="" type="checkbox"/>	<input type="checkbox"/>

☒ Scheduled   ☐ Actual   
 Resolve Service   Cancel Service   Add Unscheduled   
 Add   Delete   Clear

- Click "Exit"

☐ Transportation Reqd   EBP/SS   
 Prov. To: Client   Out. Fac:   
 Con. Type:   Appt. Type: Scheduled   
 Bill. Type: Not Applicable   Int. Type: NOT APPLICABLE

Post/Save Service   Billing Pro Forma   
 Event Log   Print   Payment   **Exit**

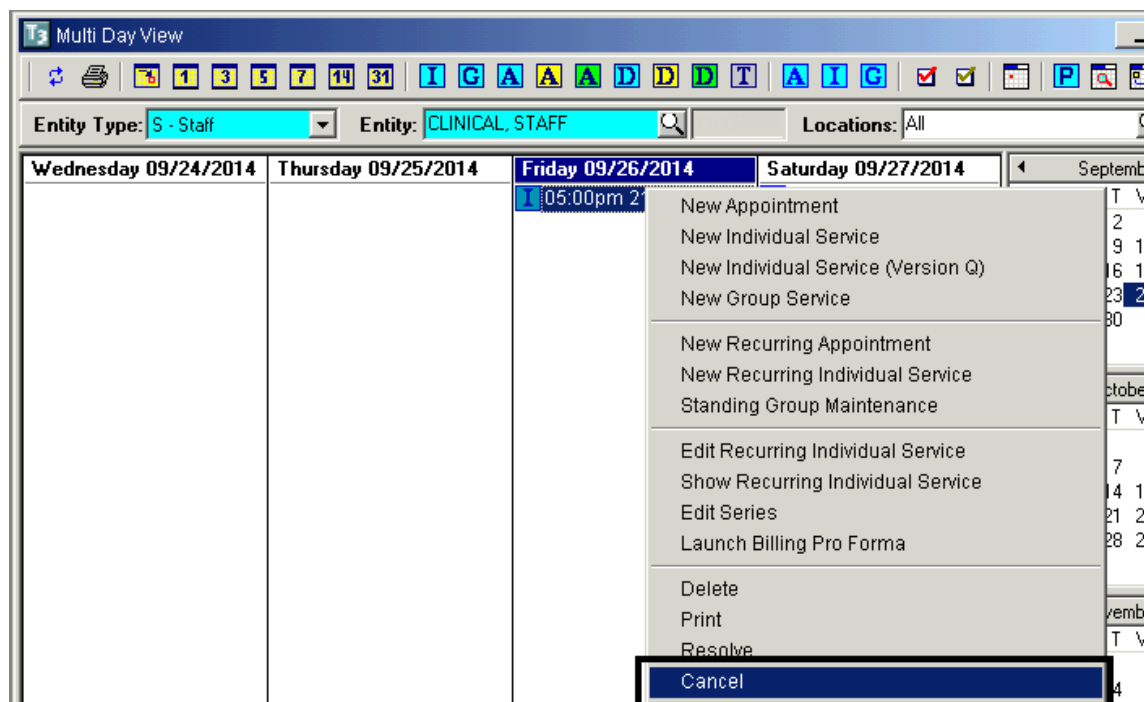
The event displays on the calendar without a pink check

Entity Type: S - Staff   Entity: CLINICAL, STAFF   Locations: All

Tuesday 09/30/2014	Wednesday 10/01/2014	Thursday 10/02/2014	Friday 10/03/2014
	I 10:00am 216, TEST ME		

## CANCEL/UNCANCEL

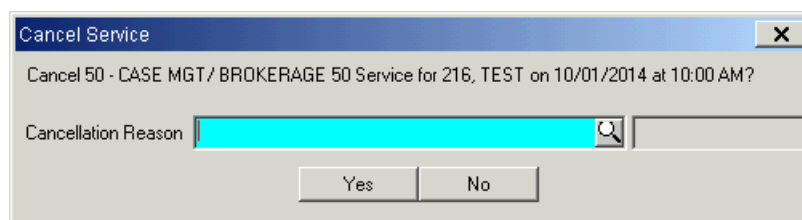
- Right click on the individual service event you wish to cancel, and from the drop down menu, click “Cancel”



- In the middle container, click “Cancel Service”

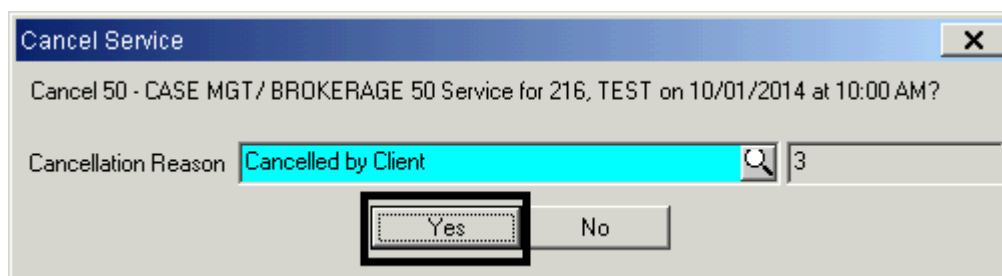


- The “Cancel Service” dialog box appears. Click the magnifying glass to access the “Cancellation Reason” table





- Once a cancellation reason is selected, click “Yes”



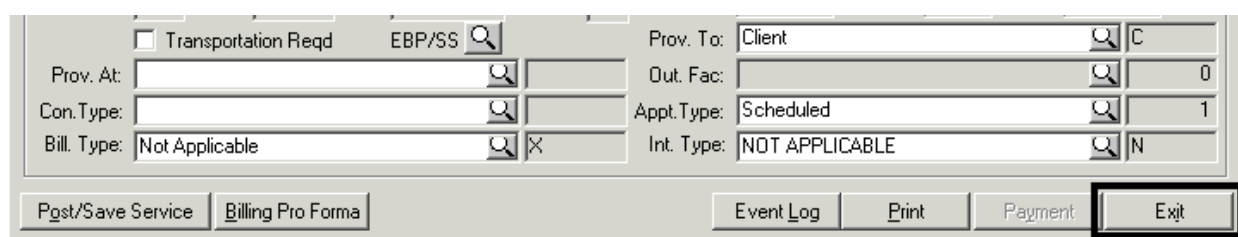
Cancel Service

Cancel 50 - CASE MGT/ BROKERAGE 50 Service for 216, TEST on 10/01/2014 at 10:00 AM?

Cancellation Reason: Cancelled by Client

Yes No

- Click “Exit”



Transportation Reqd: ☐ EBP/SS

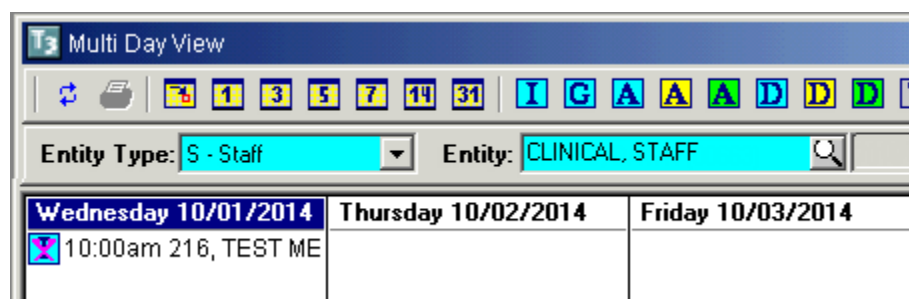
Prov. At: Out. Fac:

Con. Type: Appt. Type: Scheduled

Bill. Type: Not Applicable Int. Type: NOT APPLICABLE

Post/Save Service Billing Pro Forma Event Log Print Payment **Exit**

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



Multi Day View

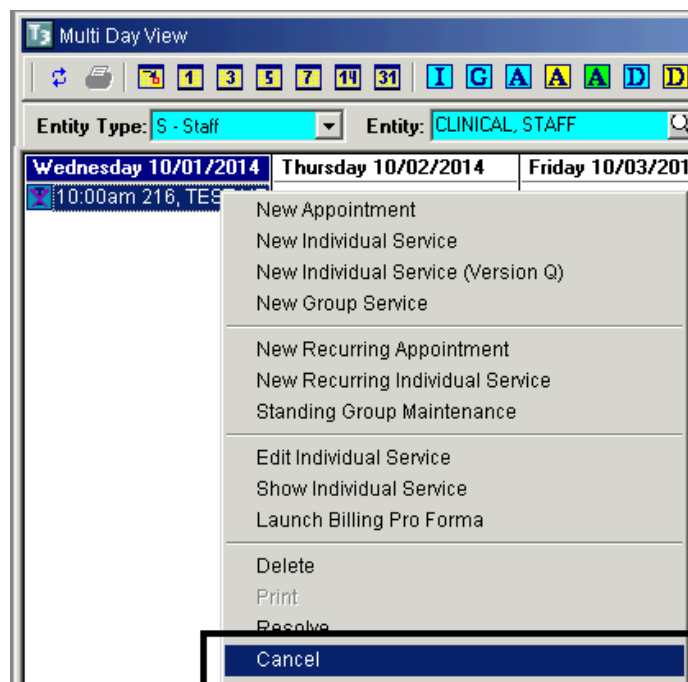
Entity Type: S - Staff Entity: CLINICAL, STAFF

Wednesday 10/01/2014	Thursday 10/02/2014	Friday 10/03/2014
10:00am 216, TEST ME		

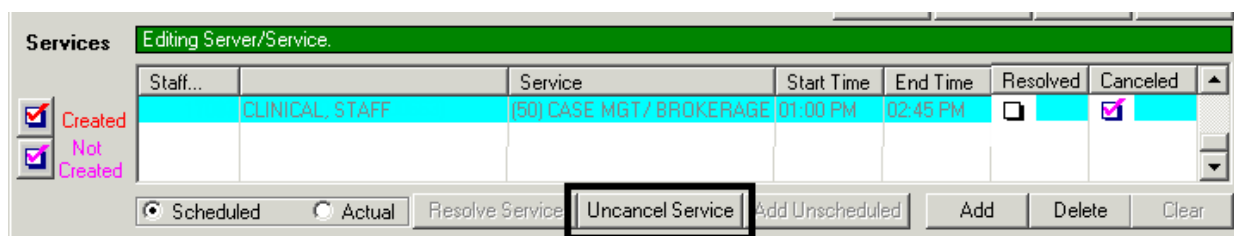
*NOTE: If the event does not display on the calendar, check the “View Options” to ensure the “Display Cancelled Services” box is checked*

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

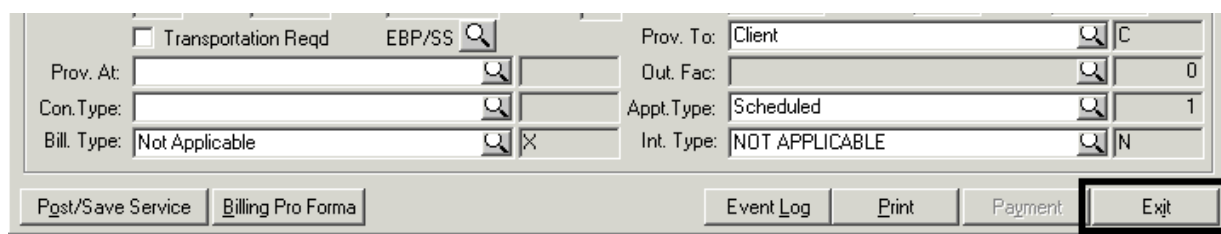
- Right click on the service you wish to uncanceled, and from the drop down menu, click "Cancel"



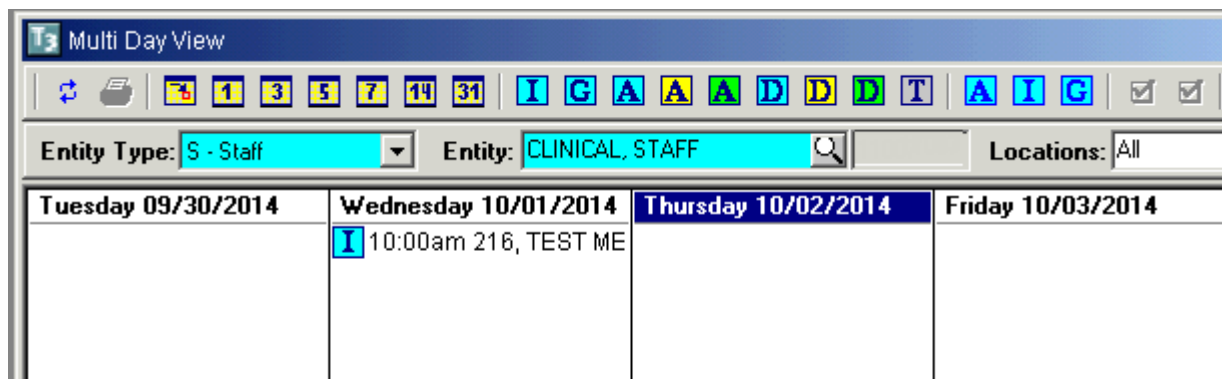
- Click the "Uncancel Service" button in the middle container



- Click "Exit" to return to the schedule



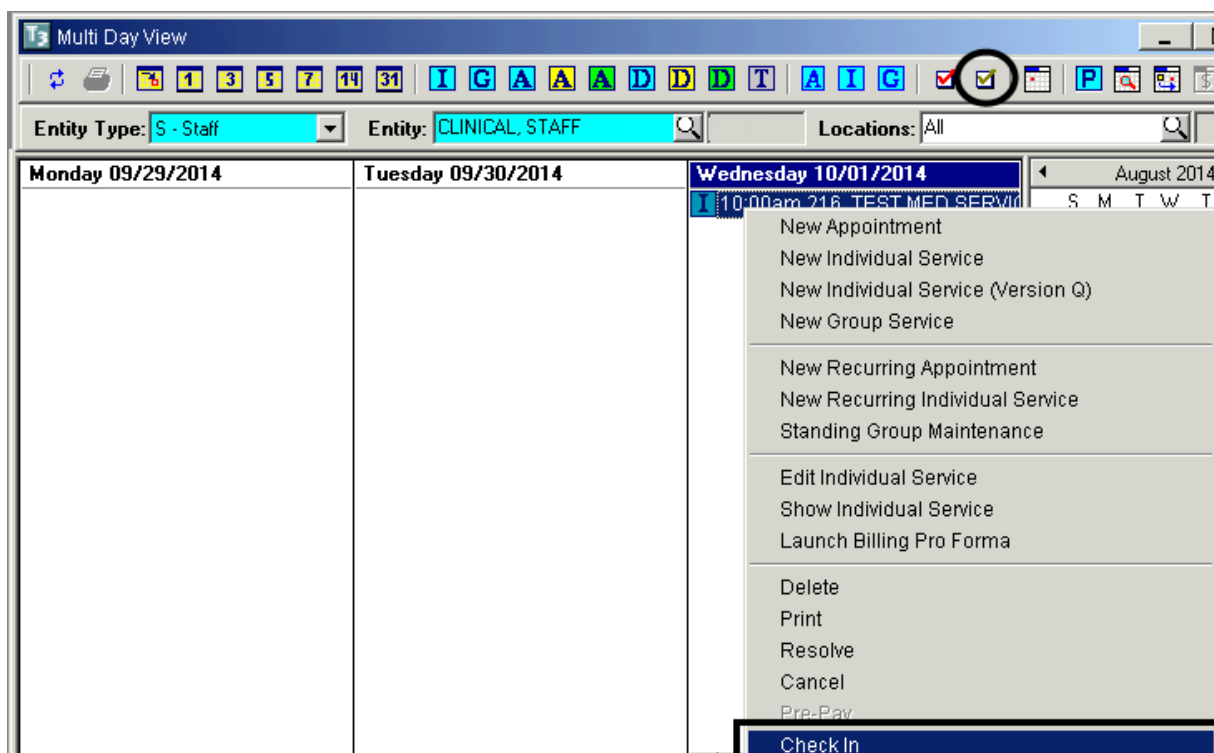
- The service event appears on the Multi Day View screen without the pink X



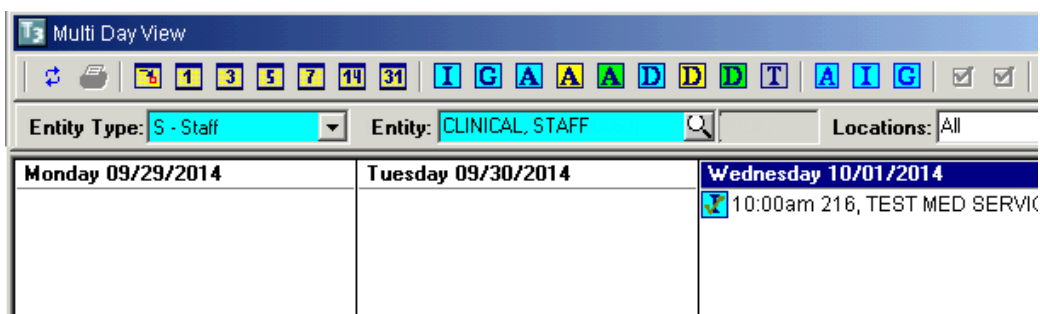
## CHECK IN/CHECK OUT

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”

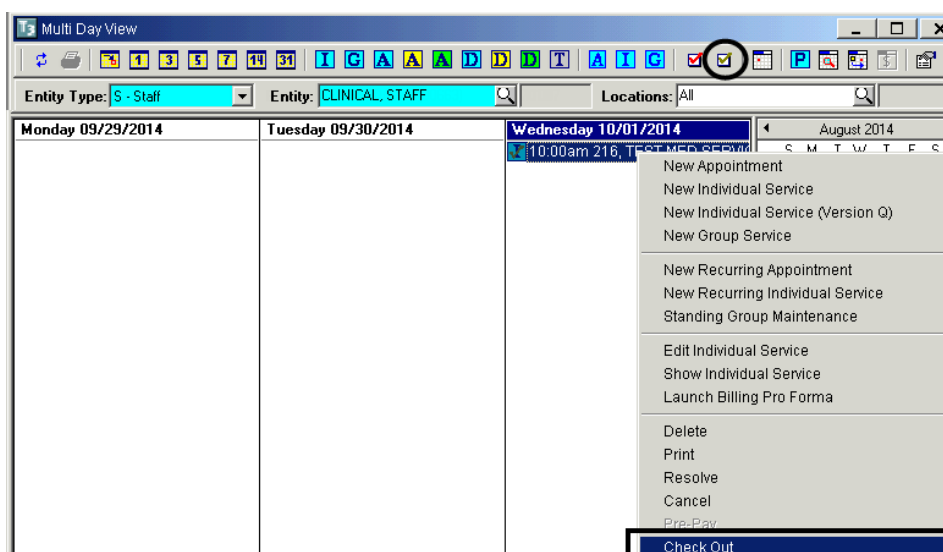


- A green check mark appears next to the event

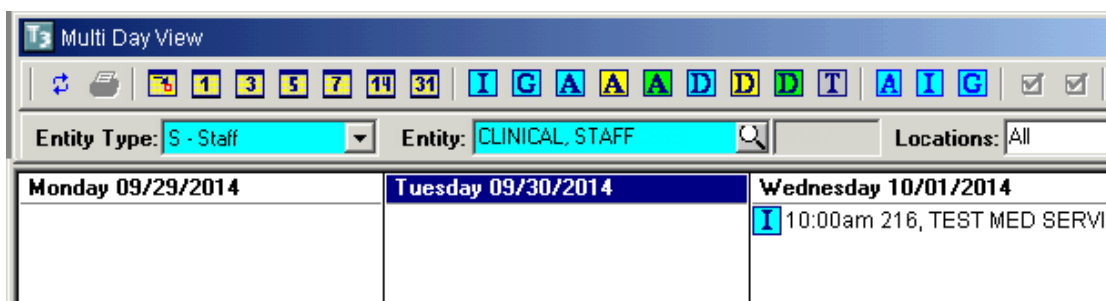


There are two ways to indicate that the client has checked out:

- 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”.

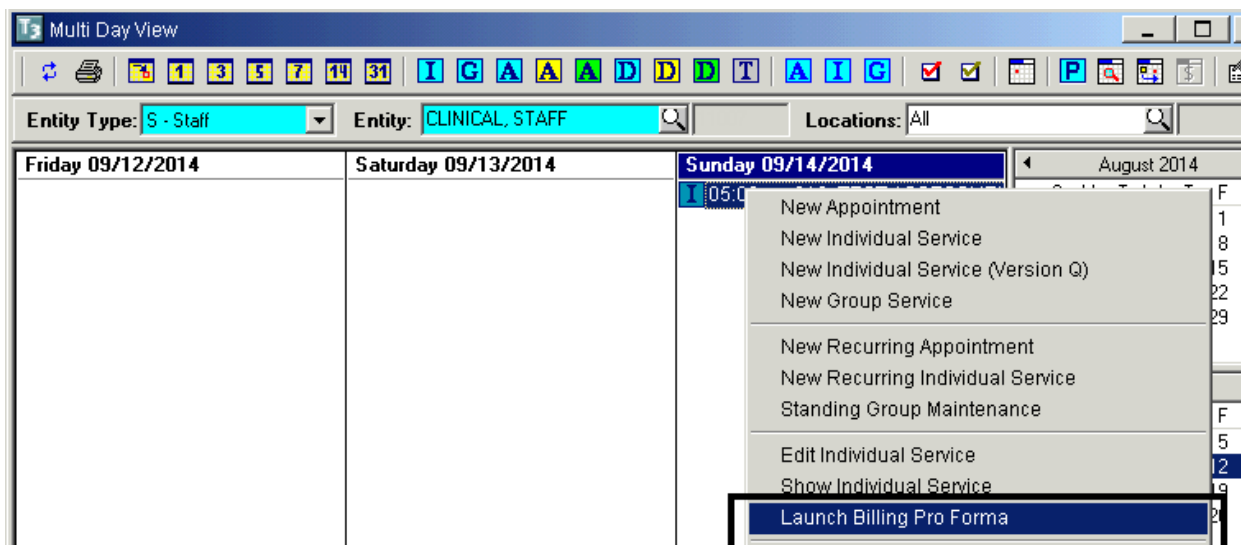


- The green check mark next to the event disappears



## 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"



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

The 'Billing Pro Forma Dialog' box contains the following information:

Client: 216, TEST    Admitted    Date: 09/14/2014    Start: 05:00 PM    Stop: 06:00 PM  
 SAI:    Duration: 1:00

Unit: TRAINING UNIT    9900  
 SubUnit: TRAINING SUBUNIT    9901

Server: CLINICAL, STAFF  
 Supervisor:

Service: ASSESSMENT - PSYCHOSOCIAL 10    10  
 Lab:

Quantity:    Fee:    Days:

Provided To: Client and Family    B  
 Provided At: School    S  
 Contact Type: Face to Face    F  
 Outside Facility: ANNE AND WM HEDENKAMP ELEME-C    101  
 Appointment Type: Scheduled    1  
 Billing Type: Not Applicable    X  
 Intensity Type: NOT APPLICABLE    N

Insurance

Pay So...	Benefit ...	From

Authorizations

Auth#	P.	Procedure	From	Thru	Qty	Used

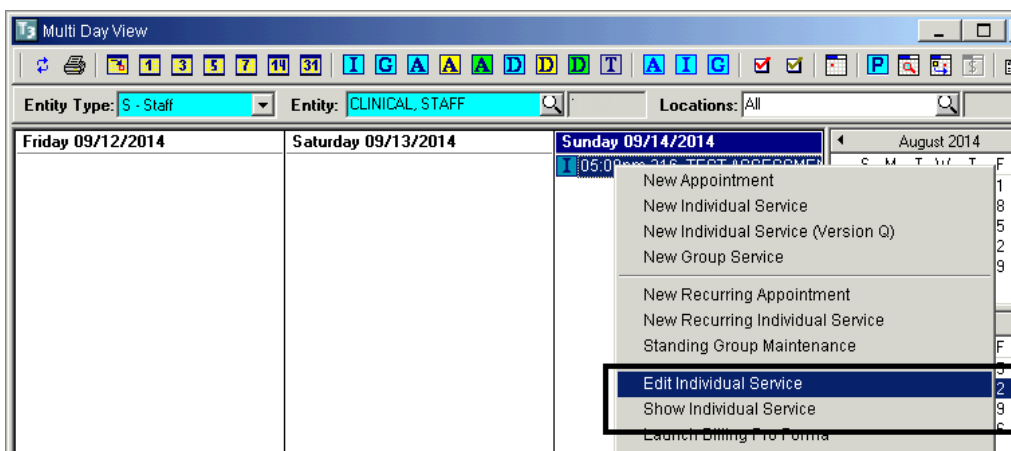
Billing Pro Forma

Testing Contract Pay Source 8999/8999  
 Determining Billing Information for NON BILLABLE FOR OSHPD, BEN  
 Service is not Covered by Benefit Plan 8999.  
 Looking up Client's Insurance Coverages.  
 Testing Contract Pay Source 8998/4010  
 Determining Billing Information for NON BILLABLE FOR LIHP, LIHP  
 Service is not Covered by Benefit Plan 4010.  
 Testing Contract Pay Source 8998/4105  
 Determining Billing Information for NON BILLABLE FOR LIHP, LIHP C  
 Service is not Covered by Benefit Plan 4105.  
 Testing Contract Pay Source 8998/4109

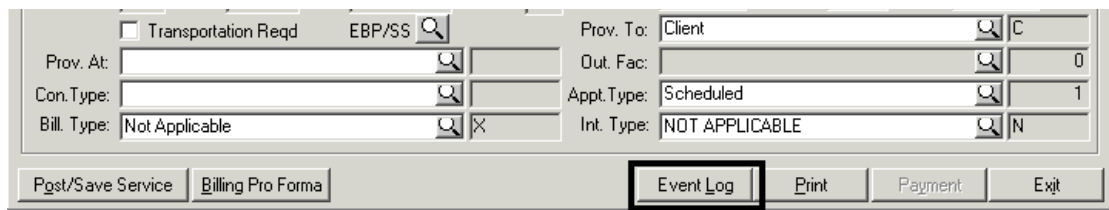
Colla...    OK

## EVENT LOG WITH CANCELLED SERVICE EVENT

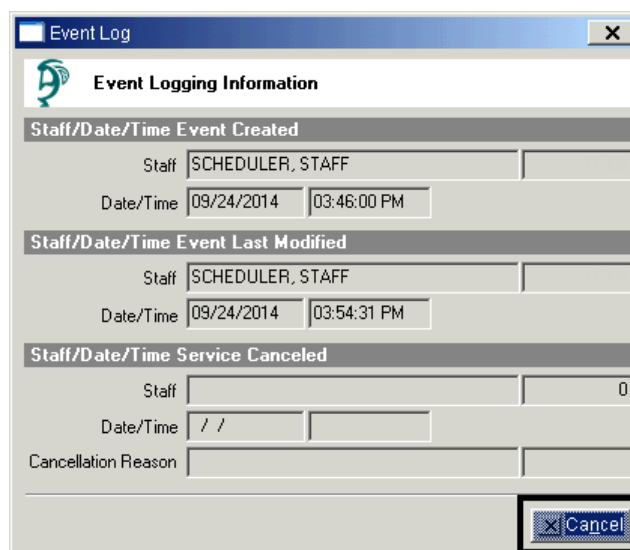
- Open the individual service window either by double clicking on the service event, or by right clicking and choosing “Edit Individual Service” or “Show Individual Service” from the drop down menu



- Click “Event Log”



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



- Click “Exit”

The screenshot shows a form with the following fields and values:

<input type="checkbox"/> Transportation Req'd	EBP/SS	Prov. To: Client	Out. Fac: 0
Prov. At:		Appt. Type: Scheduled	1
Con. Type:		Int. Type: NOT APPLICABLE	N
Bill. Type: Not Applicable			

Buttons at the bottom: Pgst/Save Service, Billing Pro Forma, Event Log, Print, Payment, and **Exit** (highlighted with a red box).

## PRINT CONSUMER ENCOUNTER FORM

The Consumer Encounter form includes information about the selected event.

- Right click on the desired event and click “Print”

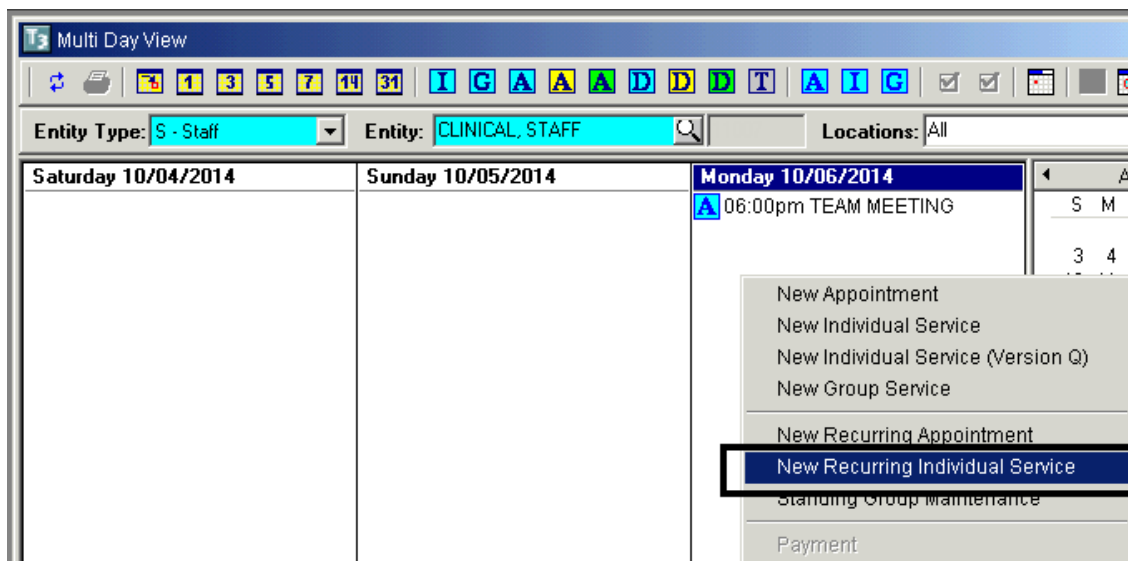
The screenshot shows the 'Multi Day View' calendar interface. The 'Entity Type' is set to 'S - Staff' and the 'Entity' is 'CLINICAL STAFF'. The calendar displays dates from Wednesday 09/24/2014 to Friday 09/26/2014. A right-click context menu is open over the Friday 09/26/2014 date, showing options such as 'New Appointment', 'New Individual Service', 'New Recurring Appointment', and 'Print'. The 'Print' option is highlighted with a red box.

**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



- The “Rules of Recurrence” screen appears. Enter the appropriate information and click “Build”



- 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 Individual Service Scheduled for CLINICAL, STAFF (Administrative Access)

Event **I** This Recurring Event has not been Saved.

Subject: \_\_\_\_\_ 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 9901

Save Delete Clear Coll. Svcs

- Enter the appropriate information in the bottom container and click “Post/Save Service”

Form #: 0 Date: 10/05/2014 ☐ C. Servers

Staff: CLINICAL, STAFF Supervisor: \_\_\_\_\_

Unit: TRAINING UNIT 9900 Assignment: Unit SubUnit

Sub Unit: TRAINING SUBUNIT 9901 9900 - TRAINING UNIT 9901 - TRAINING SUBI

Service: ASSESSMENT - PSYCHOSOCIAL 10 S. Start: 4:00 PM Duration: 1:00 Stop: 5:00 PM

Lab: \_\_\_\_\_ T. Start: \_\_\_\_\_ Duration: \_\_\_\_\_ Stop: \_\_\_\_\_

Days: 0 Quan: 0.00 Fee: 0.00 Part: 0 D. Start: \_\_\_\_\_ Duration: \_\_\_\_\_ Stop: \_\_\_\_\_

☐ Transportation Req'd EBP/SS \_\_\_\_\_

Prov. At: Office A Prov. To: Client C

Con.Type: Face to Face F Out. Fac: \_\_\_\_\_ 0

Bill. Type: Not Applicable X Appt.Type: Scheduled 1

Int. Type: NOT APPLICABLE N

Post/Save Service Billing Pro Forma Event Log Print Payment Exit

- Click “Exit”

Form #: 0 Date: 10/05/2014 ☐ C. Servers

Staff: CLINICAL, STAFF Supervisor: \_\_\_\_\_

Unit: TRAINING UNIT 9900 Assignment: Unit SubUnit

Sub Unit: TRAINING SUBUNIT 9901 9900 - TRAINING UNIT 9901 - TRAINING SUBI

Service: ASSESSMENT - PSYCHOSOCIAL 10 S. Start: 4:00 PM Duration: 1:00 Stop: 5:00 PM

Lab: \_\_\_\_\_ T. Start: \_\_\_\_\_ Duration: \_\_\_\_\_ Stop: \_\_\_\_\_

Days: 0 Quan: 0.00 Fee: 0.00 Part: 0 D. Start: \_\_\_\_\_ Duration: \_\_\_\_\_ Stop: \_\_\_\_\_

☐ Transportation Req'd EBP/SS \_\_\_\_\_

Prov. At: Office A Prov. To: Client C

Con.Type: Face to Face F Out. Fac: \_\_\_\_\_ 0

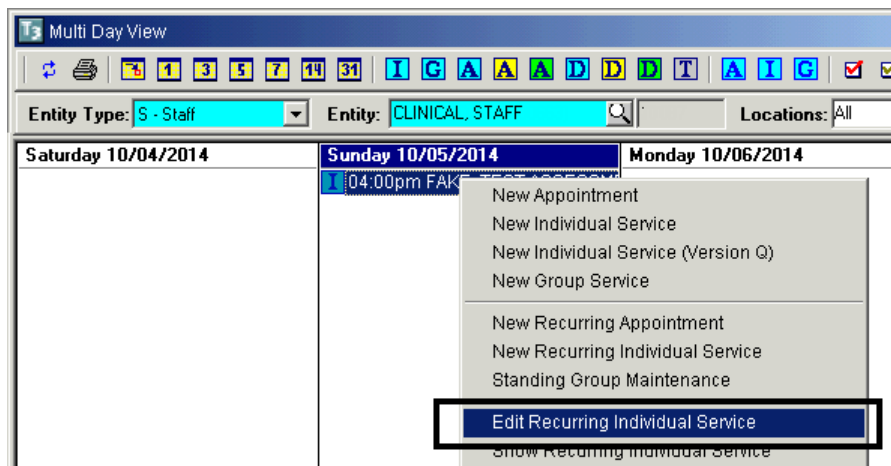
Bill. Type: Not Applicable X Appt.Type: Scheduled 1

Int. Type: NOT APPLICABLE N

Post/Save Service Billing Pro Forma Event Log Print 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 Individual Service Scheduled for CLINICAL, STAFF (Administrative 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 9901

Save Delete Clear Coll. Svrs

Services Editing Server/Service.

Staff...	Service	Start Time	End Time	Resolved	Canceled
CLINICAL, STAFF	(10) ASSESSMENT - PSYCHOSOCIAL 10	04:00 PM	05:00 PM	<input type="checkbox"/>	<input type="checkbox"/>

☒ Created ☐ Not Created

☒ Scheduled ☐ Actual Resolve Service Cancel Service Add Unscheduled Add Delete Clear

Form #: 0 Date: 10/05/2014 ☐ C. Servers

Staff: CLINICAL, STAFF Supervisor: 0

Unit: TRAINING UNIT 9900 Assignment: Unit SubUnit

Sub Unit: TRAINING SUBUNIT 9901 9900 - TRAINING UNIT 9901 - TRAINING SUBUNIT

Service: ASSESSMENT - PSYCHOSOCIAL 10 10 S. Start: 4:00 PM Duration: 1:00 Stop: 5:00 PM

Lab: 0 T. Start: Duration: Stop:

Days: 0 Quan: 0.00 Fee: 0.00 Part: 0 D. Start: Duration: Stop:

☐ Transportation Reqd EBP/SS

Prov. At: Office A

Con. Type: Face to Face F

Bill. Type: Not Applicable X

Prov. To: Client C

Out. Fac: 0

Appt. Type: Scheduled 1

Int. Type: NOT APPLICABLE N

Post/Save Service Billing Pro Forma Event Log Print Payment Exit

- The “Update Attendee and Calendar Records?” dialog box appears. Click “Proceed with Save”.

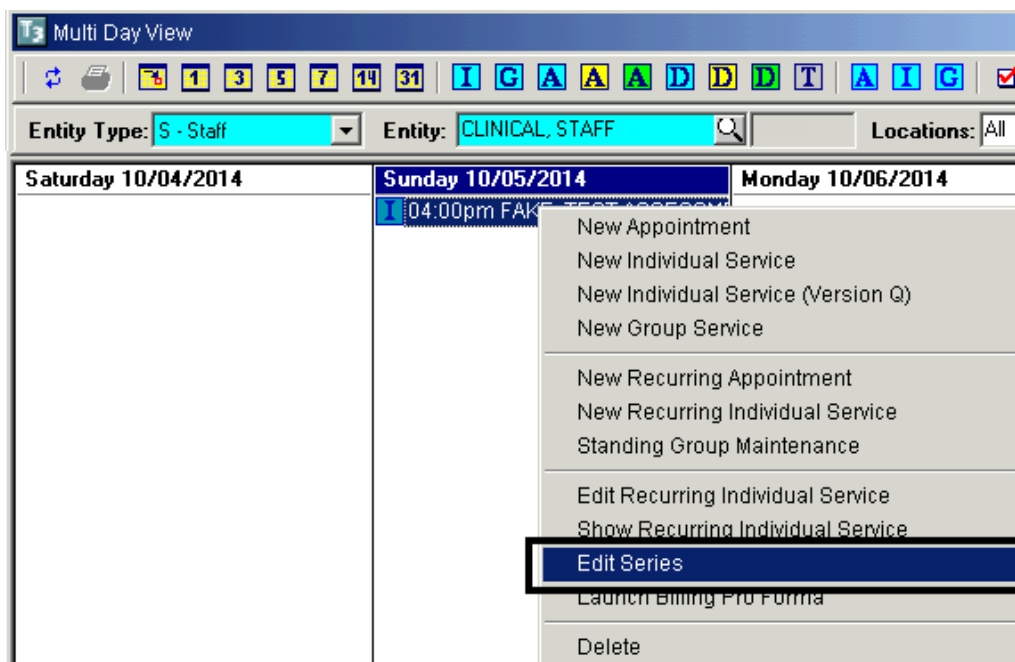


- Click “Exit”

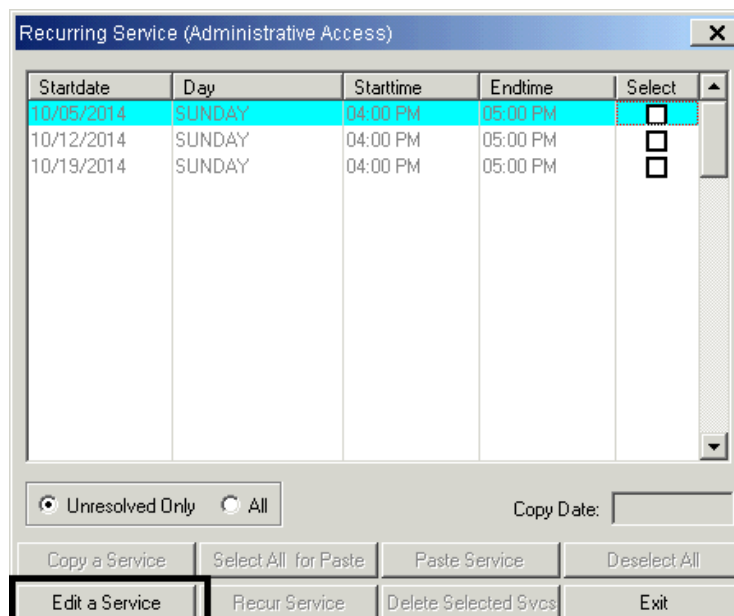
<input type="checkbox"/> Transportation Req'd	EBP/SS <input type="checkbox"/>	Prov. To: Client	C
Prov. At: Office	A	Out. Fac:	0
Con. Type: Face to Face	F	Appt. Type: Scheduled	1
Bill. Type: Not Applicable	X	Int. Type: NOT APPLICABLE	N

## 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”



- 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 Individual Service Scheduled for CLINICAL, STAFF (Administrative 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 9901

**Services** Editing Server/Service.

Staff...	Service	Start Time	End Time	Resolved	Canceled
CLINICAL STAFF	(10)ASSESSMENT - PSYCHOS	04:00 PM	05:00 PM	<input type="checkbox"/>	<input type="checkbox"/>

☒ Created ☐ Not Created

☒ Scheduled ☐ Actual

Form #: 0 Date: 10/05/2014 ☐ C. Servers

Staff: CLINICAL STAFF Supervisor: 0  
 Unit: TRAINING UNIT 9900 Assignment: Unit SubUnit  
 Sub Unit: TRAINING SUBUNIT 9901 9900 - TRAINING UNIT 9901 - TRAINING SUBI  
 Service: ASSESSMENT - PSYCHOSOCIAL 10 10 S. Start: 4:00 PM Duration: 1:00 Stop: 5:00 PM  
 Lab: 0 T. Start: Duration: Stop:  
 Days: 0 Quan: 0.00 Fee: 0.00 Part: 0 D. Start: Duration: Stop:  
☐ Transportation Reqd EBP/SS  
 Prov. At: Office A Out. Fac: 0  
 Con. Type: Face to Face F Appt. Type: Scheduled 1  
 Bill. Type: Not Applicable X Int. Type: NOT APPLICABLE N

- Click “Exit”

☐ Transportation Reqd EBP/SS

Prov. At: Office A Out. Fac: 0  
 Con. Type: Face to Face F Appt. Type: Scheduled 1  
 Bill. Type: Not Applicable X Int. Type: NOT APPLICABLE N

- 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”

Startdate	Day	Starttime	Endtime	Select
10/05/2014	SUNDAY	05:00 PM	06:00 PM	<input checked="" type="checkbox"/>
10/12/2014	SUNDAY	04:00 PM	05:00 PM	<input type="checkbox"/>
10/19/2014	SUNDAY	04:00 PM	05:00 PM	<input type="checkbox"/>

☒ Unresolved Only    ☐ All    Copy Date:

**Copy a Service**    Select All for Paste    Paste Service    Deselect All

Edit a Service    Recur Service    Delete Selected 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”

Startdate	Day	Starttime	Endtime	Select
10/05/2014	SUNDAY	05:00 PM	06:00 PM	<input type="checkbox"/>
10/12/2014	SUNDAY	04:00 PM	05:00 PM	<input type="checkbox"/>
10/19/2014	SUNDAY	04:00 PM	05:00 PM	<input type="checkbox"/>

☒ Unresolved Only    ☐ All    Copy Date: 10/05/2014

Copy a Service    **Select All for Paste**    Paste Service    Deselect All

Edit a Service    Recur Service    Delete Selected Svcs    Exit

- Click “Paste Service” which copies the change to the services you selected

Startdate	Day	Starttime	Endtime	Select
10/05/2014	SUNDAY	05:00 PM	06:00 PM	<input type="checkbox"/>
10/12/2014	SUNDAY	04:00 PM	05:00 PM	<input checked="" type="checkbox"/>
10/19/2014	SUNDAY	04:00 PM	05:00 PM	<input checked="" type="checkbox"/>

☒ Unresolved Only    ☐ All    Copy Date: 10/05/2014

Copy a Service    **Select All for Paste**    **Paste Service**    Deselect All

Edit a Service    Recur Service    Delete Selected Svcs    Exit

- Click “Exit”

Startdate	Day	Starttime	Endtime	Select
10/05/2014	SUNDAY	05:00 PM	06:00 PM	<input type="checkbox"/>
10/12/2014	SUNDAY	05:00 PM	06:00 PM	<input type="checkbox"/>
10/19/2014	SUNDAY	05:00 PM	06:00 PM	<input type="checkbox"/>

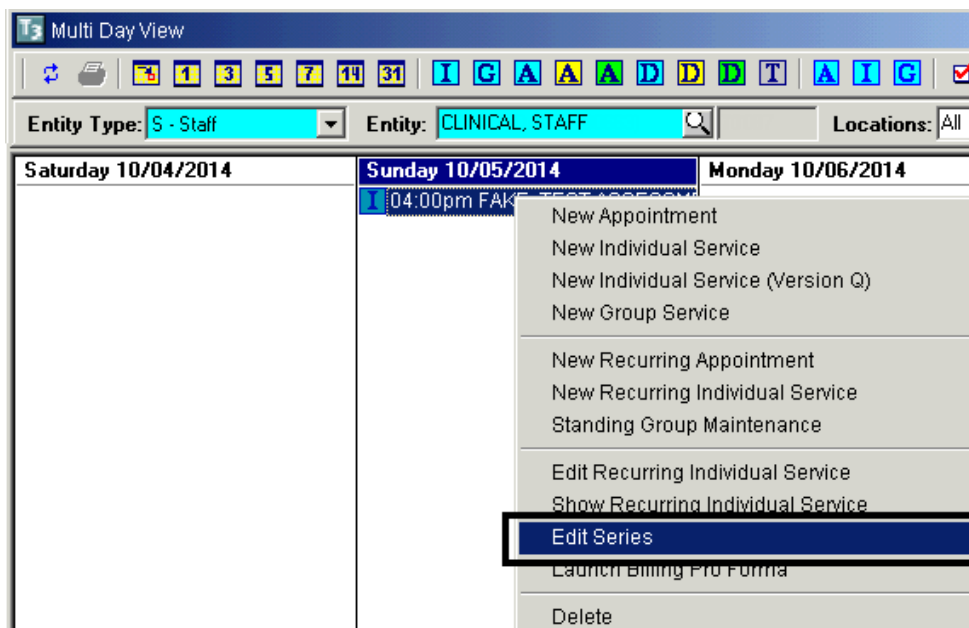
☒ Unresolved Only    ☐ All    Copy Date:

Copy a Service    Select All for Paste    Paste Service    Deselect All

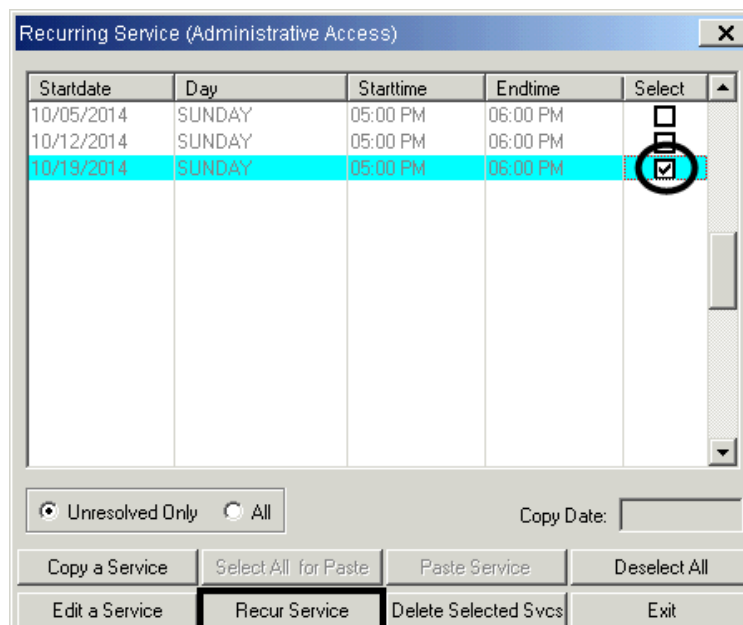
Edit a Service    Recur Service    Delete Selected Svcs    **Exit**

## RECUR EXPIRED SERVICE EVENT

- Right click on any individual service event in the series and click “Edit Series”

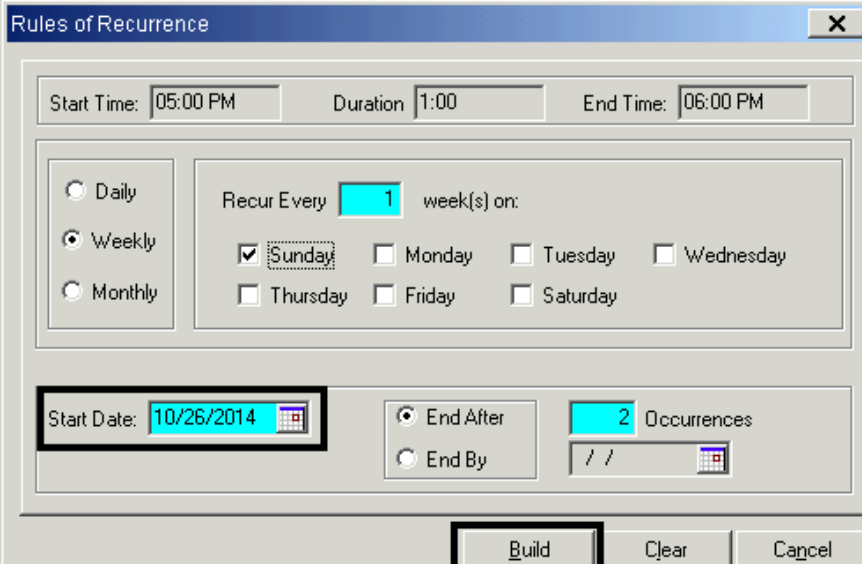


- The “Recurring Service” window displays. Check the bottom select box and click “Recur Service”



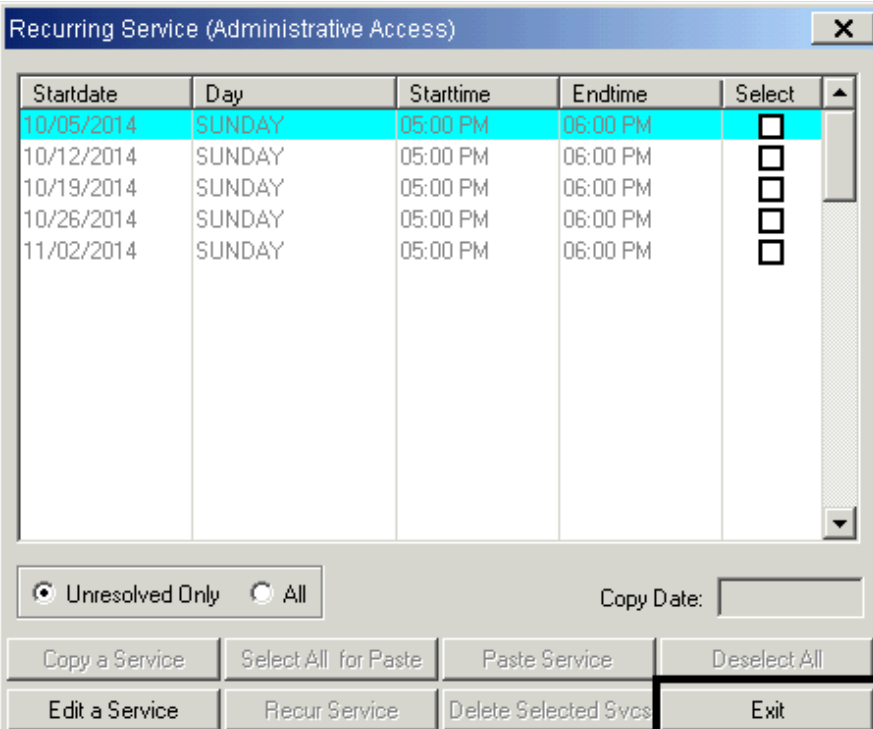


- Set the “Rules of Recurrence”. Make sure the Start Date is the first day that is not already scheduled (otherwise duplicate appointments will appear). Click “Build”



The "Rules of Recurrence" dialog box is shown. It has a title bar with a close button. The main area contains fields for "Start Time" (05:00 PM), "Duration" (1:00), and "End Time" (06:00 PM). Below these are radio buttons for "Daily", "Weekly" (selected), and "Monthly". To the right of the "Weekly" button, it says "Recur Every 1 week(s) on:". Below this are checkboxes for the days of the week: Sunday (checked), Monday, Tuesday, Wednesday, Thursday, Friday, and Saturday. At the bottom, there is a "Start Date" field with the date 10/26/2014 and a calendar icon. To its right are radio buttons for "End After" (selected) and "End By". Next to "End After" is a field with the number 2 and the word "Occurrences". To the right of "End By" is a date field with slashes and a calendar icon. At the bottom right are three buttons: "Build", "Clear", and "Cancel".

- Exit from the Recurring Service window

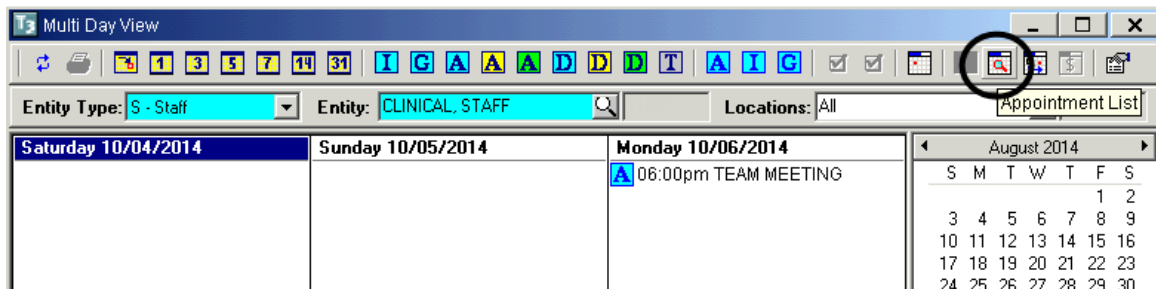


The "Recurring Service (Administrative Access)" window is shown. It has a title bar with a close button. The main area is a table with the following columns: Startdate, Day, Starttime, Endtime, and Select. The table contains five rows of data, all for SUNDAY from 05:00 PM to 06:00 PM. The first row is highlighted in blue. Below the table are two radio buttons: "Unresolved Only" (selected) and "All". To the right of these is a "Copy Date:" field. At the bottom are eight buttons arranged in two rows: "Copy a Service", "Select All for Paste", "Paste Service", "Deselect All", "Edit a Service", "Recur Service", "Delete Selected Svcs", and "Exit".

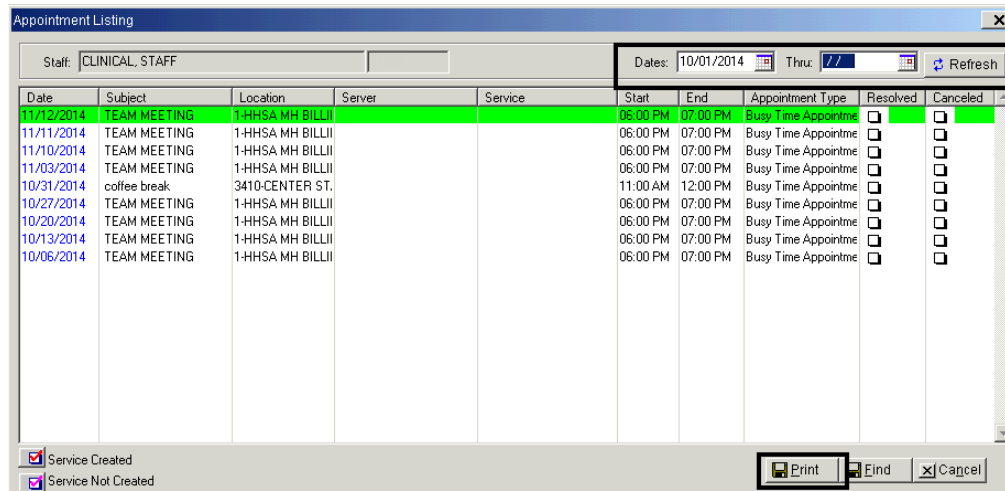
Startdate	Day	Starttime	Endtime	Select
10/05/2014	SUNDAY	05:00 PM	06:00 PM	<input type="checkbox"/>
10/12/2014	SUNDAY	05:00 PM	06:00 PM	<input type="checkbox"/>
10/19/2014	SUNDAY	05:00 PM	06:00 PM	<input type="checkbox"/>
10/26/2014	SUNDAY	05:00 PM	06:00 PM	<input type="checkbox"/>
11/02/2014	SUNDAY	05:00 PM	06:00 PM	<input type="checkbox"/>

## APPOINTMENT LISTING

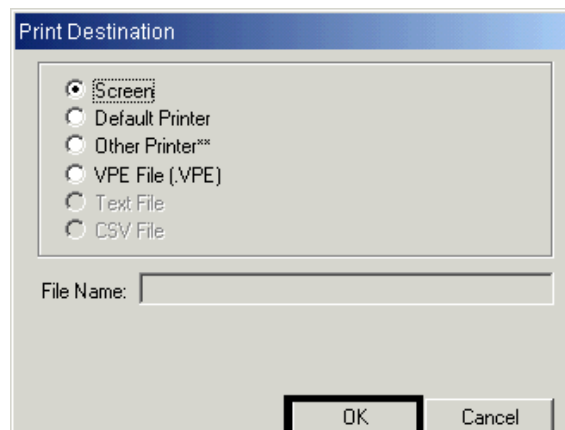
- To see the list of scheduled events for the “Entity” in the Multi Day View, click the “Appointment Listing” icon



- Adjust the dates accordingly, click “Refresh” and click “Print”



- Choose “Screen” as the Print Destination, and click “OK”



- Once you are done viewing, click “Close Preview”



- On the “Appointment Listing”, click “Cancel”

Appointment Listing

Staff: CLINICAL, STAFF Dates: 10/01/2014 Thru: // Refresh

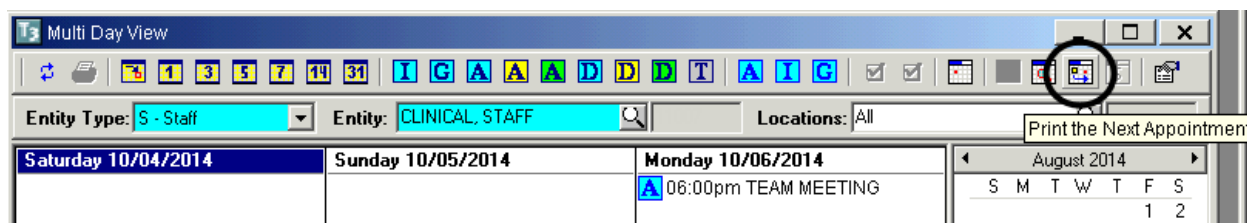
Date	Subject	Location	Server	Service	Start	End	Appointment Type	Resolved	Canceled
11/12/2014	TEAM MEETING	1-HHSA MH BILLI			06:00 PM	07:00 PM	Busy Time Appointme	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
11/11/2014	TEAM MEETING	1-HHSA MH BILLI			06:00 PM	07:00 PM	Busy Time Appointme	<input type="checkbox"/>	<input type="checkbox"/>
11/10/2014	TEAM MEETING	1-HHSA MH BILLI			06:00 PM	07:00 PM	Busy Time Appointme	<input type="checkbox"/>	<input type="checkbox"/>
11/03/2014	TEAM MEETING	1-HHSA MH BILLI			06:00 PM	07:00 PM	Busy Time Appointme	<input type="checkbox"/>	<input type="checkbox"/>
10/31/2014	coffee break	3410-CENTER ST.			11:00 AM	12:00 PM	Busy Time Appointme	<input type="checkbox"/>	<input type="checkbox"/>
10/27/2014	TEAM MEETING	1-HHSA MH BILLI			06:00 PM	07:00 PM	Busy Time Appointme	<input type="checkbox"/>	<input type="checkbox"/>
10/20/2014	TEAM MEETING	1-HHSA MH BILLI			06:00 PM	07:00 PM	Busy Time Appointme	<input type="checkbox"/>	<input type="checkbox"/>
10/13/2014	TEAM MEETING	1-HHSA MH BILLI			06:00 PM	07:00 PM	Busy Time Appointme	<input type="checkbox"/>	<input type="checkbox"/>
10/06/2014	TEAM MEETING	1-HHSA MH BILLI			06:00 PM	07:00 PM	Busy Time Appointme	<input type="checkbox"/>	<input type="checkbox"/>

☒ Service Created  
☒ Service Not Created

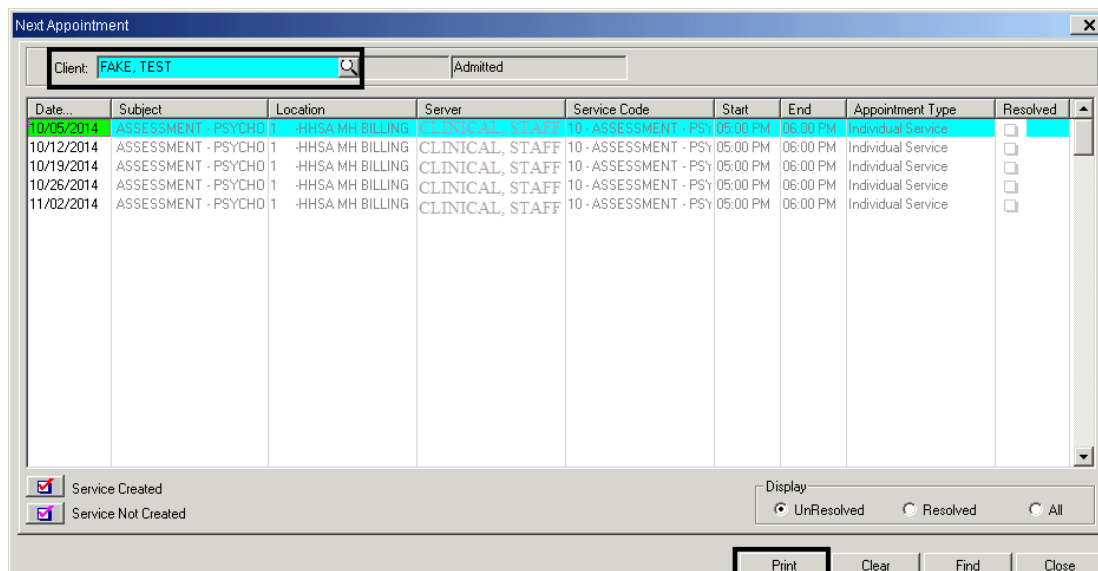
Print Find Cancel

## PRINT NEXT APPOINTMENT

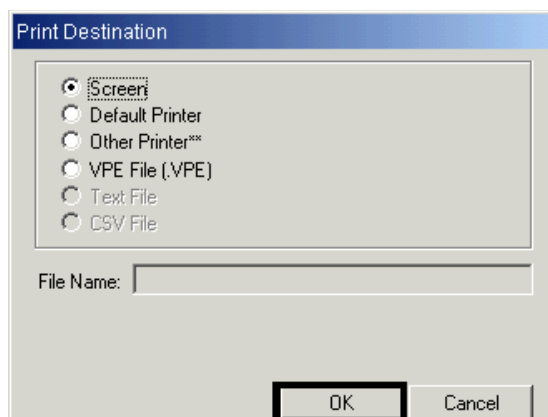
- To print the client's next service event, click the "Print Next Appointment" icon



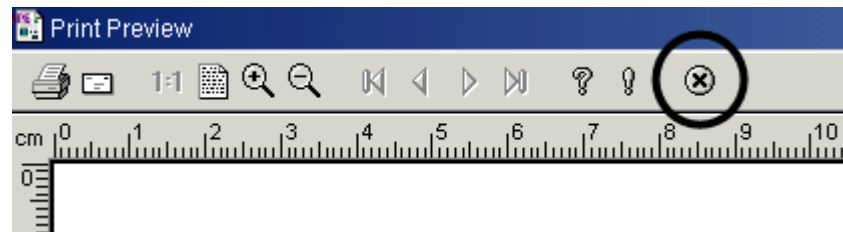
- Enter the desired client, click on the service event you wish to print, and click "Print"



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



- 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”

Next Appointment

Client: **FAKE, TEST** Admitted

Date	Subject	Location	Server	Service Code	Start	End	Appointment Type	Resolved
10/05/2014	ASSESSMENT - PSYCHO	-HHSA MH BILLING	CLINICAL, STAFF	10 - ASSESSMENT - PSY	05:00 PM	06:00 PM	Individual Service	<input type="checkbox"/>
10/12/2014	ASSESSMENT - PSYCHO	-HHSA MH BILLING	CLINICAL, STAFF	10 - ASSESSMENT - PSY	05:00 PM	06:00 PM	Individual Service	<input type="checkbox"/>
10/19/2014	ASSESSMENT - PSYCHO	-HHSA MH BILLING	CLINICAL, STAFF	10 - ASSESSMENT - PSY	05:00 PM	06:00 PM	Individual Service	<input type="checkbox"/>
10/26/2014	ASSESSMENT - PSYCHO	-HHSA MH BILLING	CLINICAL, STAFF	10 - ASSESSMENT - PSY	05:00 PM	06:00 PM	Individual Service	<input type="checkbox"/>
11/02/2014	ASSESSMENT - PSYCHO	-HHSA MH BILLING	CLINICAL, STAFF	10 - ASSESSMENT - PSY	05:00 PM	06:00 PM	Individual Service	<input type="checkbox"/>

☒ Service Created  
☒ Service Not Created

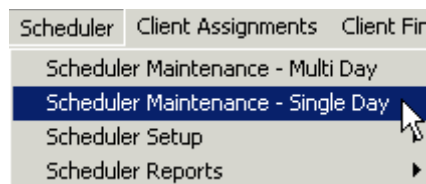
Display:  
☒ UnResolved ☐ Resolved ☐ All

Print Clear Find Close

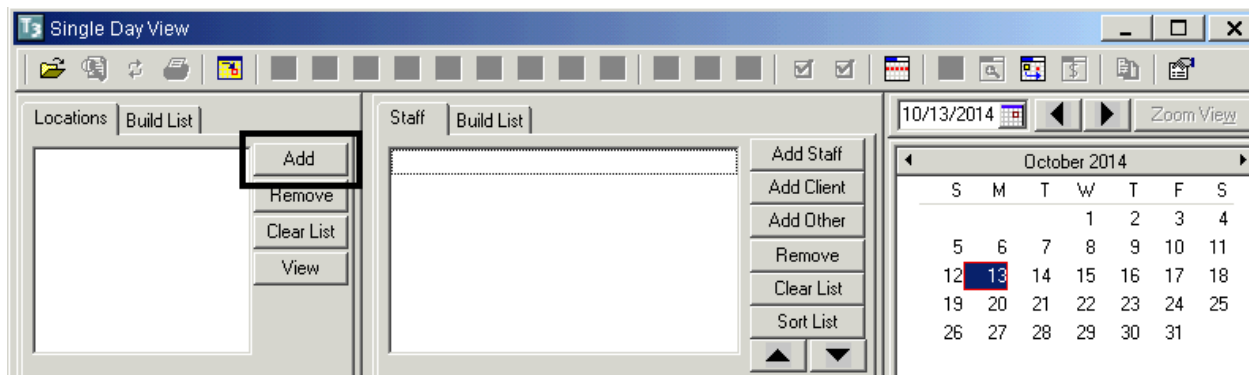
## SINGLE DAY VIEW

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

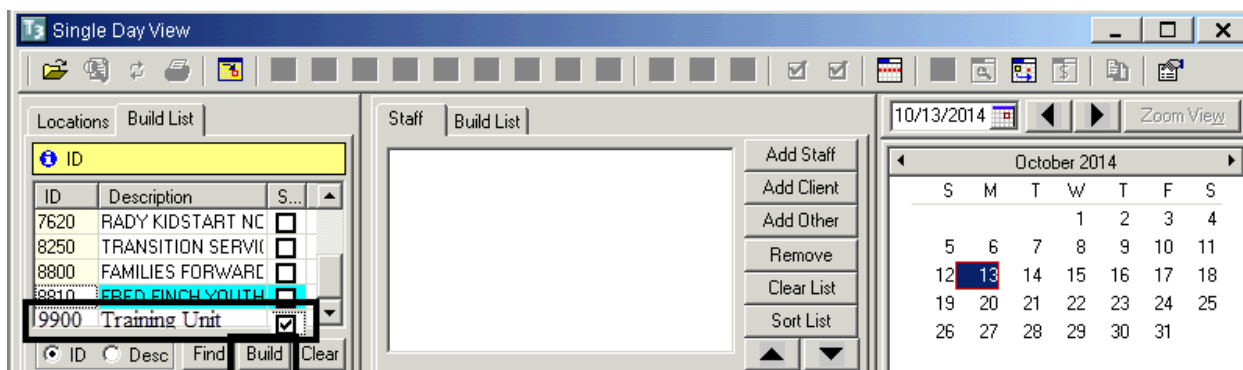
- Click the Scheduler menu, and click "Scheduler Maintenance- Single-Day"



- Click "Add"

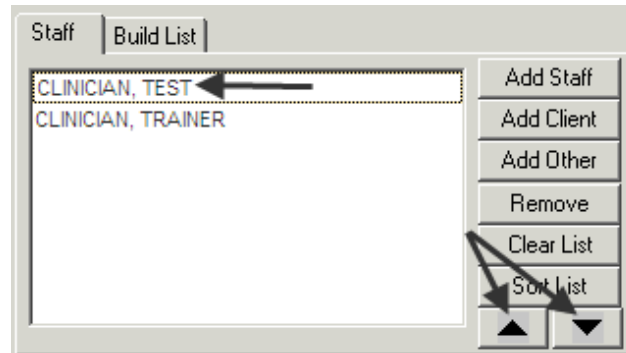


- Check the box next to the location you wish to view, and click "Build"





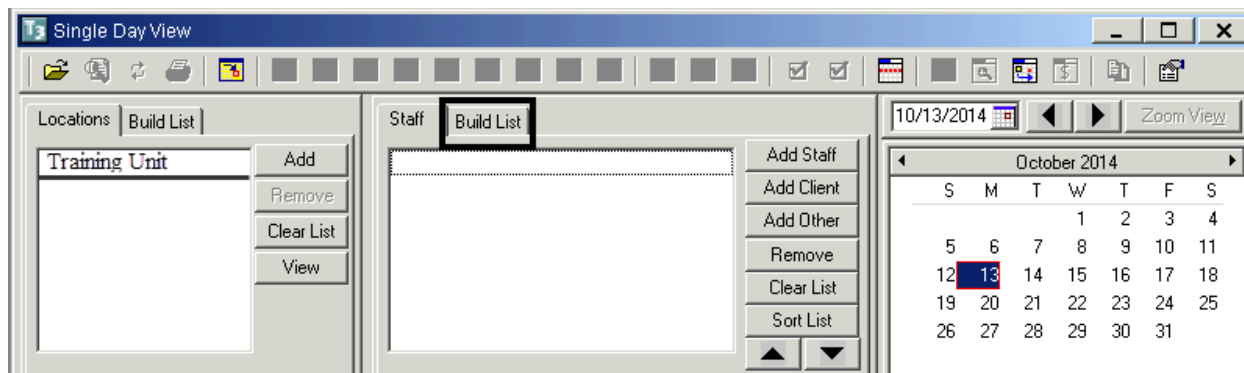
- Staff names can be moved up and down, which corresponds to left and right in the grid below. To move a particular staff name to the left, click the staff name and click the up arrow. To move a particular staff name to the right, click the staff name and click the down arrow



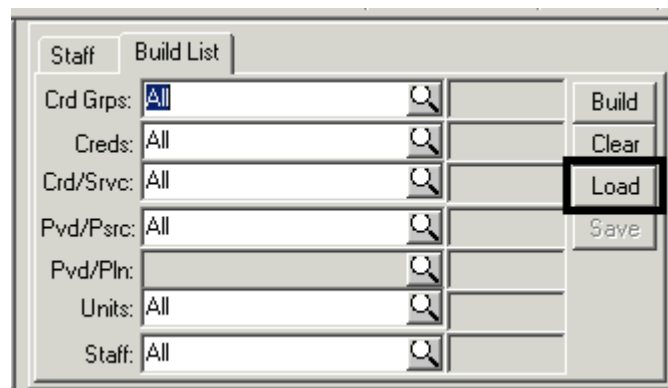


## CREDENTIAL FILTERS

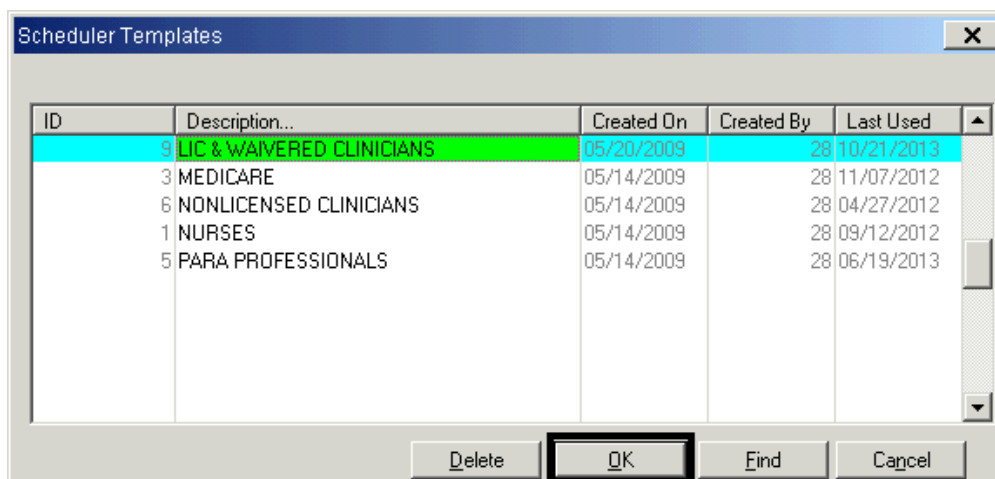
- To view staff members schedules based on credentials, click “Build List”



- Click “Load”.



- Click the desired credentials and click “OK”

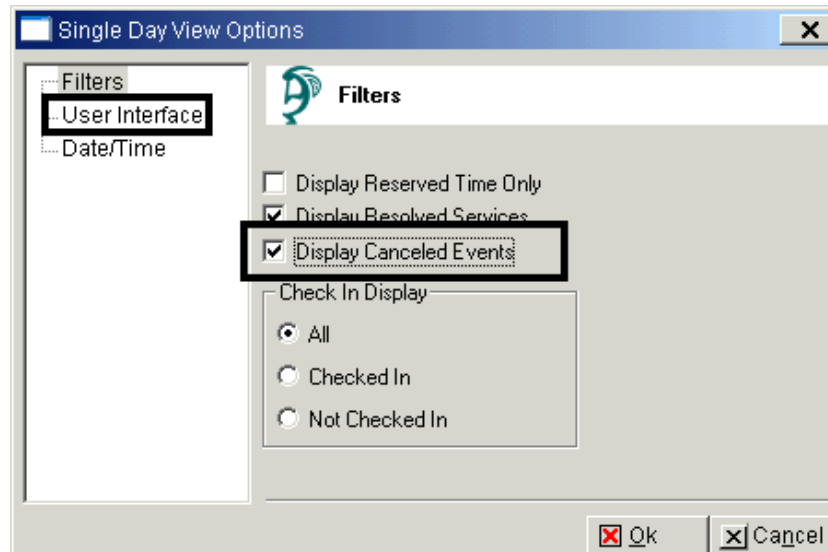


## VIEW OPTIONS

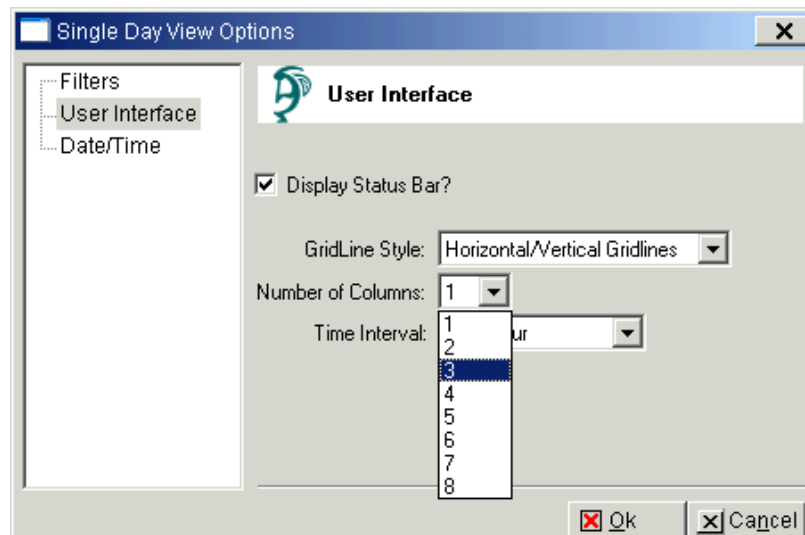
- Click the View Options icon



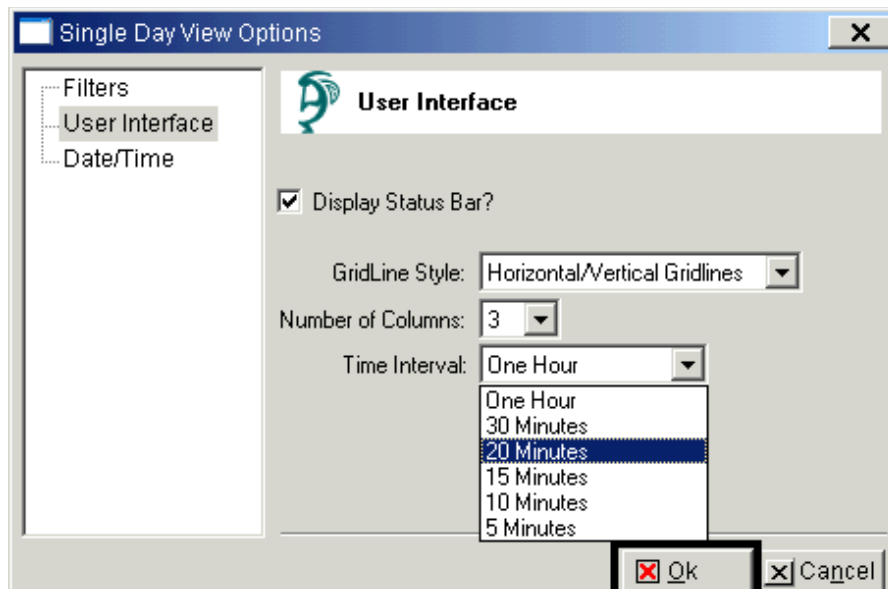
- Check the box next to “Display Cancelled Events”, and click “User Interface”



- For the “Number of Columns”, choose the desired number of staff you wish to view



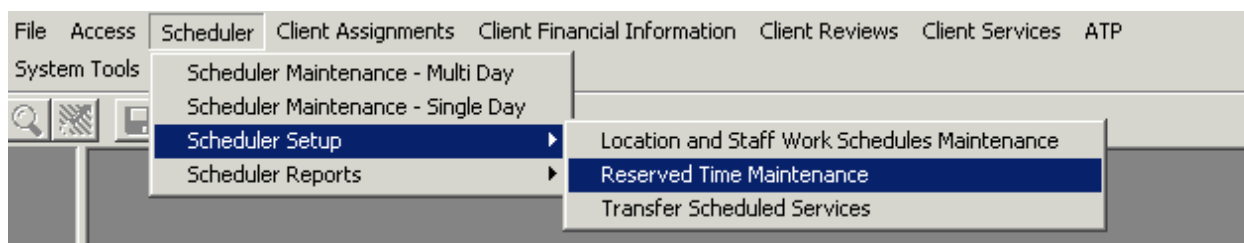
- For the “Time Interval” choose the interval that represents the shortest service event your program offers (i.e. the program does not schedule services less than 20 minutes in length). Click “OK”



## 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

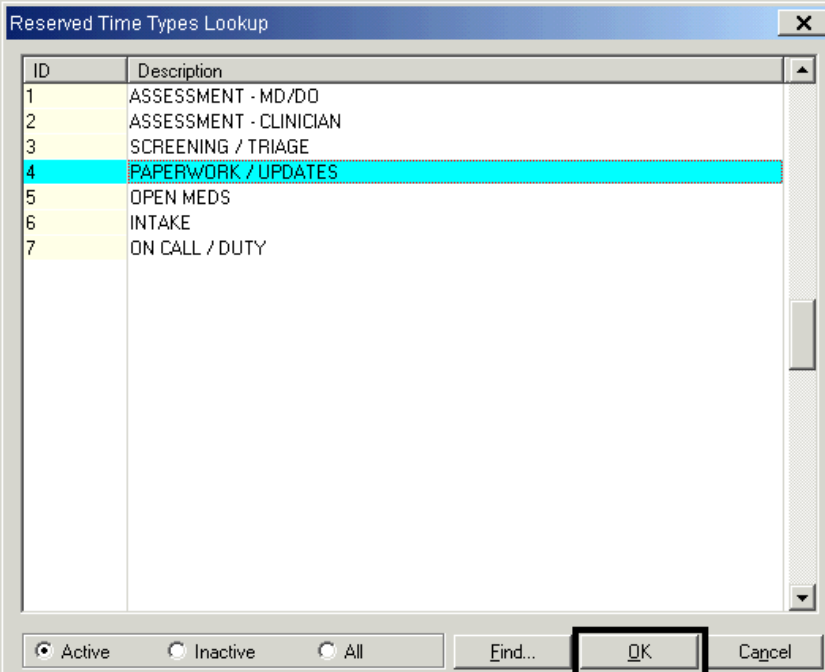
 A screenshot of the 'Reserved Time Maintenance (Administrative Access)' window. It features filter fields for 'Reserved Time Types' (set to 'PAPERWORK / UPDATES' with a count of 4), 'Staff' (set to 'CLINICAL, STAFF'), and 'Locations' (set to 'All'). There are date pickers for 'Dates' (10/13/2014) and 'Thru' (10/30/2014), and a 'Clear' button. A yellow bar at the bottom contains a 'Date' label.

- To enter reserve time, click in the first open date cell, enter the date, and click the magnifying glass in the “Reserved” column

 A screenshot of the 'Reserved Time Maintenance (Administrative Access)' window, showing the data table below the filters. The table has columns: Date, Reserved, Staff, Location, Start, and End. The first row shows the date '10/23/2014' in the 'Date' column, and a magnifying glass icon in the 'Reserved' column, which is circled in red.
 

Date	Reserved	Staff	Location	Start	End
10/23/2014					

- Click the desired reserve time type, and click “OK”

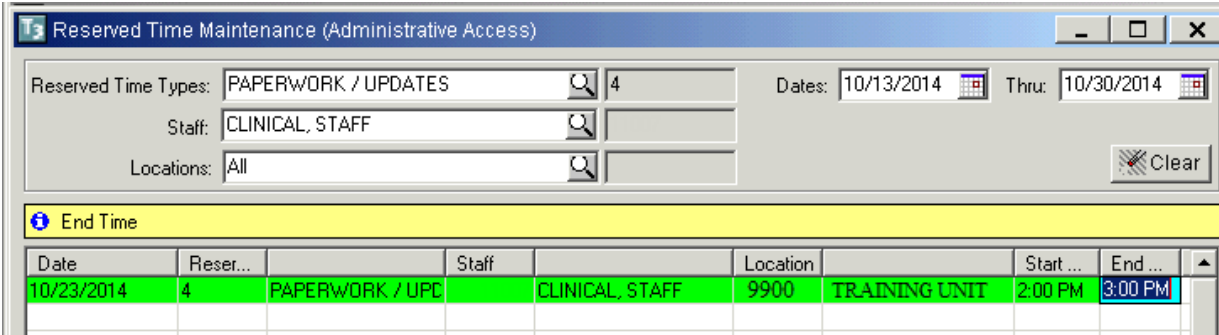


The dialog box titled "Reserved Time Types Lookup" contains a table with the following data:

ID	Description
1	ASSESSMENT - MD/DO
2	ASSESSMENT - CLINICIAN
3	SCREENING / TRIAGE
4	PAPERWORK / UPDATES
5	OPEN MEDS
6	INTAKE
7	ON CALL / DUTY

At the bottom, there are radio buttons for "Active", "Inactive", and "All", and buttons for "Find...", "OK", and "Cancel". The "OK" button is highlighted with a black border.

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



The "Reserved Time Maintenance (Administrative Access)" window shows the following fields and values:

- Reserved Time Types: PAPERWORK / UPDATES
- Staff: CLINICAL, STAFF
- Locations: All
- Dates: 10/13/2014 Thru: 10/30/2014
- Clear button

Below the fields is a table with the following data:

Date	Reser...	Staff	Location	Start ...	End ...
10/23/2014	4	PAPERWORK / UPC	CLINICAL, STAFF	9900	TRAINING UNIT



## **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



- Enter the desired information and click “Find”

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

## 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



- Enter the desired information and click “Find”. NOTE: Leave “Reserved Type” blank

A screenshot of the 'Find Open Time Slot' dialog box. The title bar reads 'Find Open Time Slot'. Inside the dialog, there is a logo on the left and the text 'Find Open Time Slot' on the right. Below this, there are several input fields: 'Staff:' with the text 'CLINICAL, STAFF', 'Reserved Type:' which is empty, and 'Start Date:' with the date '10/30/2014'. Below these fields is a 'Find' button with a dropdown menu showing 'Next', and a 'One Hour' dropdown menu followed by the text 'time slot'. At the bottom of the dialog, there are three buttons: 'Find' (with a magnifying glass icon), 'Clear' (with a trash can icon), and 'Cancel' (with an 'X' icon). The 'Find' button is highlighted with a black border.

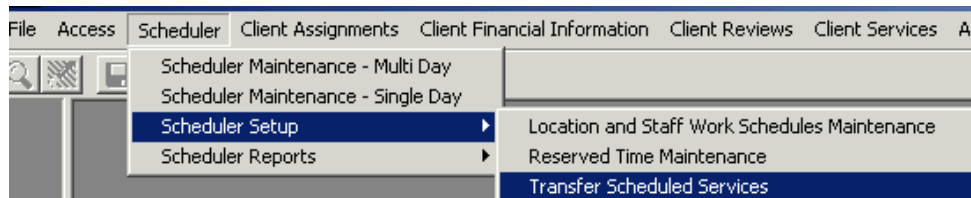
- The date on the single day view calendar changes accordingly; however, the actual time slot is not automatically selected



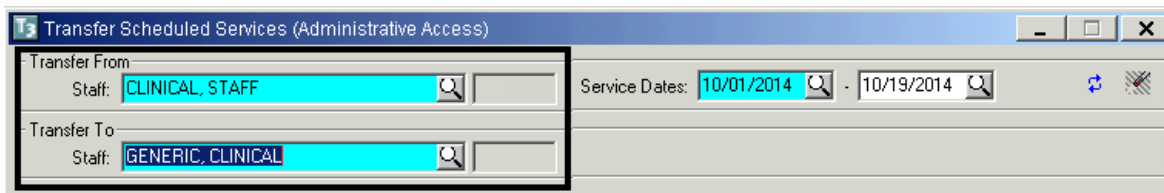
## TRANSFERRING SCHEDULED SERVICES

The “Transfer Scheduled Services” utility transfers selected services from one staff’s schedule to another.

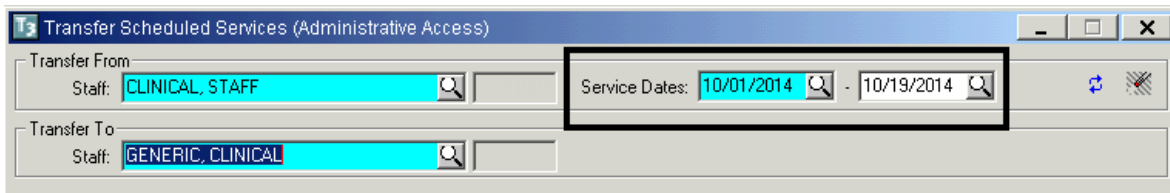
- Click the “Scheduler” menu, “Scheduler Setup”, and “Transfer Scheduled Services”



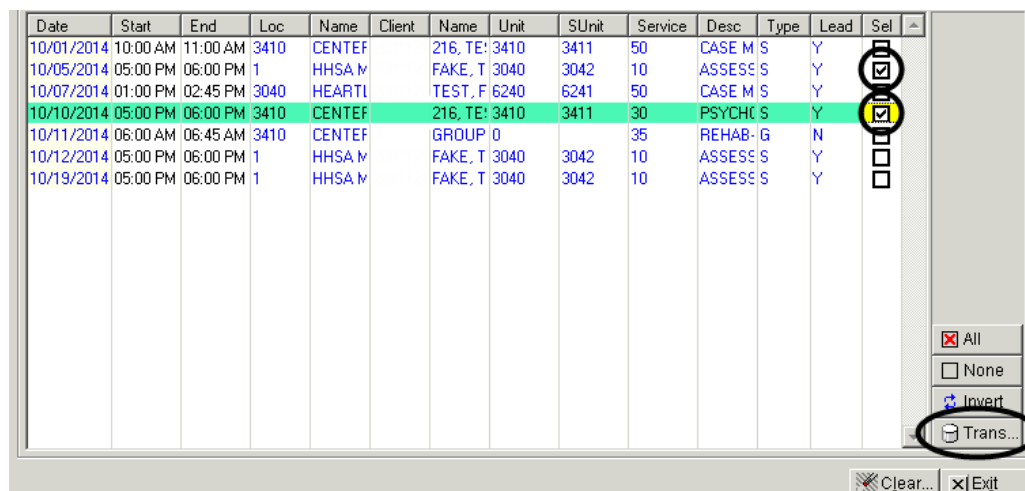
- Enter the desired staff in the fields on the left



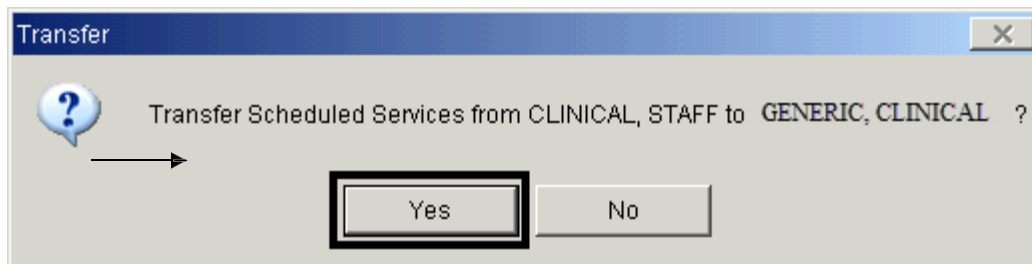
- Enter the service dates in the fields on the right



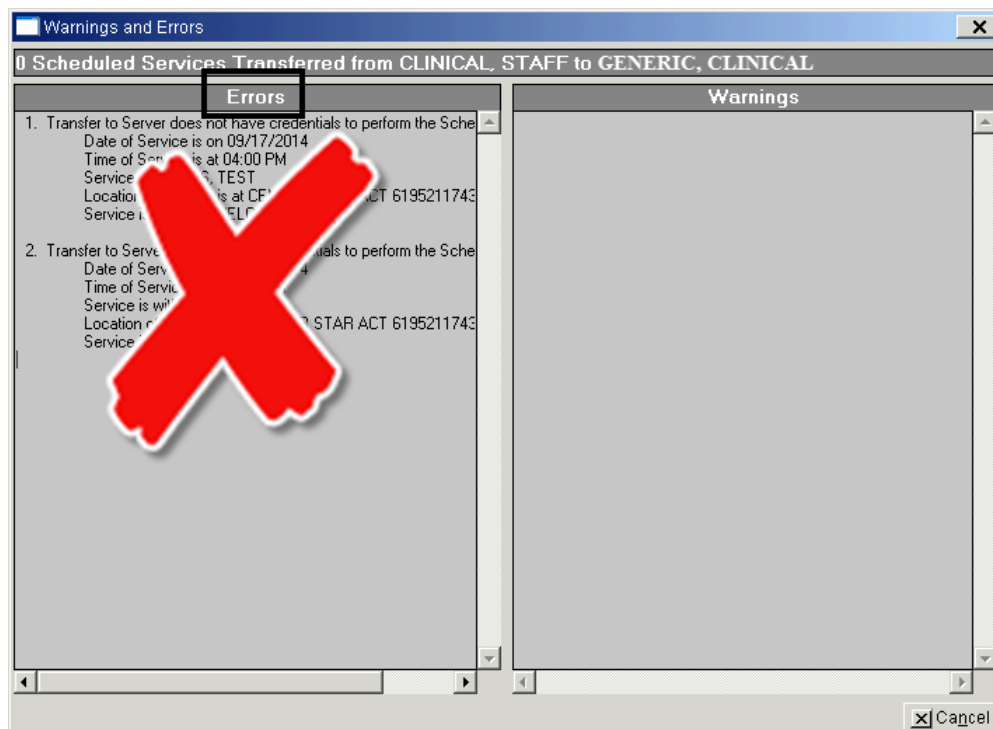
- Check the box(es) next to the services you wish to transfer and Click “Transfer”



- The “Transfer” dialog box appears. Click “Yes”

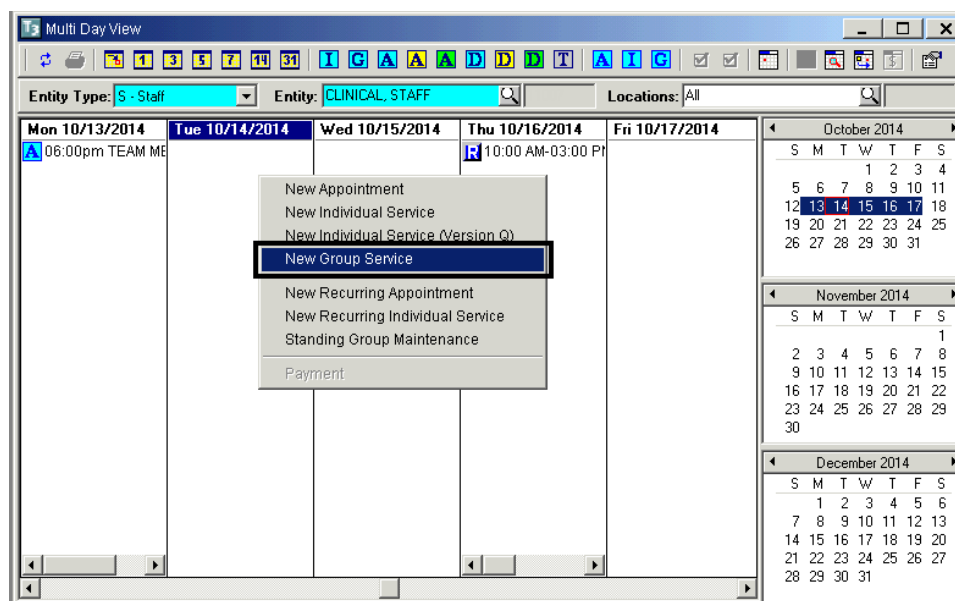


- The “Warnings and Errors” dialog box appears. Click “Cancel”. NOTE: “Errors” will not transfer, but “Warnings” will



## NEW GROUP SERVICE EVENT

- Right click in the column of the day to be scheduled. Click “New Group Service” from the drop down menu



- 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

- 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”

- Enter the “Unit” and the “Location” field automatically fills. Enter the “SubUnit”

- Enter any comments regarding the group in the “Comments” field, and click “Save”. The lower containers activate

- 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, STAFF  
 Service:   
 Start: 2:00 PM Duration: 1:45 Stop: 3:45 PM  
☐ Lead Staff during Time Period?  
 Supervisor: 0

Service Codes Lookup

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

☒ Active ☐ Inactive ☐ All Find... OK Cancel

- 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  
 Prov. At: School  
 Out. Fac: MASON ELEMENTARY-SD  
 Con. Type: Face to Face  
 App. Type: Scheduled  
 Bill. Type: Not Applicable  
 Int. Type: NOT APPLICABLE

Start/Dur/Stop  
 2:00 PM  
 1:45  
 3:45 PM  
 EBP/SS  
☐

- 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

Staff: CLINICAL, STAFF  
 Service: REHAB-GROUP 35  
 Start: 2:00 PM Duration: 1:45 Stop: 3:45 PM  
☒ Lead Staff during Time Period?  
 Supervisor: 0  
**Save**

- Add clients and click “Save”

**Servers**

Staff	Service	Start Time	End Time	Lead
CLINICAL, STAFF	35	02:00 PM	03:45 PM	<input checked="" type="checkbox"/>

**Clients**

Client	Pr...	Start Time	End Time	C...	Cxl
--------	-------	------------	----------	------	-----

Client: FAKE, TEST  
 Unit: TRAINING UNIT  
 SUnit: TRAINING SUBUNIT  
 Transportation Required: ☐  
 Prov. To: Client  
 Prov. At: School  
 Out. Fac: MASON ELEMENTARY-SD  
 Con. Type: Face to Face  
 App. Type: Scheduled  
 Bill. Type: Not Applicable  
 Int. Type: NOT APPLICABLE  
 Start/Dur/Stop: 2:00 PM, 1:45, 3:45 PM  
 EBP/SS: ☐  
**Save**

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

**Clients**

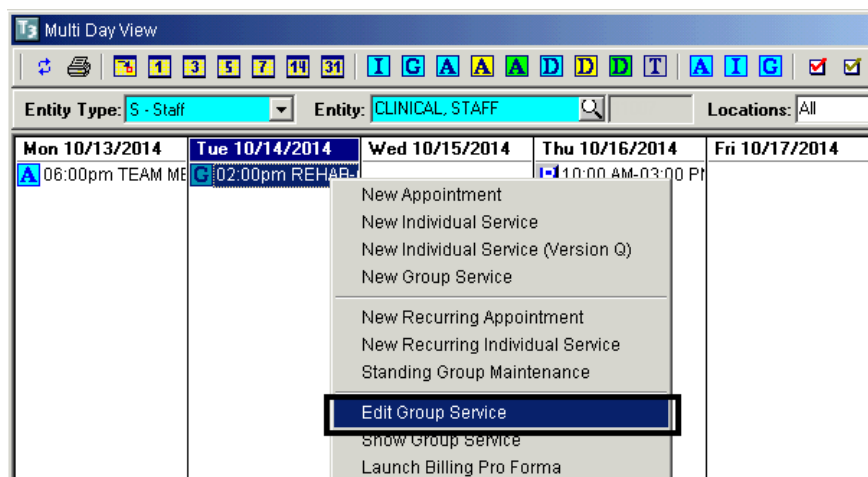
Client	Pr...	Start Time	End Time	C...	Cxl
FAKE, TEST	0.00	02:00 PM	03:45 PM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Client: 0  
 Unit: TRAINING UNIT  
 SUnit: TRAINING SUBUNIT  
 Transportation Required: ☐  
 Prov. To: Client  
 Prov. At: Office  
 Out. Fac: 0  
 Con. Type: Face to Face  
 App. Type: Scheduled  
 Bill. Type: Not Applicable  
 Int. Type: NOT APPLICABLE  
 Start/Dur/Stop: 2:00 PM, 1:45, 3:45 PM  
 EBP/SS: ☐  
**Exit**

Resolve Group Cancel Group Post Group Billing Pro Forma Event Log Print Payment

## 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”

The screenshot shows the 'Add/Edit Group Service Scheduled for CLINICAL, STAFF (Full Access)' dialog box. The 'Event' tab is selected, showing a yellow banner that says 'This Normal Event is Scheduled for Today.' Below this, the 'Subject' is 'REHAB-GROUP 35'. The 'Date' is '10/14/2014', 'Start Time' is '2:00 PM', 'Duration' is '2:00', and 'Stop Time' is '4:00 PM'. The 'Unit' is 'TRAINING UNIT' (9900), 'Sub Unit' is 'TRAINING SUBUNIT' (9901), and 'Location' is 'TRAINING LOCATION' (1). A 'Comment' field contains the text: 'GROUP WILL EDUCATE CLIENTS ON HOW TO ESTABLISH AND MAINTAIN A MEDICATION CALENDAR.' On the right side, there are 'Save', 'Delete', and 'Clear' buttons.

- Make any appropriate change(s) to the “Server” container and click “Save”

The screenshot shows the 'Servers' container with two tabs: 'Scheduled' and 'Actual'. The 'Scheduled' tab is active, displaying a table of scheduled events. The table has columns for Staff, Service, Start Time, End Time, and Lead. The first row shows 'CLINICAL, STAFF' for service '35' from '02:00 PM' to '03:45 PM' with a checked 'Lead' box. To the right of the table is a configuration panel with fields for Staff (CLINICAL, STAFF), Service (REHAB-GROUP 35), Start (2:00 PM), Duration (2:00), Stop (4:00 PM), a checked 'Lead Staff during Time Period?' box, and a Supervisor field (0). At the bottom of the configuration panel are 'Add', 'Save' (highlighted with a black border), and 'Delete' buttons.

- 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”

- 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

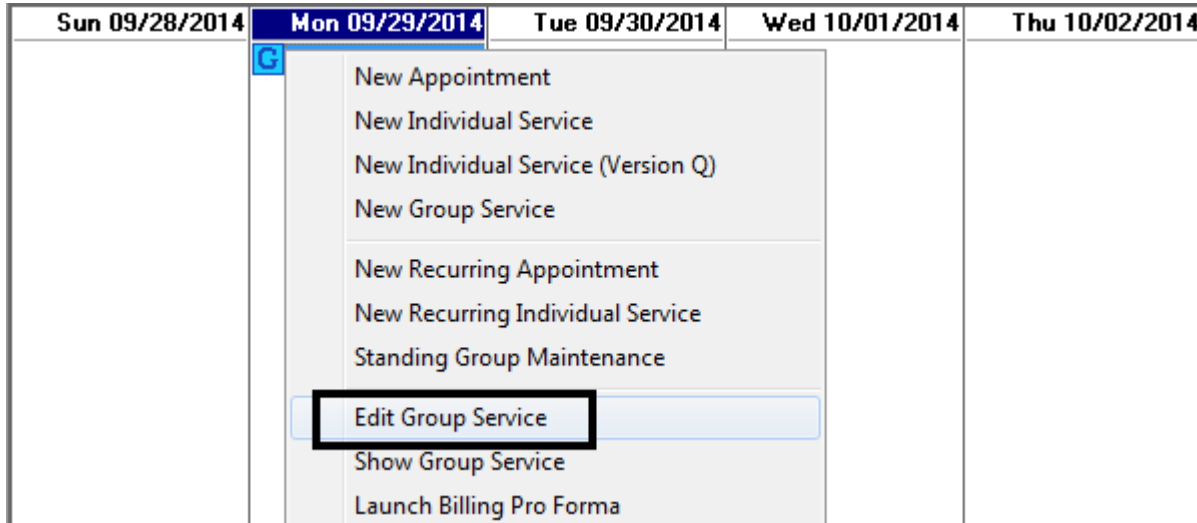
- If no other changes are required, select “Exit”

**NOTE:** A scheduled group service cannot be edited to become a “Standing Group”



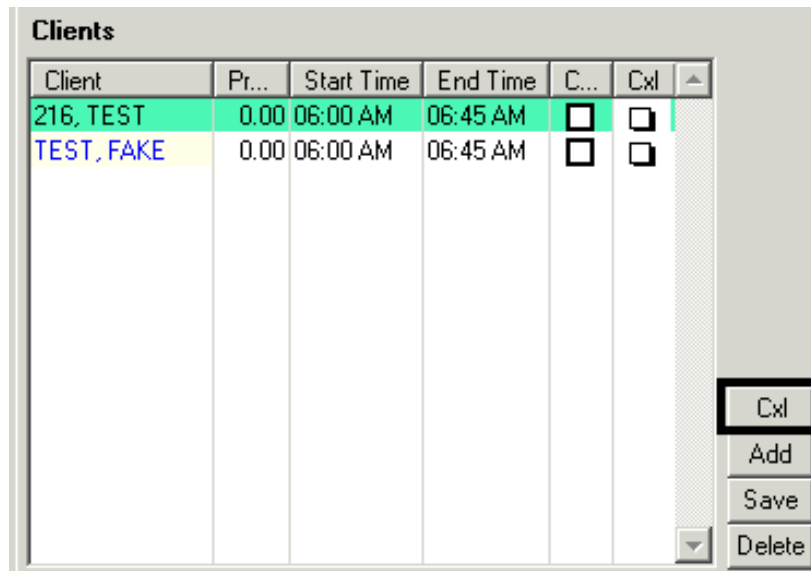
## CANCELLING ONE CLIENT IN A GROUP

- Right click on the group event, and click “Edit Group Service”

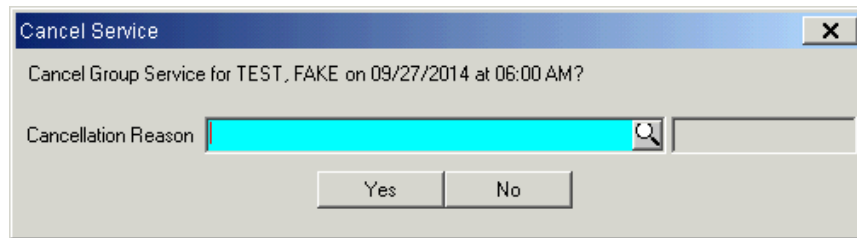


*NOTE: If “Cancel” is selected from the drop down menu instead of “Edit Group Service”, there is a risk of cancelling the entire group*

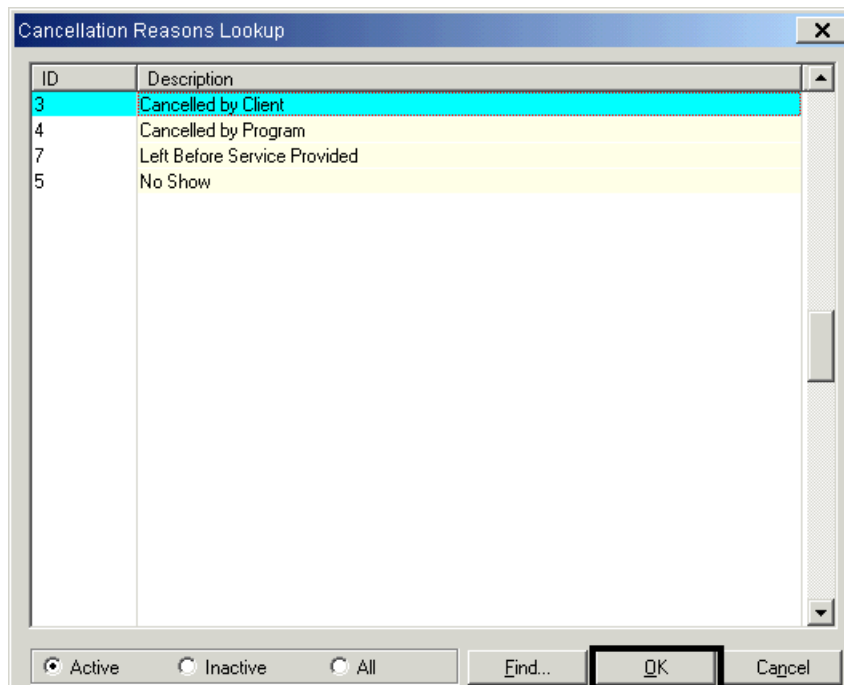
- The service screen appears. Click on the client you wish to cancel so that it is highlighted, and click “Cxl”



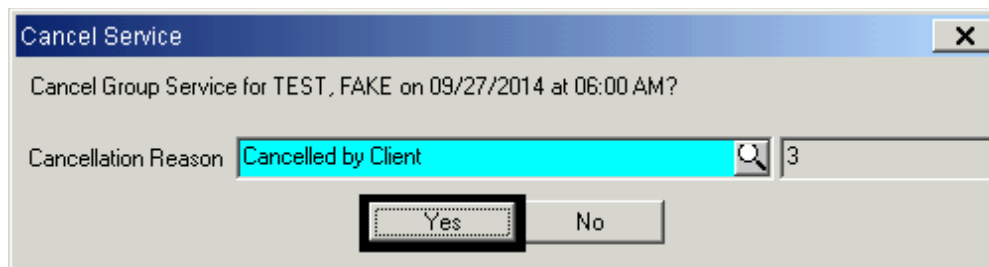
- The “Cancel Service” dialog box appears. Click the magnifying glass to access the “Cancellation Reason” table



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



- Click "Yes" to confirm the cancellation



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

Client	Pr...	Start Time	End Time	C...	Cxl
216, TEST	0.00	06:00 AM	06:45 AM	<input type="checkbox"/>	<input type="checkbox"/>
TEST, FAKE	0.00	06:00 AM	06:45 AM	<input type="checkbox"/>	<input checked="" type="checkbox"/>

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

Client	Pr...	Start Time	End Time	C...	Cxl
216, TEST	0.00	06:00 AM	06:45 AM	<input type="checkbox"/>	<input type="checkbox"/>
TEST, FAKE	0.00	06:00 AM	06:45 AM	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Client: TEST, FAKE

Unit: TRAINING UNIT 9900

SUnit: TRAINING SUBUNIT 9901

☐ Transportation Required

Prov. To: Client and Family B

Prov. At: Other Community/Field Unspec 0

Out. Fac: 0

Con. Type: Face to Face F

App. Type: Cancelled by Client 3

Bill. Type: Not Applicable X

Int. Type: NOT APPLICABLE N

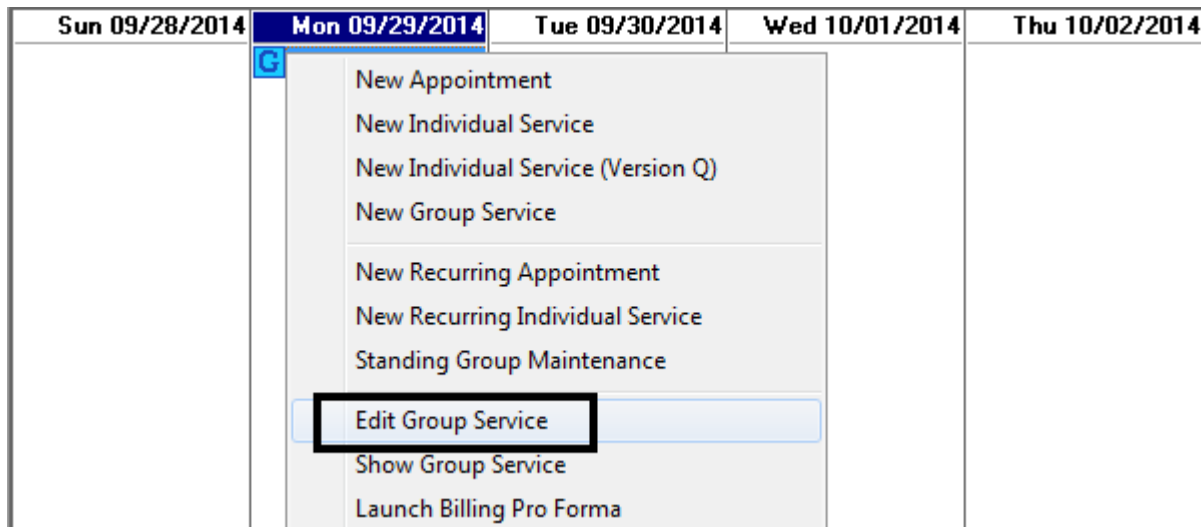
Start/Dur/Stop: 6:00 AM 0:45 6:45 AM

EBP/SS: ☐

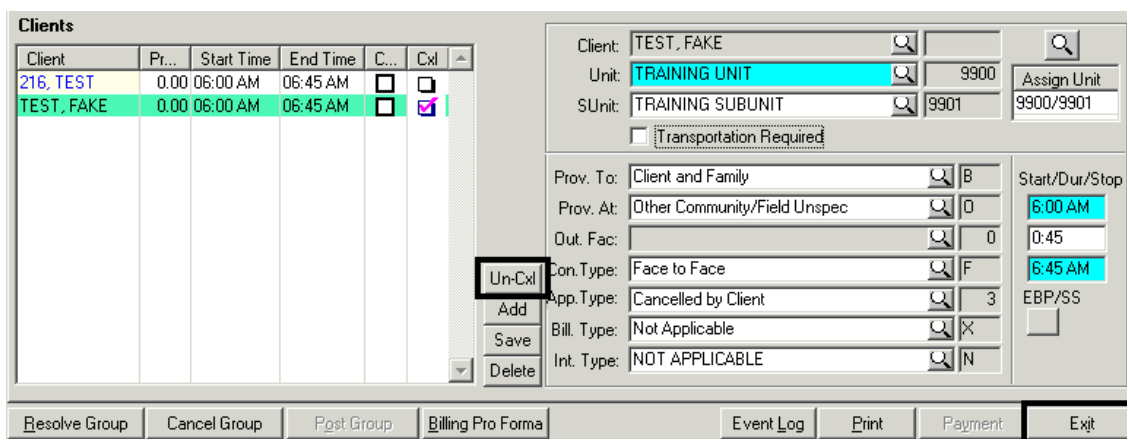
## UNCANCELLING ONE CLIENT IN A GROUP

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

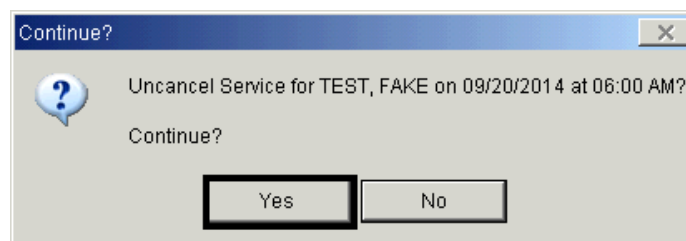
- Right click on the group event, and click “Edit Group Service” from the drop down menu



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



- 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

Client	Pr...	Start Time	End Time	C...	Cxl
216, TEST	0.00	06:00 AM	06:45 AM	<input type="checkbox"/>	<input type="checkbox"/>
TEST, FAKE	0.00	06:00 AM	06:45 AM	<input type="checkbox"/>	<input type="checkbox"/>

Client: TEST, FAKE

Unit: TRAINING UNIT 9900 Assign Unit 9900/9901

SUnit: TRAINING SUBUNIT 9901

☐ Transportation Required

Prov. To: Client and Family B

Prov. At: Other Community/Field Unspec 0

Out. Fac: 0

Con. Type: Face to Face F

App. Type: Scheduled 1

Bill. Type: Not Applicable X

Int. Type: NOT APPLICABLE N

Start/Dur/Stop: 6:00 AM 0:45 6:45 AM

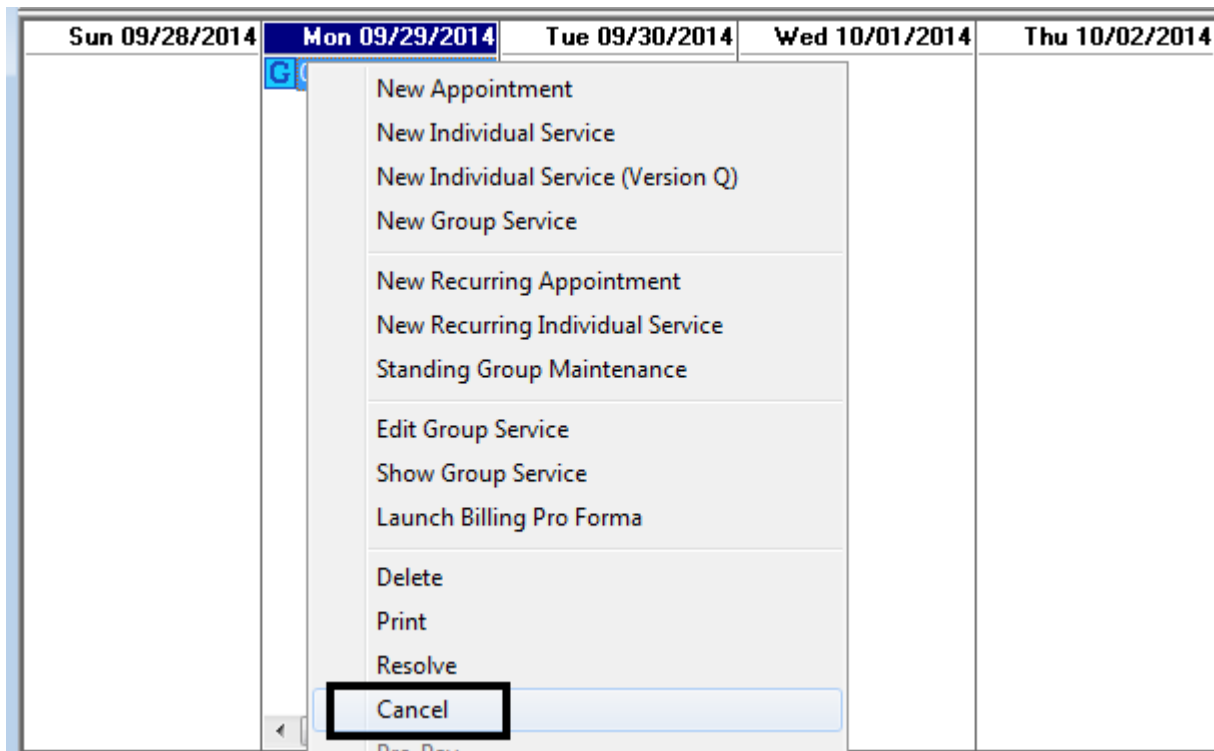
EBP/SS: ☐

Cxl Add Save Delete

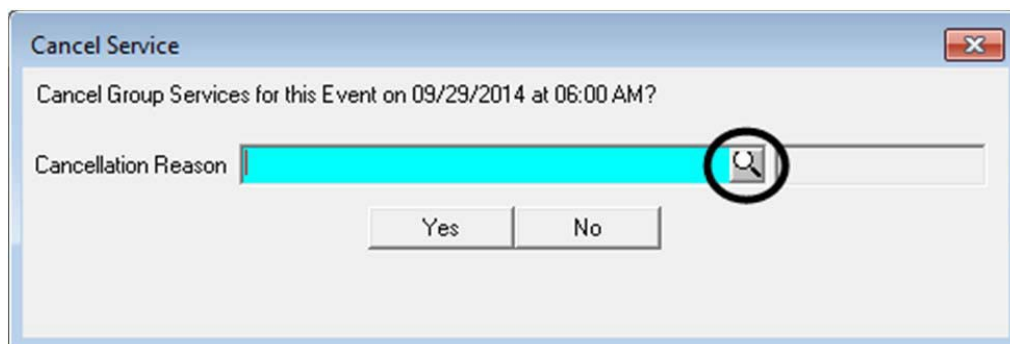
Resolve Group Cancel Group Post Group Billing Pro Forma Event Log Print Payment Exit

## **CANCELLING THE ENTIRE GROUP SERVICE EVENT**

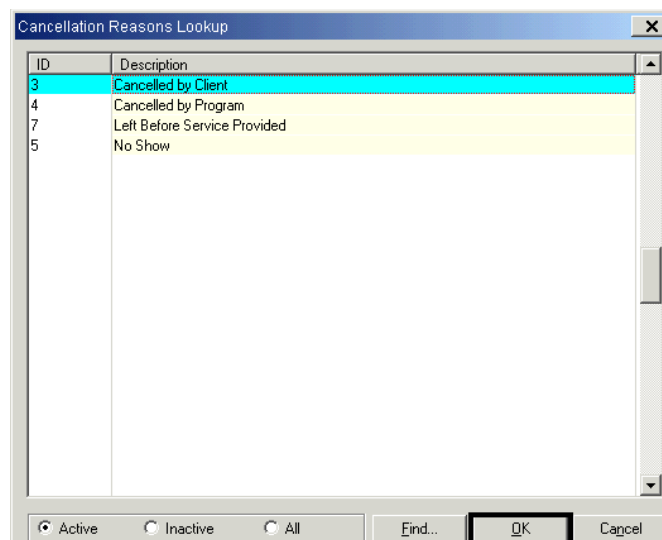
- Right click on the group service you wish to cancel, and click “Cancel” from the drop down menu



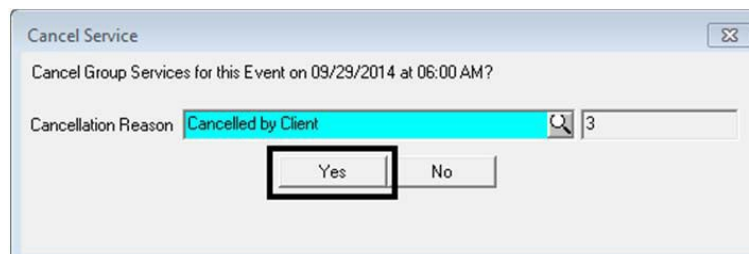
- The service screen and the “Cancel Service” dialog box appear. Click the magnifying glass to access the “Cancellation Reason” table



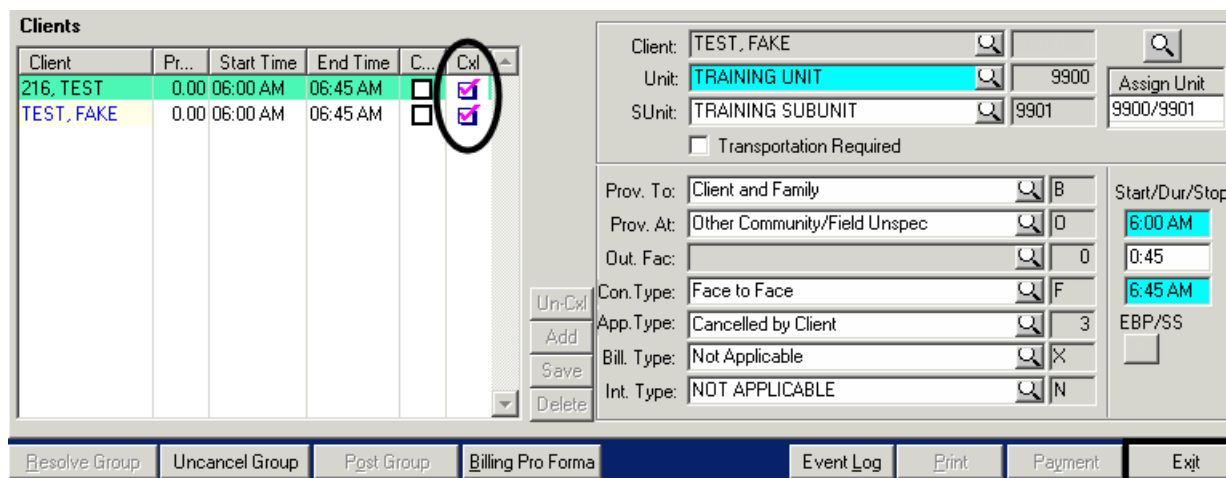
- Click on the appropriate “Cancellation Reason” and click “OK”



- Click “Yes” to confirm the cancellation



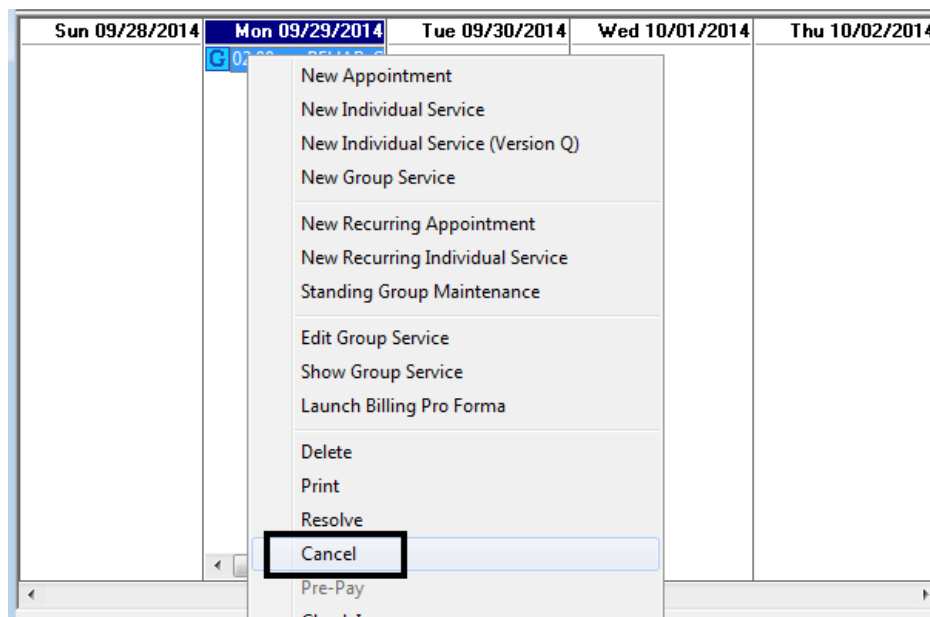
- In the “Client” container, pink checkmarks appear in the “Cxl” column next to each client’s name. Click “Exit” to return to Scheduler Maintenance- Multi Day. The service event is removed from the calendar



## 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



- 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					
Client	Pr...	Start Time	End Time	C...	Cxl
216, TEST	0.00	06:00 AM	06:45 AM	<input type="checkbox"/>	<input type="checkbox"/>
TEST, FAKE	0.00	06:00 AM	06:45 AM	<input type="checkbox"/>	<input type="checkbox"/>

Client: TEST, FAKE

Unit: TRAINING UNIT 9900

SUnit: TRAINING SUBUNIT 9901

☐ Transportation Required

Prov. To: Client and Family

Prov. At: Other Community/Field Unspec

Out. Fac:

Con.Type: Face to Face

App.Type: Scheduled

Bill. Type: Not Applicable

Int. Type: NOT APPLICABLE

Start/Dur/Stop

6:00 AM

0:45

6:45 AM

EBP/SS

Cxl Add Save Delete

Resolve Group

Cancel Group

Post Group

Billing Pro Forma

Event Log


Print

Payment

Exit

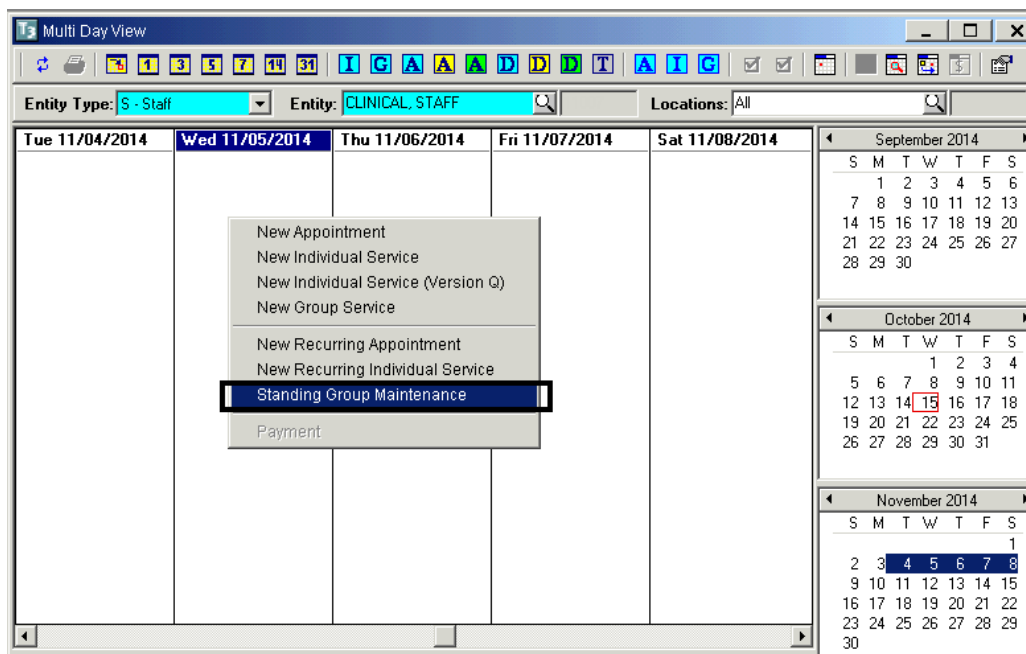


- The service event appears on the schedule with the pink X removed, which indicates that the service has been uncanceled

Sun 09/28/2014	Mon 09/29/2014	Tue 09/30/2014	Wed 10/01/2014
	 08:00am REHAB-G		

## STANDING GROUP MAINTENANCE (NEW)

- Right click in the column of the day to be scheduled, and click “Standing Group Maintenance”



- An “Add/Edit Standing Group” screen appears

The screenshot shows the 'Add/Edit Standing Group (Administrative Access)' dialog box. It has two tabs: 'Main' and 'Schedule'. The 'Main' tab is selected. The form contains the following fields:
 

- ID: [text field]
- Description: [text field]
- Unit: [text field]
- SubUnit: [text field]
- Location: [text field]
- Slots: [text field] with the value '0'
- Comments: [text area]

 At the bottom of the dialog are five buttons: 'Save', 'Clear', 'Delete', 'Rules of Recurrence', and '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 Standing Group (Administrative Access)

Main | Schedule

ID: 9900ART Description:

Unit: SubUnit: Location: Slots: 0

Comments:

Save Clear Delete

Rules of Recurrence Cancel

- 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 Standing Group (Administrative Access)

Main | Schedule

ID: 9900ART Description: 9900 ART THERAPY CLASS

Unit: TRAINING UNIT 9900

SubUnit: TRAINING SUBUNIT 9901

Location: TRAINING LOCATION

Slots: 10

Comments:

Save Clear Delete

Rules of Recurrence Cancel

- Click “Rules of Recurrence”

Dialog box: Add/Edit Standing Group (Administrative Access)

Tab: Main | Schedule

ID: 9900ART Description: 9900 ART THERAPY CLASS

Unit: TRAINING UNIT 9900

SubUnit: TRAINING SUBUNIT 9901

Location: TRAINING LOCATION 1

Slots: 10

Comments:

Buttons: Save, Clear, Delete

Rules of Recurrence (highlighted)

Cancel

- Complete the prompts by entering the appropriate information, and click “Build”.

Dialog box: Rules of Recurrence

Start Time: 4:00 PM Duration: 2:00 End Time: 6:00 PM

☐ Daily  
☒ Weekly  
☐ Monthly

Recur Every 1 week(s) on:

☐ Sunday ☐ Monday ☐ Tuesday ☒ Wednesday  
☐ Thursday ☐ Friday ☐ Saturday

Start Date: 11/05/2014

☒ End After 3 Occurrences  
☐ End By / /

Build (highlighted) Clear Cancel

**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”

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

- The “Schedule” tab on the “Add/Edit Standing Group” window activates

Add/Edit Standing Group (Administrative Access)

Main Schedule

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	<input type="checkbox"/>
11/12/2014	WEDNESDAY	04:00 PM	06:00 PM	10	<input type="checkbox"/>
11/19/2014	WEDNESDAY	04:00 PM	06:00 PM	10	<input type="checkbox"/>

☒ Unresolved Only ☐ All Copy Date: Add Group Edit Group  
 Copy for Paste Select All for Paste Paste from Copy Delete Selected Deselect All  
 Rules of Recurrence Cancel

- 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”

Add/Edit Standing Group (Administrative Access)

Main Schedule

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	<input checked="" type="checkbox"/>
11/12/2014	WEDNESDAY	04:00 PM	06:00 PM	10	<input type="checkbox"/>
11/19/2014	WEDNESDAY	04:00 PM	06:00 PM	10	<input type="checkbox"/>

☒ Unresolved Only ☐ All Copy Date: Add Group Edit Group  
 Copy for Paste Select All for Paste Paste from Copy Delete Selected Deselect All  
 Rules of Recurrence Cancel

- The “Select All for Paste” button activates. Click “Select All for Paste”

Add/Edit Standing Group (Administrative Access)

Main Schedule

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	<input type="checkbox"/>
11/12/2014	WEDNESDAY	04:00 PM	06:00 PM	10	<input type="checkbox"/>
11/19/2014	WEDNESDAY	04:00 PM	06:00 PM	10	<input type="checkbox"/>

☒ Unresolved Only ☐ All Copy Date: 11/05/2014 Add Group Edit Group

Copy for Paste **Select All for Paste** Paste from Copy Delete Selected Deselect All

Rules of Recurrence Cancel

- The remaining check boxes in the “Select” column are automatically checked. The “Paste from Copy” button activates. Click “Paste from Copy”

Add/Edit Standing Group (Administrative Access)

Main Schedule

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	<input checked="" type="checkbox"/>
11/12/2014	WEDNESDAY	04:00 PM	06:00 PM	10	<input checked="" type="checkbox"/>
11/19/2014	WEDNESDAY	04:00 PM	06:00 PM	10	<input checked="" type="checkbox"/>

☒ Unresolved Only ☐ All Copy Date: 11/05/2014 Add Group Edit Group

Copy for Paste **Paste from Copy** Delete Selected Deselect All

Rules of Recurrence Cancel

- 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)

Add/Edit Standing Group (Administrative Access)

Main Schedule

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	<input type="checkbox"/>
11/12/2014	WEDNESDAY	04:00 PM	06:00 PM	8	<input type="checkbox"/>
11/19/2014	WEDNESDAY	04:00 PM	06:00 PM	8	<input type="checkbox"/>

☒ Unresolved Only
 ☐ All
 Copy Date:
 Add Group
 Edit Group

Copy for Paste
 Select All for Paste
 Paste from Copy
 Delete Selected
 Deselect All

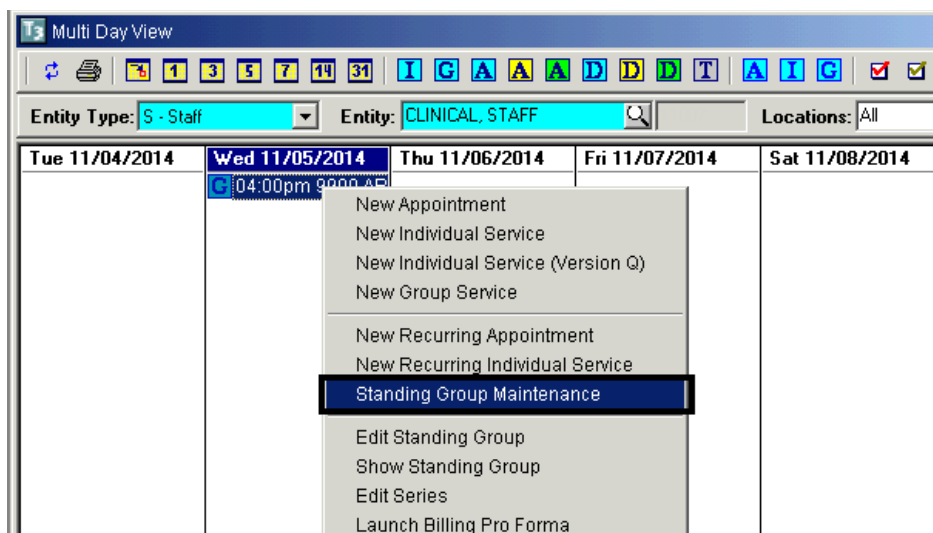
Rules of Recurrence
 Cancel



## **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



- 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 Standing Group (Administrative Access)

Main **Schedule**

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	<input type="checkbox"/>
11/12/2014	WEDNESDAY	04:00 PM	06:00 PM	8	<input type="checkbox"/>
11/19/2014	WEDNESDAY	04:00 PM	06:00 PM	10	<input type="checkbox"/>

☒ Unresolved Only ☐ All Copy Date: Add Group Edit Group

Copy for Paste Select All for Paste Paste from Copy Delete Selected Deselect All

**Rules of Recurrence** Cancel

- 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”

Rules of Recurrence

Start Time: 4:00 PM Duration: 2:00 End Time: 6:00 PM

☐ Daily ☒ Weekly ☐ Monthly

Recur Every 1 week(s) on:

☐ Sunday ☐ Monday ☐ Tuesday ☒ Wednesday  
☐ Thursday ☐ Friday ☐ Saturday

Start Date: 11/26/2014

☒ End After 2 Occurrences ☐ End By / /

**Build** Clear Cancel

Add/Edit Standing Group (Administrative Access)

Main **Schedule**

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	<input type="checkbox"/>
11/12/2014	WEDNESDAY	04:00 PM	06:00 PM	8	<input type="checkbox"/>
11/19/2014	WEDNESDAY	04:00 PM	06:00 PM	10	<input checked="" type="checkbox"/>
11/26/2014	WEDNESDAY	04:00 PM	06:00 PM	10	<input type="checkbox"/>
12/03/2014	WEDNESDAY	04:00 PM	06:00 PM	10	<input type="checkbox"/>

☒ Unresolved Only ☐ All Copy Date: Add Group Edit Group

**Copy for Paste** Select All for Paste Paste from Copy Delete Selected Deselect All

Rules of Recurrence Cancel

- 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”

Add/Edit Standing Group (Administrative Access)

Main Schedule

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	<input type="checkbox"/>
11/12/2014	WEDNESDAY	04:00 PM	06:00 PM	8	<input type="checkbox"/>
11/19/2014	WEDNESDAY	04:00 PM	06:00 PM	8	<input type="checkbox"/>
11/26/2014	WEDNESDAY	04:00 PM	06:00 PM	10	<input type="checkbox"/>
12/03/2014	WEDNESDAY	04:00 PM	06:00 PM	10	<input checked="" type="checkbox"/>

Unresolved Only All Copy Date: 11/19/2014 Add Group Edit Group

Copy for Paste Select All for Paste Paste from Copy Delete Selected Deselect All

Rules of Recurrence Cancel

- 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)

Add/Edit Standing Group (Administrative Access)

Main Schedule

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	<input type="checkbox"/>
11/12/2014	WEDNESDAY	04:00 PM	06:00 PM	8	<input type="checkbox"/>
11/19/2014	WEDNESDAY	04:00 PM	06:00 PM	8	<input type="checkbox"/>
11/26/2014	WEDNESDAY	04:00 PM	06:00 PM	8	<input type="checkbox"/>
12/03/2014	WEDNESDAY	04:00 PM	06:00 PM	8	<input type="checkbox"/>

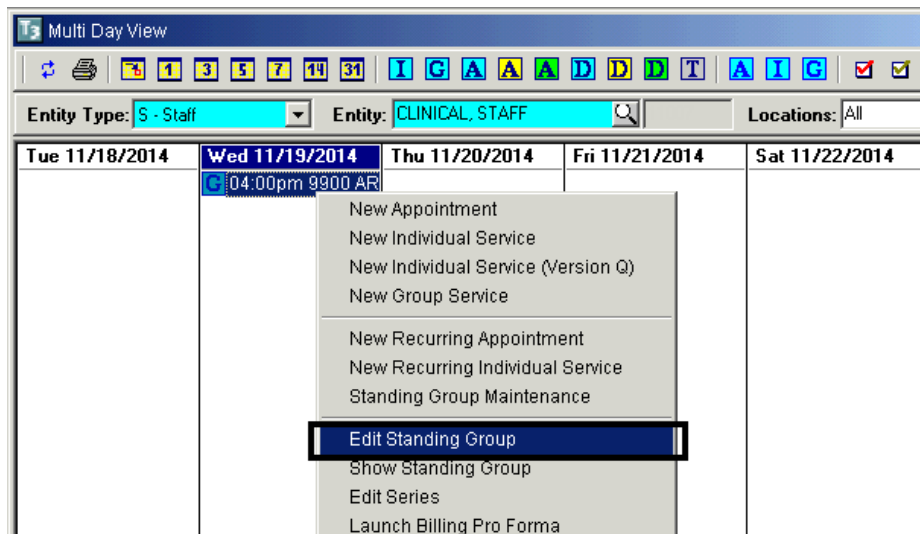
Unresolved Only All Copy Date: Add Group Edit Group

Copy for Paste Select All for Paste Paste from Copy Delete Selected Deselect All

Rules of Recurrence Cancel

## EDIT ONE GROUP SERVICE EVENT

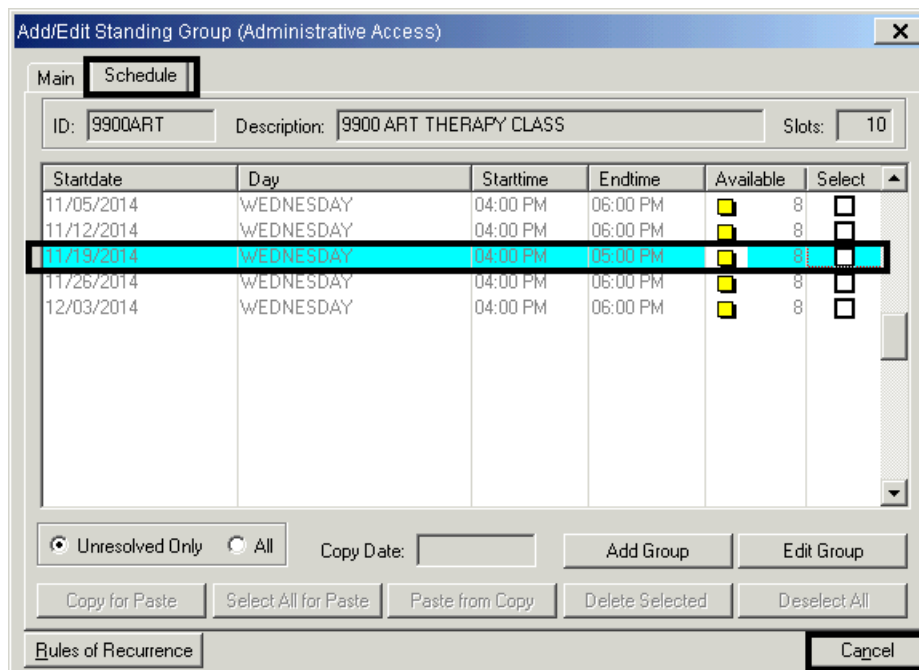
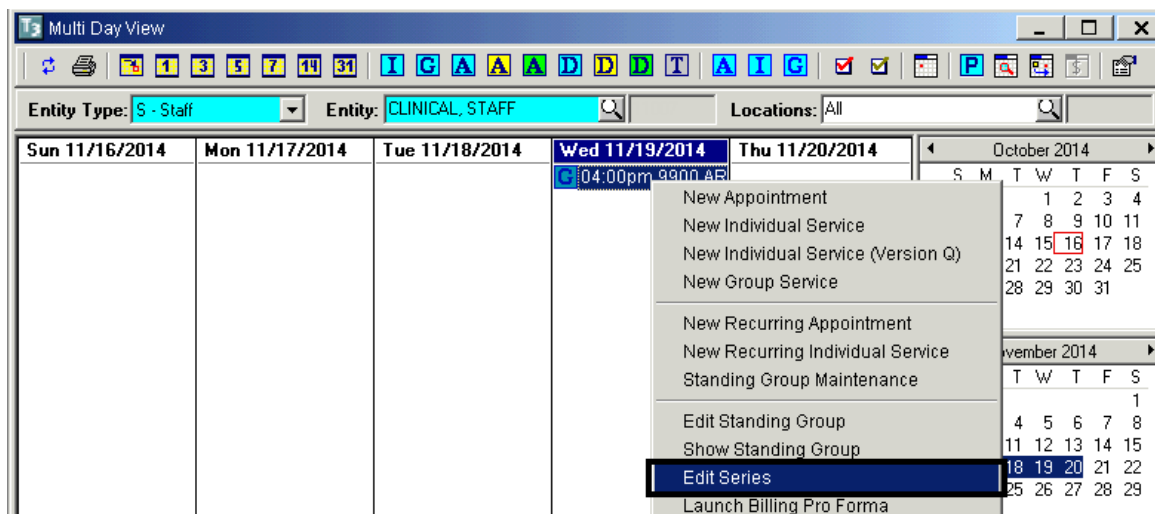
- Right click on the Standing Group in the staff person's schedule, and click "Edit Standing Group"



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

The screenshot shows the 'Add/Edit Group Service Scheduled for CLINICAL, STAFF (Full Access)' window. The 'Event' tab is active, showing a yellow banner: 'This Recurring Event will Occur in the Future. Standing Group ID: 9900ART'. The 'Subject' is '9900 ART THERAPY CLASS'. The 'Date' is '11/19/2014', 'Start Time' is '4:00 PM', 'Duration' is '1:00', and 'Stop Time' is '5:00 PM'. The 'Unit' is 'TRAINING UNIT', 'Sub Unit' is 'TRAINING SUBUNIT', and 'Location' is 'HHSA MH BILLING UNIT'. The 'Staff' is 'CLINICAL, STAFF'. A dialog box titled 'Update Attendee and Calendar Records?' is open, with the option 'Update all attendee and calendar records with new event time' selected. The 'Proceed with Save' button is highlighted. The 'Clients' tab is also visible, showing a list of clients with their start and stop times. The bottom of the window has buttons for 'Resolve Group', 'Cancel Group', 'Post Group', 'Billing Pro Forma', 'Event Log', 'Print', 'Payment', and 'Exit'.

- 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”

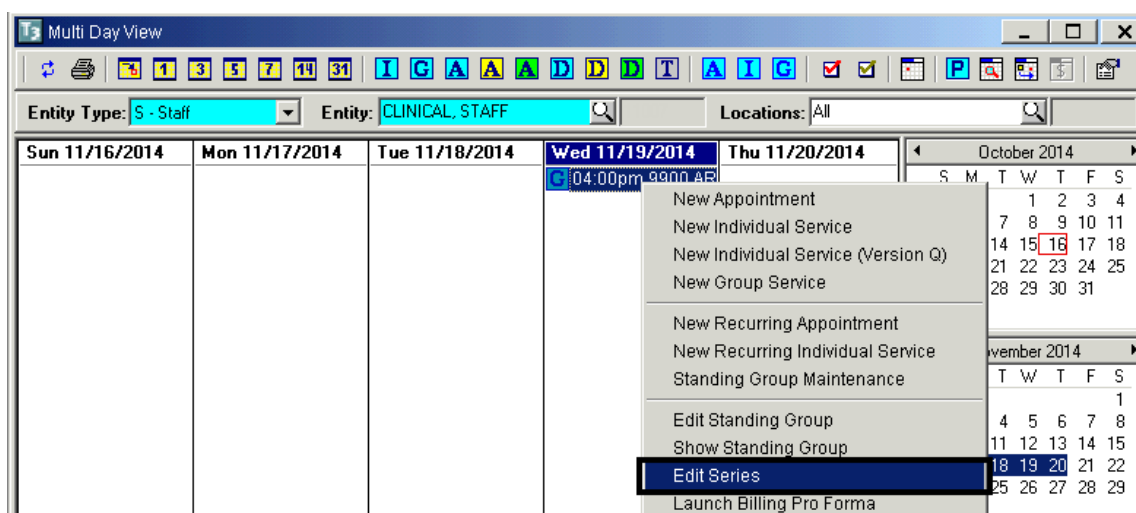


## EDIT SERIES OF GROUP SERVICE EVENTS

*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”



- The “Add/Edit Standing Group” screen appears. Click on the “Schedule” tab

Add/Edit Standing Group (Administrative Access)

Main **Schedule**

ID: 9900ART Description: 9900 ART THERAPY CLASS

Unit: TRAINING UNIT 9900

SubUnit: TRAINING SUBUNIT 9901

Location: TRAINING UNIT 1

Slots: 10

Comments:

Save Clear Delete

Rules of Recurrence Cancel

- The list of scheduled groups displays. Click the date of the group to be edited, and click “Edit Group”

Add/Edit Standing Group (Administrative Access)

Main **Schedule**

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	<input checked="" type="checkbox"/>
11/12/2014	WEDNESDAY	04:00 PM	06:00 PM	8	<input type="checkbox"/>
11/19/2014	WEDNESDAY	04:00 PM	05:00 PM	8	<input type="checkbox"/>
11/26/2014	WEDNESDAY	04:00 PM	06:00 PM	8	<input type="checkbox"/>
12/03/2014	WEDNESDAY	04:00 PM	06:00 PM	8	<input type="checkbox"/>

☒ Unresolved Only ☐ All Copy Date: Add Group **Edit Group**

Copy for Paste Select All for Paste Paste from Copy Delete Selected Deselect All

Rules of Recurrence Cancel

- The “Add/Edit Group Service” screen appears. Make the appropriate changes, click “Save”, and click “Exit”

Add/Edit Group Service (Administrative Access)

**Event** [G] This Recurring Event will Occur in the Future. Standing Group ID: 9900ART

Subject: 9900 ART THERAPY CLASS

Date: 11/05/2014 Start Time: 4:00 PM Duration: 2:00 Stop Time: 6:00 PM

Unit: TRAINING UNIT 9900 Comment: Save Delete Clear

Sub Unit: TRAINING SUBUNIT 9901

Location: HHSA MH BILLING UNIT 1

Scheduled **Actual**

**Services**

Staff	Service	Start Time	End Time	Lead
CLINICAL, STAFF	35	04:00 PM	06:00 PM	<input checked="" type="checkbox"/>

Add Save Delete

Staff: CLINICAL, STAFF Service: REHAB-GROUP 35 35 Start: 4:00 PM Duration: 2:00 Stop: 6:00 PM

☒ Lead Staff during Time Period? Supervisor: 0

**Clients**

Client	Pr...	Start Time	End Time	C...	Cd...
FAKE, TEST	0.00	04:00 PM	06:00 PM	<input type="checkbox"/>	<input type="checkbox"/>
TEST, FAKE	0.00	04:00 PM	06:00 PM	<input type="checkbox"/>	<input type="checkbox"/>

Client: FAKE, TEST Unit: TRAINING UNIT 9900 Assign Unit 9900/9901

SUnit: TRAINING SUBUNIT 9901

☐ Transportation Required

Prov. To: Client Prov. At: Homeless/Emerg Shelter Start/Dur/Stop 4:00 PM

Out. Fac: 0 2:00

Con. Type: Face to Face App. Type: Scheduled 1 EBP/SS

Bill. Type: Not Applicable Int. Type: NOT APPLICABLE

Resolve Group Cancel Group Post Group **Billing Pro Forma** Event Log Print Payment **Exit**

Startdate	Day	Starttime	Endtime	Available	Select
11/05/2014	WEDNESDAY	04:00 PM	06:00 PM	8	<input checked="" type="checkbox"/>
11/12/2014	WEDNESDAY	04:00 PM	06:00 PM	8	<input type="checkbox"/>
11/19/2014	WEDNESDAY	04:00 PM	05:00 PM	8	<input type="checkbox"/>
11/26/2014	WEDNESDAY	04:00 PM	06:00 PM	8	<input type="checkbox"/>
12/03/2014	WEDNESDAY	04:00 PM	06:00 PM	8	<input type="checkbox"/>

- 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”

Startdate	Day	Starttime	Endtime	Available	Select
11/05/2014	WEDNESDAY	04:00 PM	06:00 PM	8	<input checked="" type="checkbox"/>
11/12/2014	WEDNESDAY	04:00 PM	06:00 PM	8	<input type="checkbox"/>
11/19/2014	WEDNESDAY	04:00 PM	05:00 PM	8	<input type="checkbox"/>
11/26/2014	WEDNESDAY	04:00 PM	06:00 PM	8	<input type="checkbox"/>
12/03/2014	WEDNESDAY	04:00 PM	06:00 PM	8	<input type="checkbox"/>

Startdate	Day	Starttime	Endtime	Available	Select
11/05/2014	WEDNESDAY	04:00 PM	06:00 PM	8	<input checked="" type="checkbox"/>
11/12/2014	WEDNESDAY	04:00 PM	06:00 PM	8	<input checked="" type="checkbox"/>
11/19/2014	WEDNESDAY	04:00 PM	05:00 PM	8	<input checked="" type="checkbox"/>
11/26/2014	WEDNESDAY	04:00 PM	06:00 PM	8	<input checked="" type="checkbox"/>
12/03/2014	WEDNESDAY	04:00 PM	06:00 PM	8	<input checked="" type="checkbox"/>

- 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”

Add/Edit Standing Group (Administrative Access)

Main Schedule

ID: 9900ART Description: 9900 ART THERAPY CLASS Slots: 10

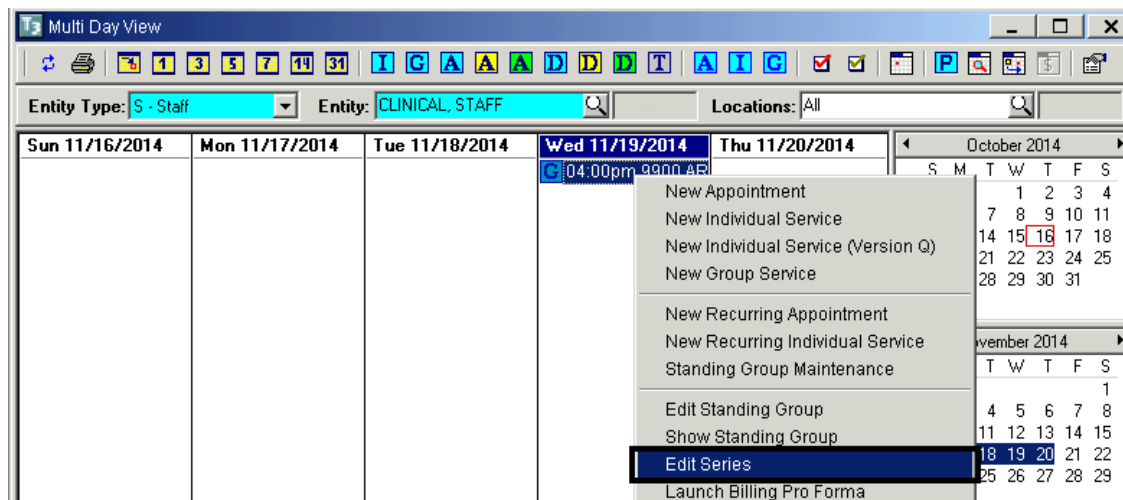
Startdate	Day	Starttime	Endtime	Available	Select
11/05/2014	WEDNESDAY	04:00 PM	06:00 PM	8	<input type="checkbox"/>
11/12/2014	WEDNESDAY	04:00 PM	06:00 PM	8	<input type="checkbox"/>
11/19/2014	WEDNESDAY	04:00 PM	06:00 PM	8	<input type="checkbox"/>
11/26/2014	WEDNESDAY	04:00 PM	06:00 PM	8	<input type="checkbox"/>
12/03/2014	WEDNESDAY	04:00 PM	06:00 PM	8	<input type="checkbox"/>

☒ Unresolved Only ☐ All Copy Date: Add Group Edit Group  
 Copy for Paste Select All for Paste Paste from Copy Delete Selected Deselect All  
 Rules of Recurrence Cancel

**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

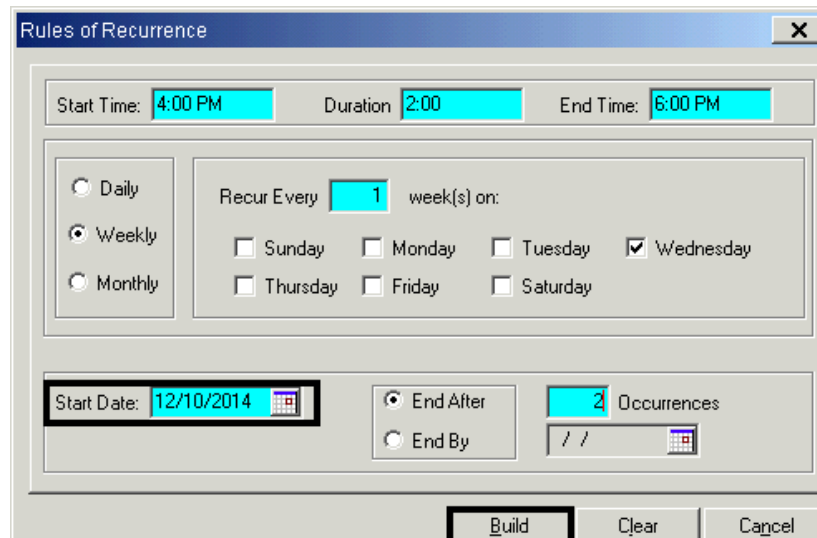
- Right click on the Standing Group in the staff person's schedule, and click "Edit Series"



- Click "Rules of Recurrence"

The screenshot shows the 'Add/Edit Standing Group (Administrative Access)' window. The 'Main' tab is selected. The 'ID' is '9900ART' and the 'Description' is '9900 ART THERAPY CLASS'. The 'Unit' is 'TRAINING UNIT' (9900), 'SubUnit' is 'TRAINING SUBUNIT' (9901), and 'Location' is 'TRAINING UNIT' (1). The 'Slots' are set to '10'. There is a 'Comments' text area. At the bottom, the 'Rules of Recurrence' tab is selected, and there are 'Save', 'Clear', 'Delete', and 'Cancel' buttons.

- 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 Recurrence

Start Time: 4:00 PM    Duration: 2:00    End Time: 6:00 PM

☐ Daily  
☒ Weekly  
☐ Monthly

Recur Every 1 week(s) on:

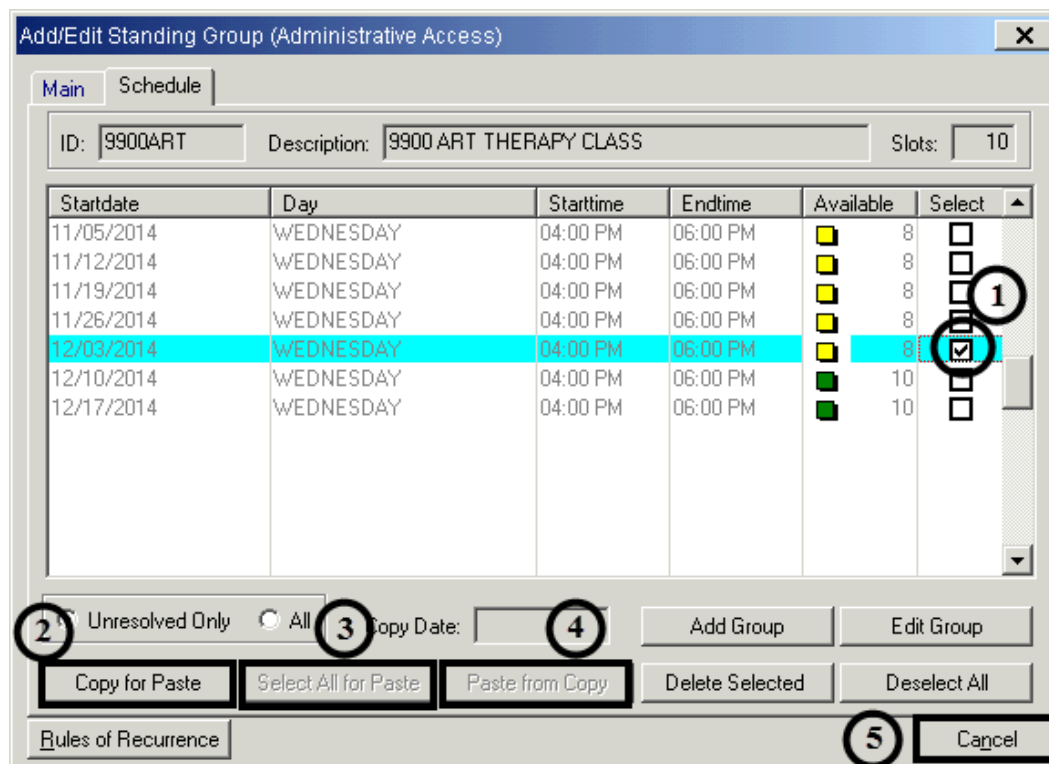
☐ Sunday    ☐ Monday    ☐ Tuesday    ☒ Wednesday  
☐ Thursday    ☐ Friday    ☐ Saturday

Start Date: 12/10/2014

☒ End After    2 Occurrences  
☐ End By    / /

Build    Clear    Cancel

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



Add/Edit Standing Group (Administrative Access)

Main    Schedule

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	<input type="checkbox"/>
11/12/2014	WEDNESDAY	04:00 PM	06:00 PM	8	<input type="checkbox"/>
11/19/2014	WEDNESDAY	04:00 PM	06:00 PM	8	<input type="checkbox"/>
11/26/2014	WEDNESDAY	04:00 PM	06:00 PM	8	<input type="checkbox"/>
12/03/2014	WEDNESDAY	04:00 PM	06:00 PM	8	<input checked="" type="checkbox"/>
12/10/2014	WEDNESDAY	04:00 PM	06:00 PM	10	<input type="checkbox"/>
12/17/2014	WEDNESDAY	04:00 PM	06:00 PM	10	<input type="checkbox"/>

☒ Unresolved Only    ☐ All    Copy Date:    Add Group    Edit Group

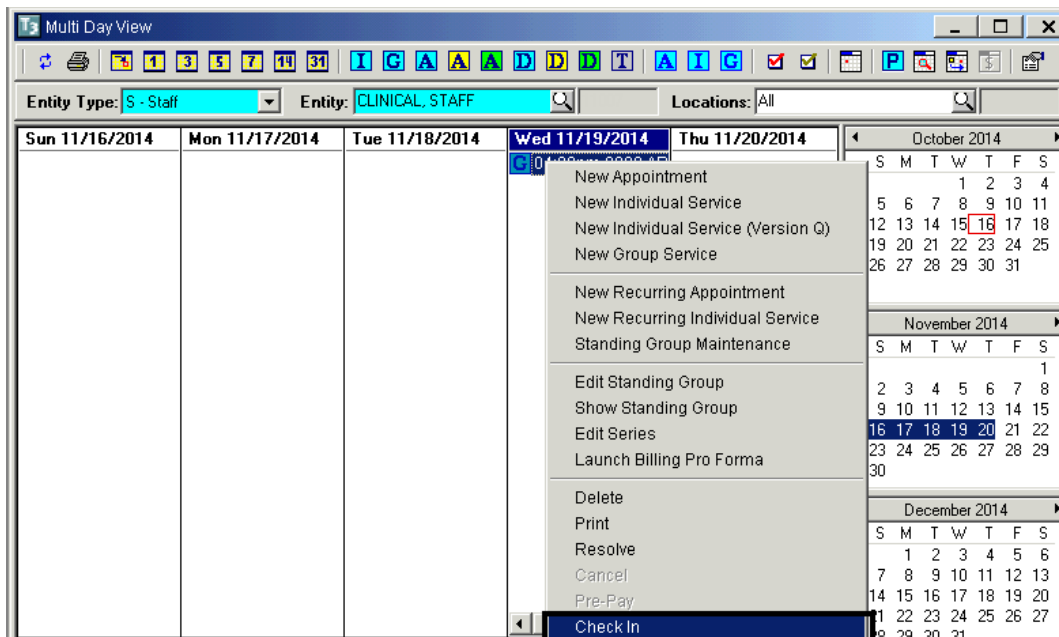
Copy for Paste    Select All for Paste    Paste from Copy    Delete Selected    Deselect All

Rules of Recurrence    Cancel

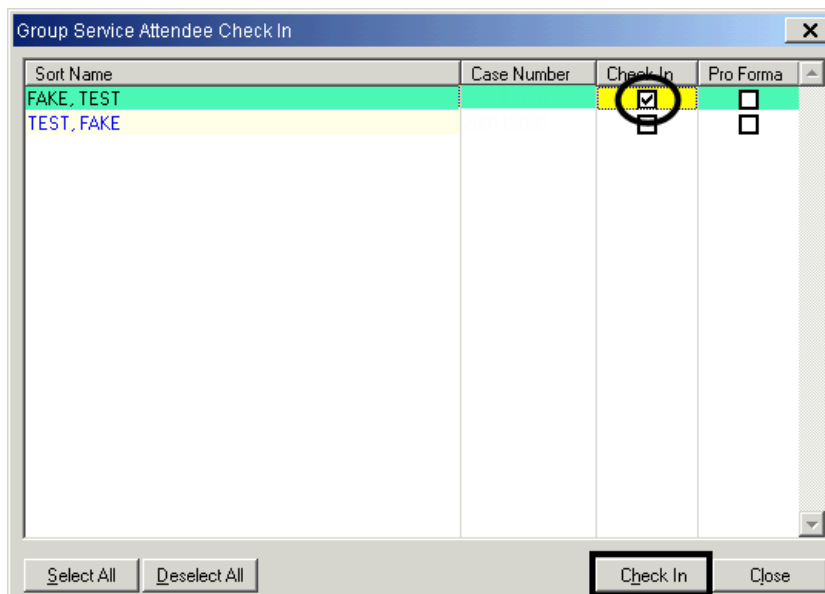
## CHECK IN/CHECK OUT GROUP

To check in a client in a group:

- Right click on the group service event, and click “Check In”

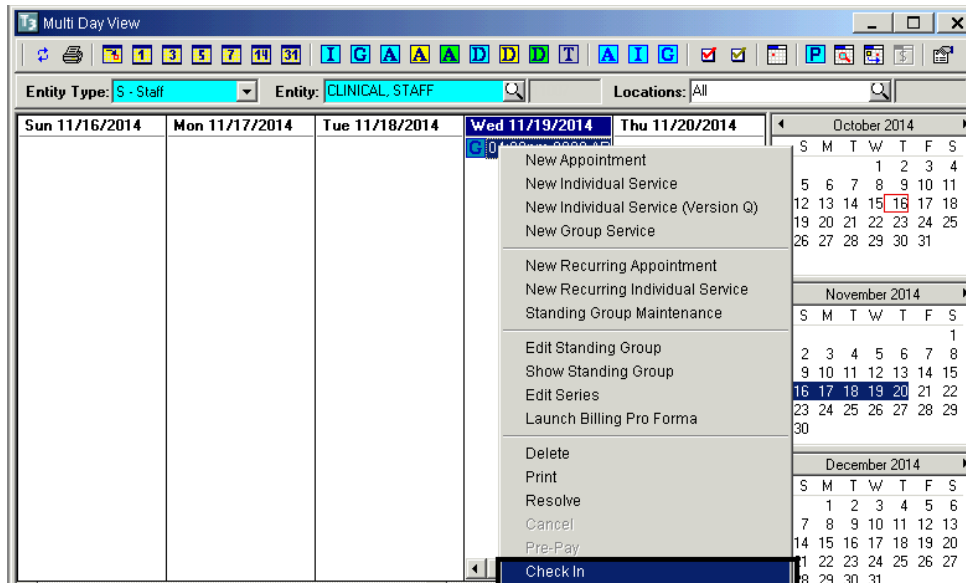


- Check the box next to the client who has arrived for the service event, and click “Check In”

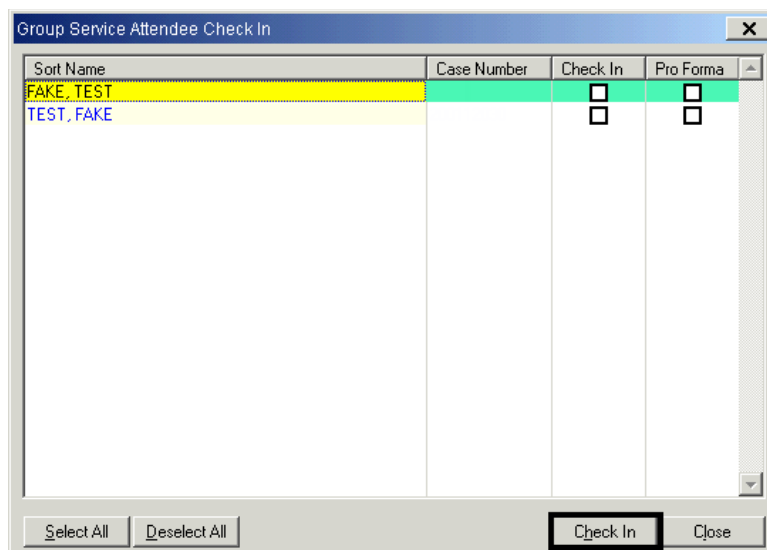


To check out a client in a group:

- Right click on the group service event, and click “Check In”

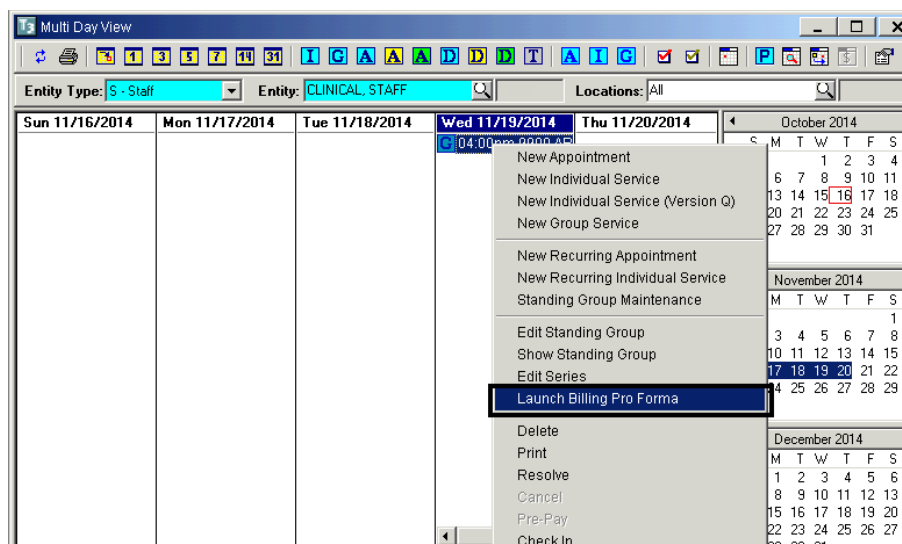


- Uncheck the box next to the client who has arrived for the service event, and click “Check In”

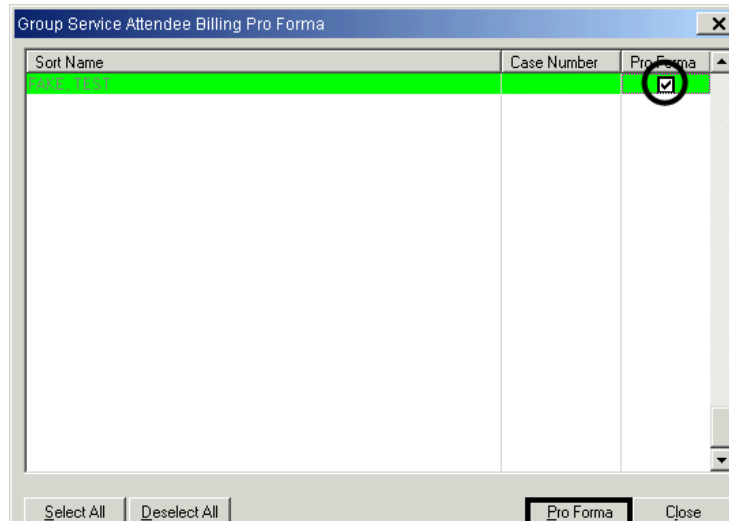


## **BILLING PRO FORMA GROUP**

- Right click on a group service event and click “Launch Billing Pro Forma”



- Check the “Pro Forma” box next to the desired client(s) and click “Pro Forma”



- The dialog box appears. Once you are done viewing, click “OK”

**Billing Pro Forma Dialog**

Client: TEST, FAKE	Admitted	Date: 10/21/2014	Start: 06:00 AM
SAL:		Duration: 1:00	Stop: 07:00 AM

Unit: TRAINING UNIT	9900	Provided To: Client and Family	B
SubUnit: TRAINING SUBUNIT	9901	Provided At: Other Community/Field Unspec	D
Server: CLINICAL, STAFF		Contact Type: Face to Face	F
Supervisor:		Outside Facility:	
Service: REHAB-GROUP 35	35	Appointment Type: Cancelled by Client	3
Lab:		Billing Type: Not Applicable	X
Quantity:		Intensity Type: NOT APPLICABLE	N

Pay So...	Benefit ...	From

Auth#	P..	Procedure	From	Thru	Qty	Used

**Billing Pro Forma**

Testing Contract Pay Source 8999/8999  
 Determining Billing Information for NON BILLABLE FOR OSHPD, BEN  
 Service is not Covered by Benefit Plan 8999.  
 Looking up Client's Insurance Coverages.  
 Testing Contract Pay Source 8998/4010  
 Determining Billing Information for NON BILLABLE FOR LIHP, LIHP  
 Service is not Covered by Benefit Plan 4010.  
 Testing Contract Pay Source 8998/4105  
 Determining Billing Information for NON BILLABLE FOR LIHP, LIHP C  
 Service is not Covered by Benefit Plan 4105.  
 Testing Contract Pay Source 8998/4109

Colla... OK

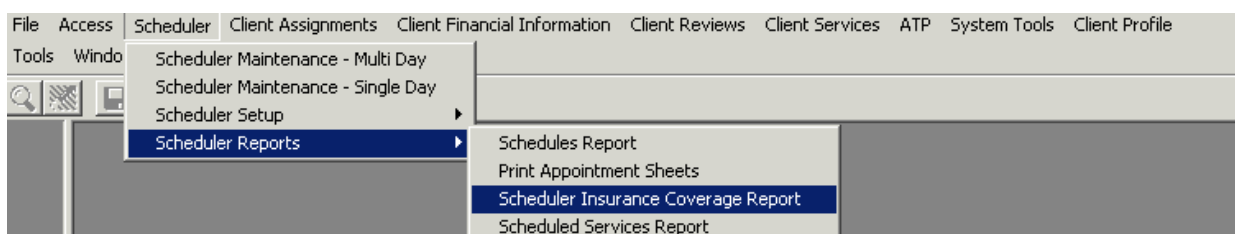
**NOTE:** If you are viewing the Billing Pro Forma for several clients, you will click “OK” for each client

## PRINTING INSURANCE COVERAGE REPORT FOR SCHEDULED CLIENTS

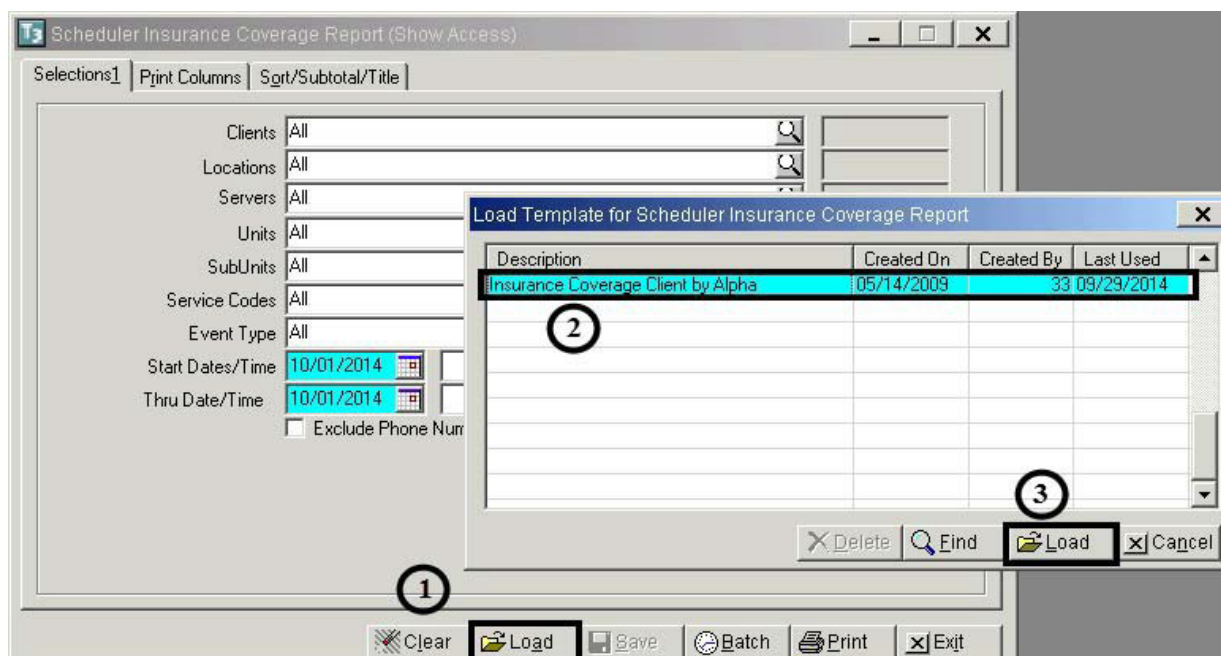
The “Scheduler Insurance Coverage Report” shows 3<sup>rd</sup> Party Coverage for scheduled clients. A template has been created for use.

### To Access the Template:

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



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





**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

The screenshot shows the 'Scheduler Insurance Coverage Report (Show Access)' window with the 'Selections 1' tab selected. The window contains several input fields for filtering the report:

- Clients:** All
- Locations:** ENTER YOUR UNIT HERE (highlighted with a black box)
- Servers:** All
- Units:** All
- SubUnits:** All
- Service Codes:** All
- Event Type:** All
- Start Dates/Time:** 10/01/2014 (highlighted with a black box)
- Thru Date/Time:** 10/31/2014 (highlighted with a black box)

Below these fields is a checkbox labeled 'Exclude Phone Numbers for Clients not 'Okay to Call at Home''. At the bottom of the window is a toolbar with buttons: Clear, Load, Save, Batch, Print (highlighted with a black box), and Exit.

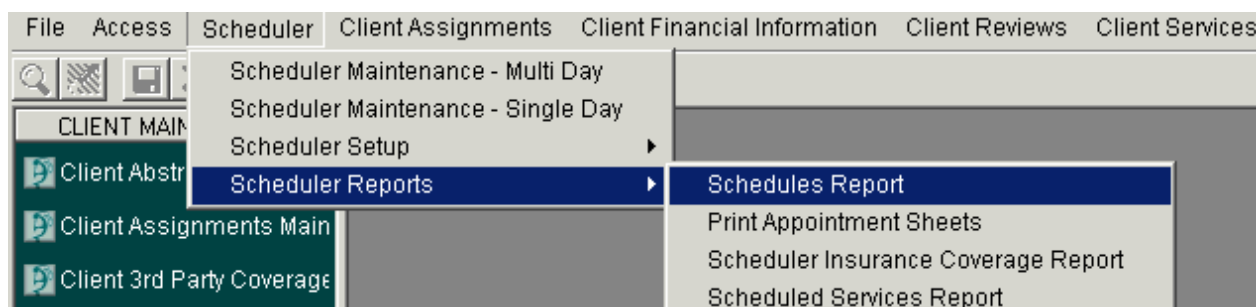
**NOTE:** The report will sort by client name

## PRINTING ONE STAFF PERSON'S SCHEDULE

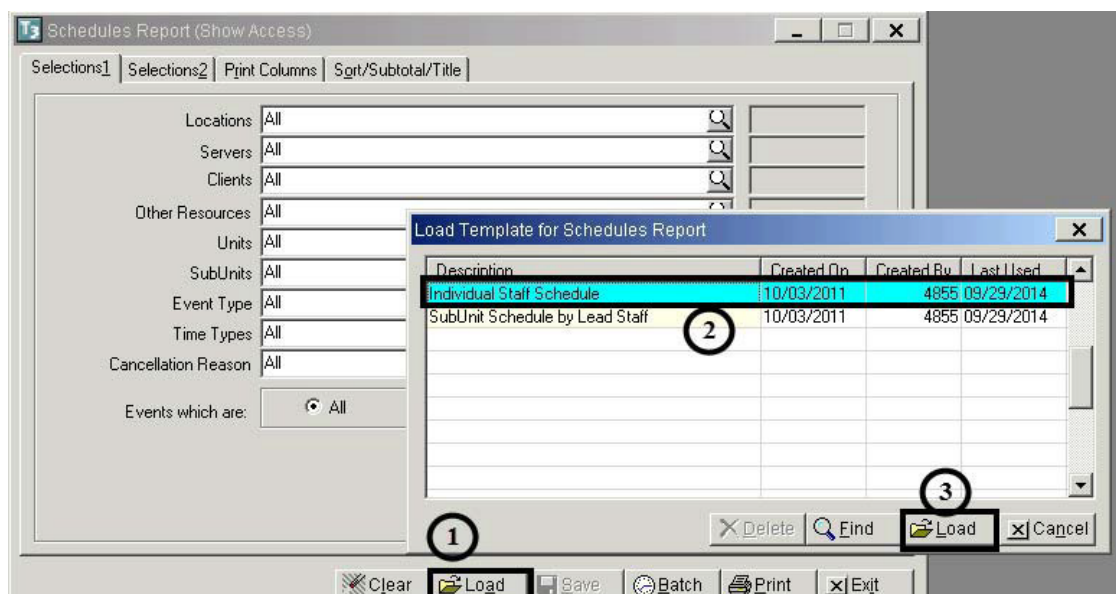
The “Schedules Report” will print a staff person’s schedule for a specific date range. A template has been created to use

### To Access the Template:

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



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



### **Selections 1 Tab**

- Enter the unit number in the “Locations” field
- Enter the staff ID number in the “Servers” field

### **Selections 2 Tab**

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

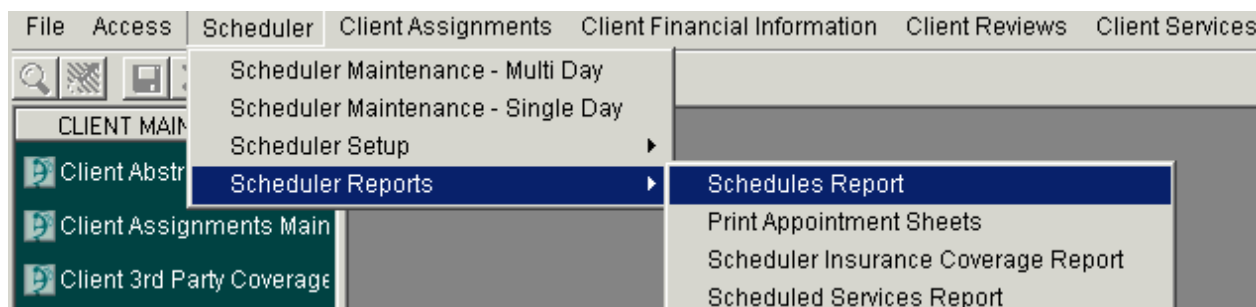
**NOTE:** This report includes all scheduled appointments. If the “C” column near the end of the report notes “N” (No), that means that the appointment has not been cancelled. A “Y” (Yes) notes that the appointment has been cancelled

## PRINTING STAFF'S SCHEDULES FOR A LOCATION

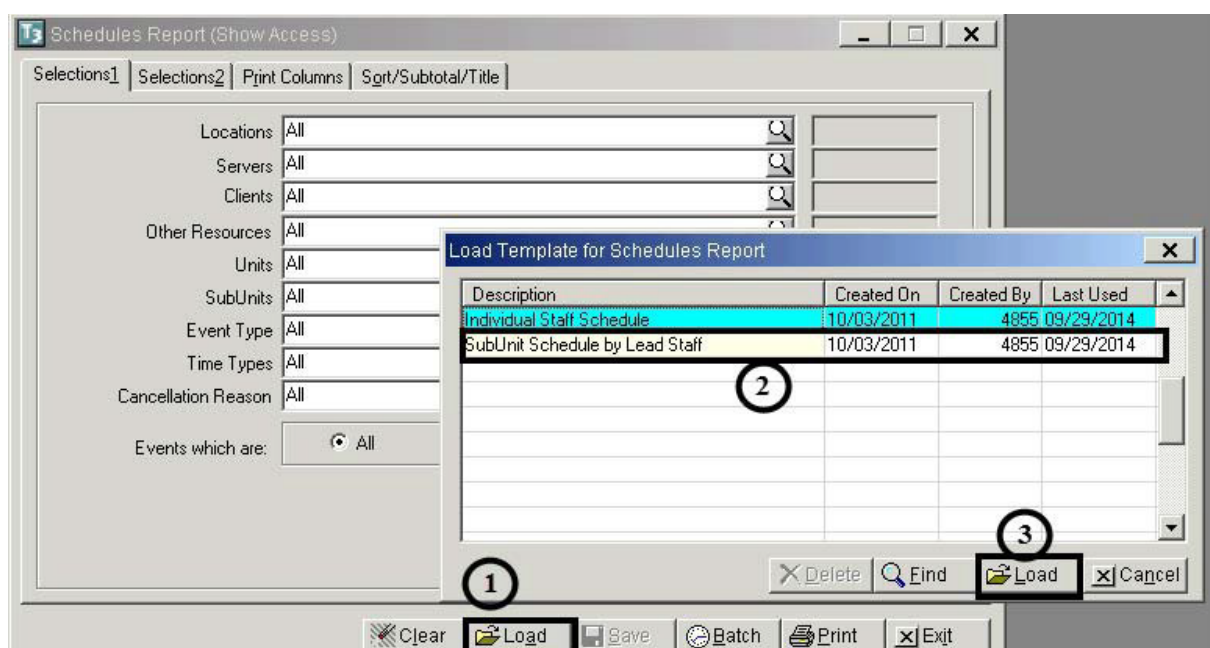
The “Schedules Report” will print staff(s) schedules for a specific date range. A template has been created to use

### To Access the Template:

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



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



### **Selections 1 Tab**

- Enter the unit number in the “Locations” field

Schedules Report (Show Access)

Selections1 | Selections2 | Print Columns | Sqrt/Subtotal/Title

Locations: ENTER YOUR UNIT HERE

Servers: All

Clients: All

Other Resources: All

Units: All

SubUnits: All

Event Type: All

Time Types: All

Cancellation Reason:

Events which are: ☒ All ☐ Resolved ☐ UnResolved ☐ Canceled

Clear Load Save Batch Print Exit

### **Selection 2 Tab**

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

Schedules Report (Show Access)

Selections1 | Selections2 | Print Columns | Sqrt/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'

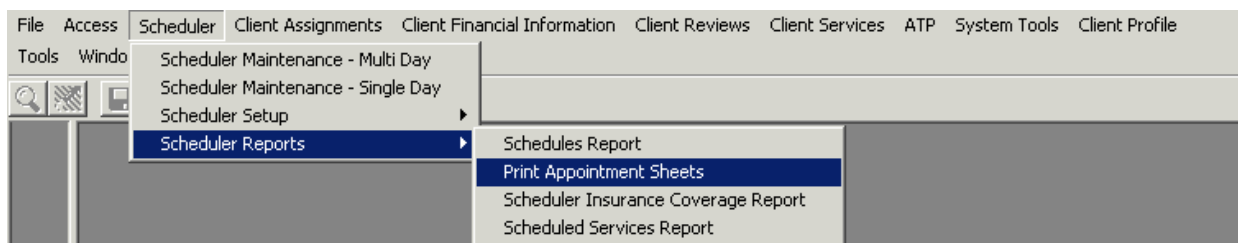
Clear Load Save Batch Print Exit

## PRINTING APPOINTMENT SHEETS AND CONSUMER ENCOUNTER FORMS

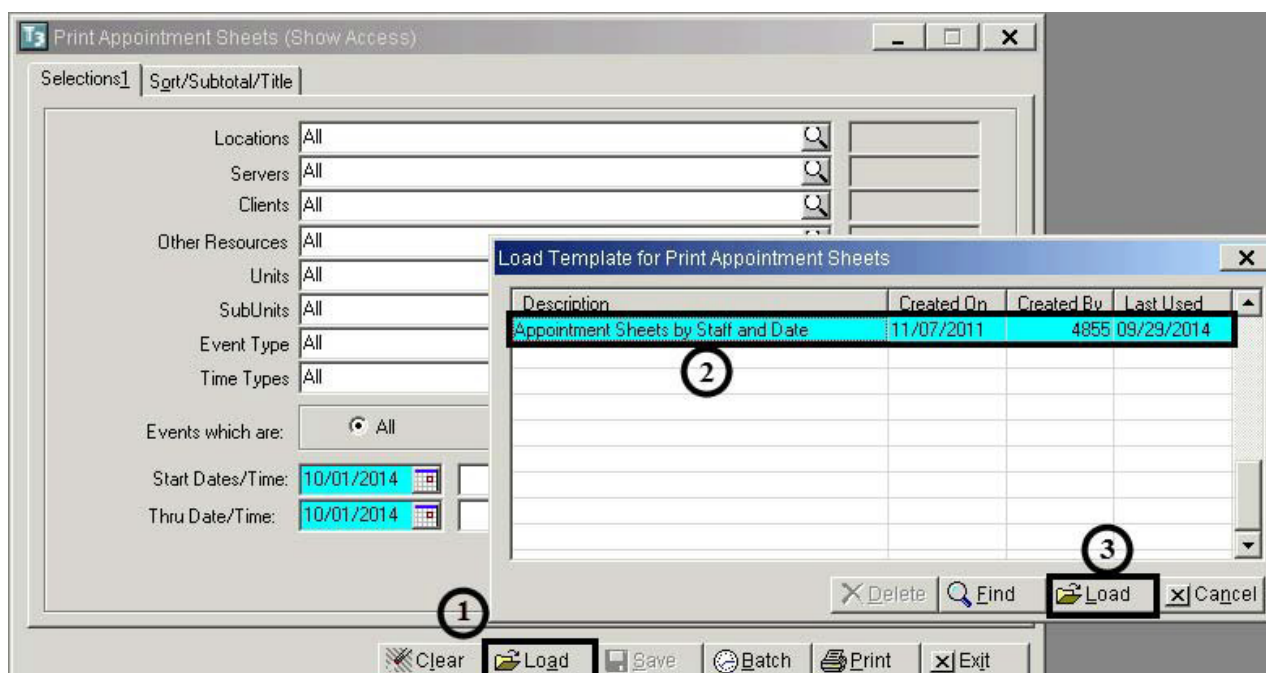
This report prints appointment sheets for appointment events and consumer encounter forms for service events. A template has been created that prints the forms based on the date range selected. The forms will be sorted by staff and will print in order by the date and time of the event

### To Access the Template:

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



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



**Selection 1 Tab**

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

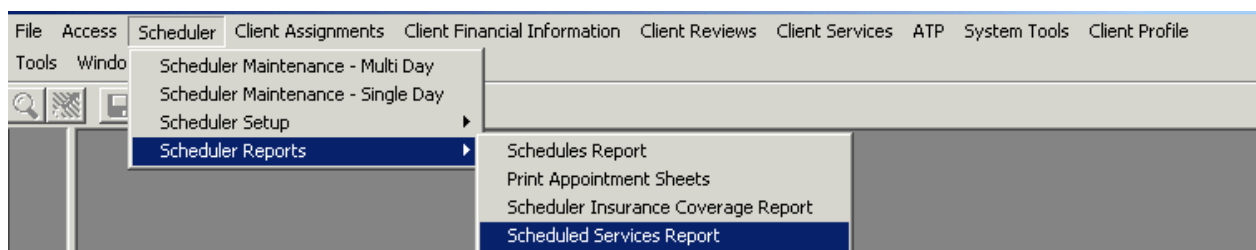
The screenshot shows a software window titled "Print Appointment Sheets (Show Access)". It features a tabbed interface with "Selections1" and "Sort/Subtotal/Title". The "Selections1" tab is active, displaying a list of selection criteria: Locations, Servers, Clients, Other Resources, Units, SubUnits, Event Type, and Time Types. Each criterion has a corresponding input field. The "Locations" field is highlighted with a black box and contains the text "ENTER YOUR UNIT HERE". The "Start Dates/Time" and "Thru Date/Time" fields are also highlighted with black boxes and contain the date "10/01/2014". Below these fields, there are radio buttons for "Events which are:" with options "All", "Resolved", and "UnResolved". The "All" option is selected. At the bottom of the window, there is a toolbar with buttons for "Clear", "Load", "Save", "Batch", "Print", and "Exit". The "Print" button is highlighted with a black box.

## **PRINTING SCHEDULED SERVICES REPORT**

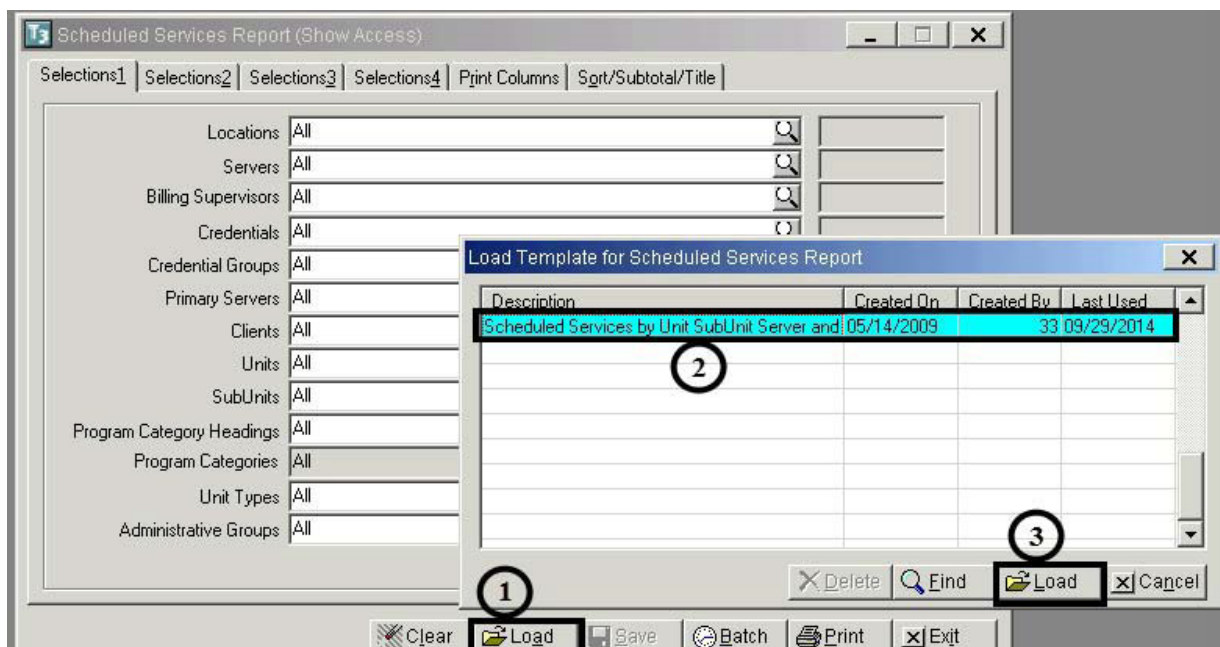
The “Scheduled Services Report” prints service events only and can be used to compare scheduled services with those that were actually provided. A template has been created for use

### **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”





### **Selection 1 Tab**

- Enter the unit number in the “Locations” field

**Scheduled Services Report (Show Access)**

Selections1 | Selections2 | Selections3 | Selections4 | Print Columns | Sqrt/Subtotal/Title

Locations	ENTER YOUR UNIT HERE	
Servers	All	
Billing Supervisors	All	
Credentials	All	
Credential Groups	All	
Primary Servers	All	
Clients	All	
Units	All	
SubUnits	All	
Program Category Headings	All	
Program Categories	All	
Unit Types	All	
Administrative Groups	All	

Clear Load Save Batch Print Exit

### **Selection 3 Tab**

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

**Scheduled Services Report (Show Access)**

Selections1 | Selections2 | Selections3 | Selections4 | Print Columns | Sqrt/Subtotal/Title

Data Entered By: All

Cancellation Reason:

Services which are: ☒ All ☐ Resolved ☐ UnResolved ☐ Canceled

Check In Status: ☒ All ☐ Checked In ☐ Not Checked

Services where Transportation is: ☒ All ☐ Required ☐ Not Required

Service Date/Time: 10/01/2014

Thru Date/Time: 10/31/2014

Entered Date/Time: / /

Thru Entered Date/Time: / /

☐ Exclude Phone Numbers for Clients not 'Okay to Call at Home'

Clear Load Save Batch Print Exit

## 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	<a href="http://www.optumsandiego.com">www.optumsandiego.com</a>
Service Codes	CCBH (Anasazi) User Manual/QM Unit