Calendar Search and User Setup: Available and Reserved Times

User Guide

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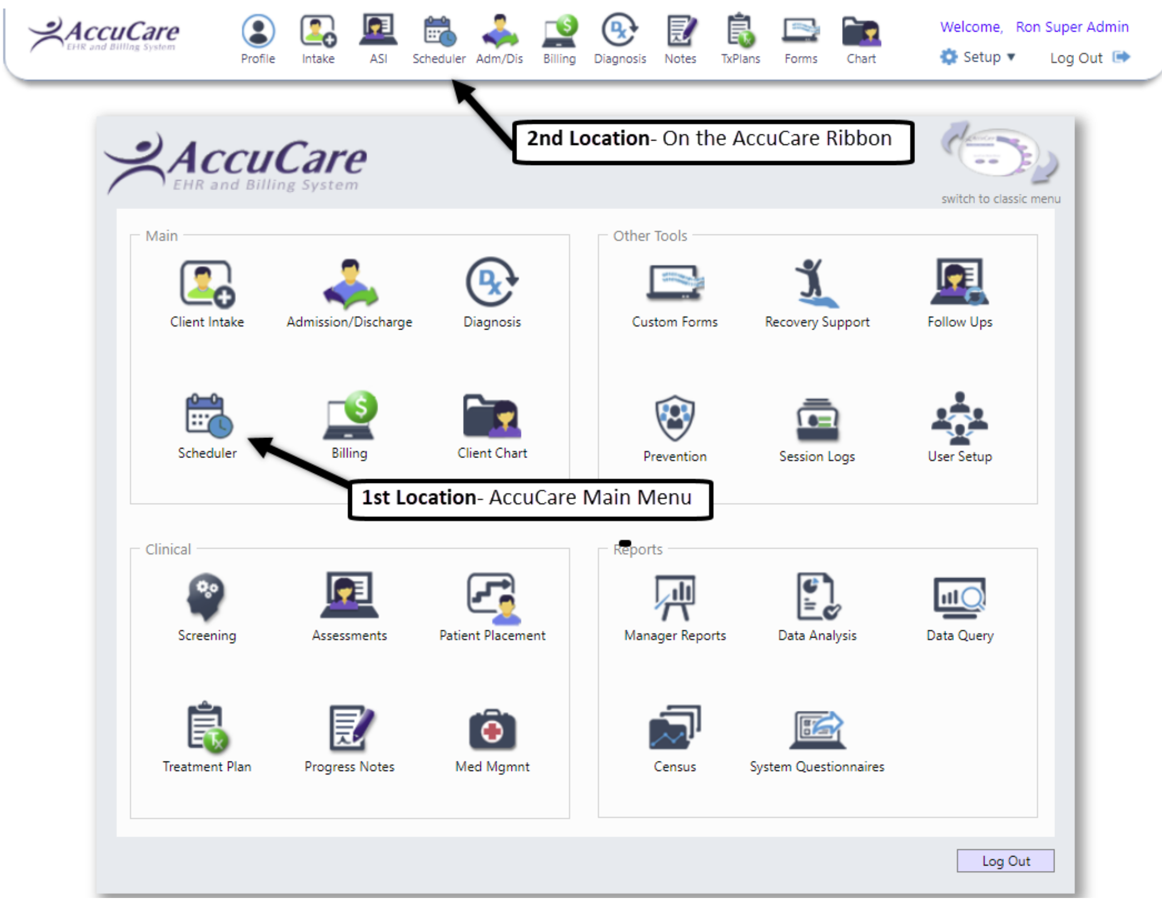
What is the Calendar Search Function

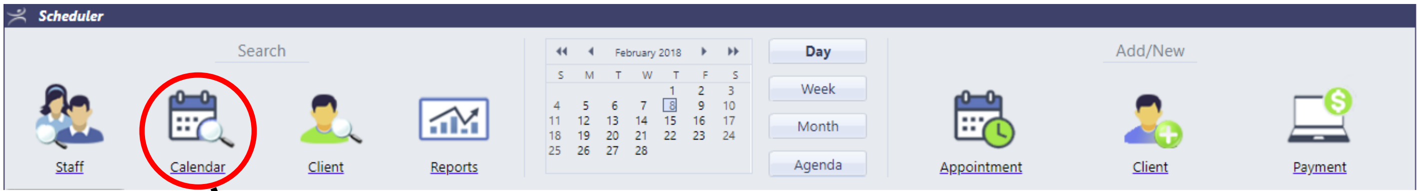
The Calendar Search function provides you with the ability to find appointments using filter combinations such as time classifications, duration, date range, session type, staff attributes, staff and location.

Where would I find the Calendar Search Function

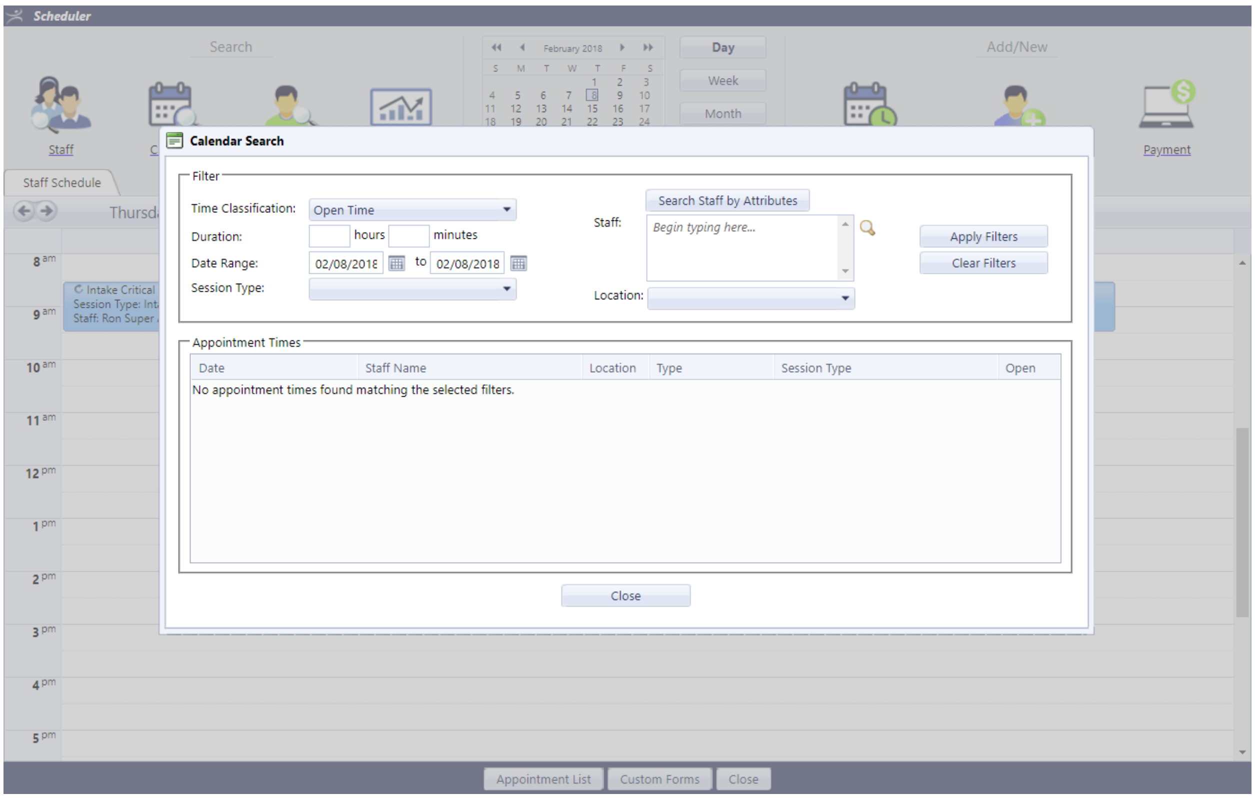
The calendar search function is located in the Scheduler Module. There are two locations where you can open the scheduler. The first location is on the main menu. The second location can be found on the AccuCare ribbon.



The Calendar search function can be found under the list of Search Icons.



When you click the Calendar Icon you will be presented with the Calendar Search dialog box



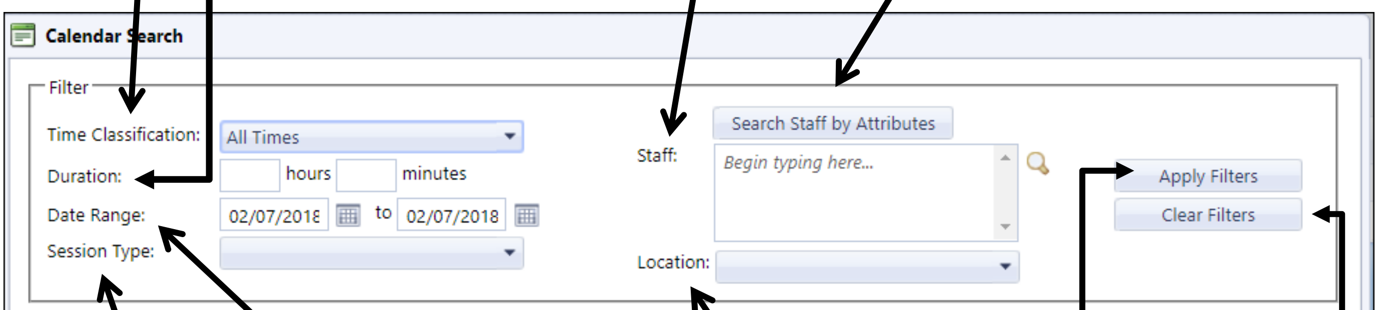
Overview Calendar Search Filter Options

Time Classification: Here you are given a list of different times like All Times, Reserved, Open Time and Scheduled Times

Staff: Allows you to look for certain staff of one or more. You can either type in the first 2 letter of the first name or use the advanced spyglass to the right search box to search.

Duration: Allows a filter to find a length time. For example 1 hour and 30 minutes or 1 hour or 15 minutes

[Search Staff by Attributes] button: Allow you to search for assigned attributes to help narrow down your choices more closely.



Session Types: You can also filter on session types to narrow you results.

[Apply Filters] or [Clear Filters] buttons – activate your filter selections or clears them to start a new filter search

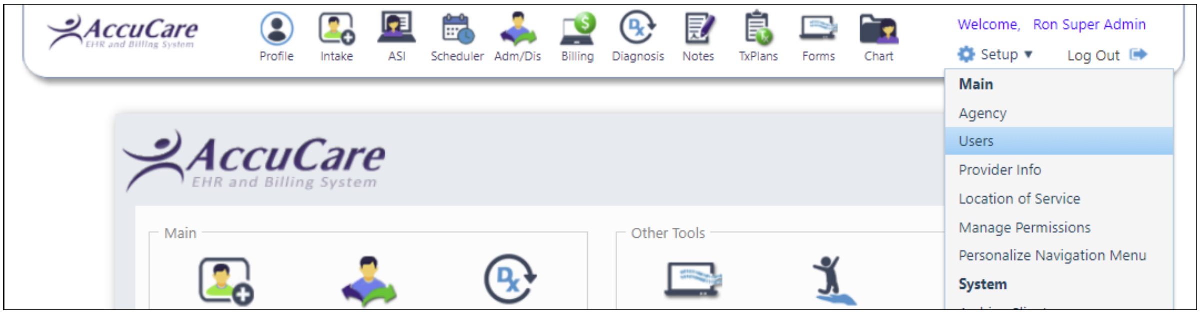
Date Range: Please take note of the defaulted date range given. It is set to give a today's date and is changeable.

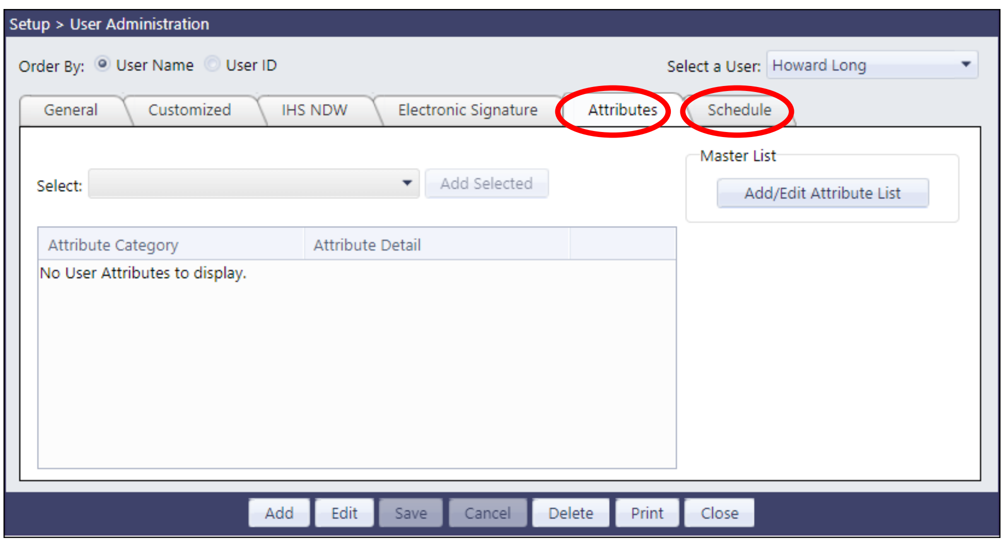
Location: If you have setup your location of services you will be able to use this search to narrow down the location.

Benefit from your Calendar Filter Options by setting up these Tabs

We recommend you setup the ***Attributes*** and ***Schedule*** tabs in User Administration module. This will insure your users receive most benefit from the calendar search filter options. You must be have Super Admin to access this tab in the User Administration Module.

1) Open User Administration by going the Menu Ribbon → Setup → Users



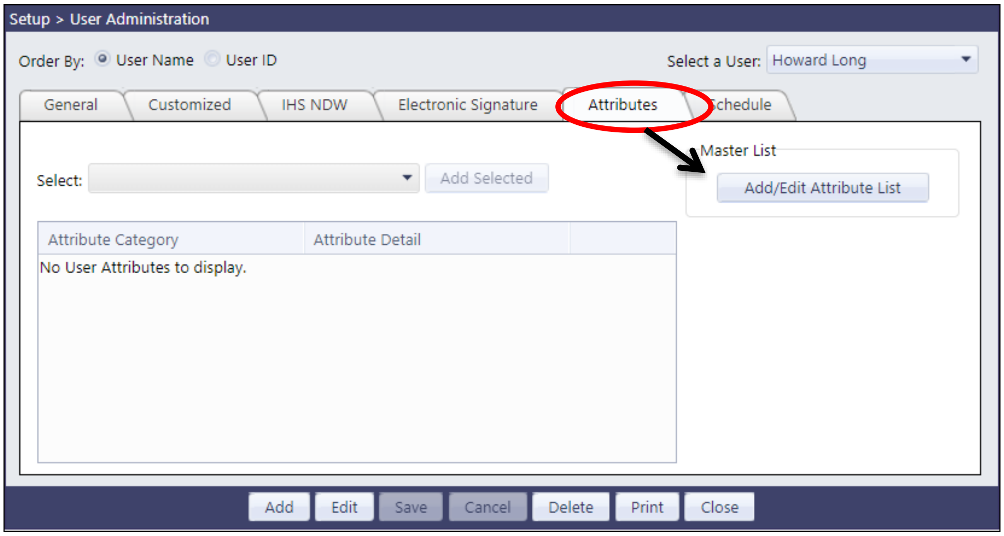


Setup, Assigning and Searching: User Attributes

When you are creating an appointment for client you want to match the client with best clinician to meet their needs. The Attributes Tab can help you with this by creating a master list of your user's attributes and assigning those that apply accordingly.

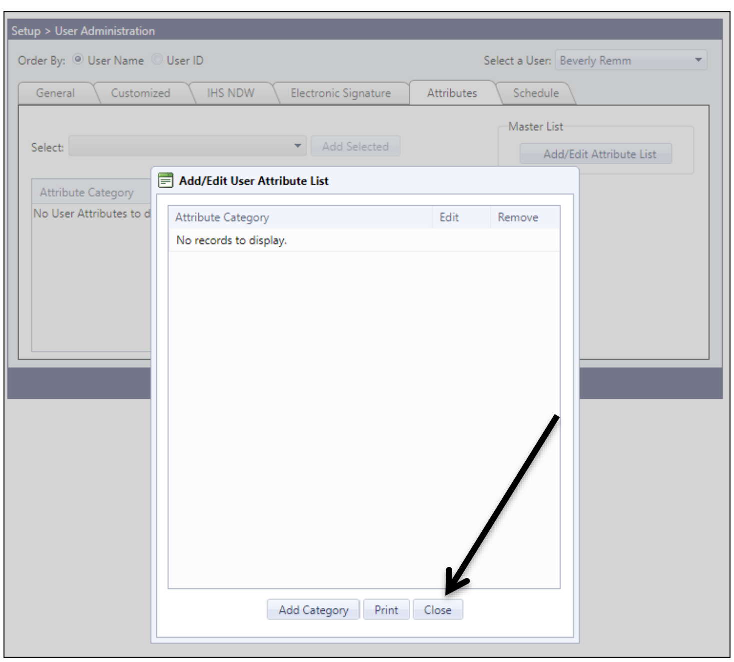
To begin click the Attributes Tab and select you user.

If this is the first time you have access the Attributes Tab you will need to click the [Add/Edit Attribute List] button] to setup your master list of attributes.

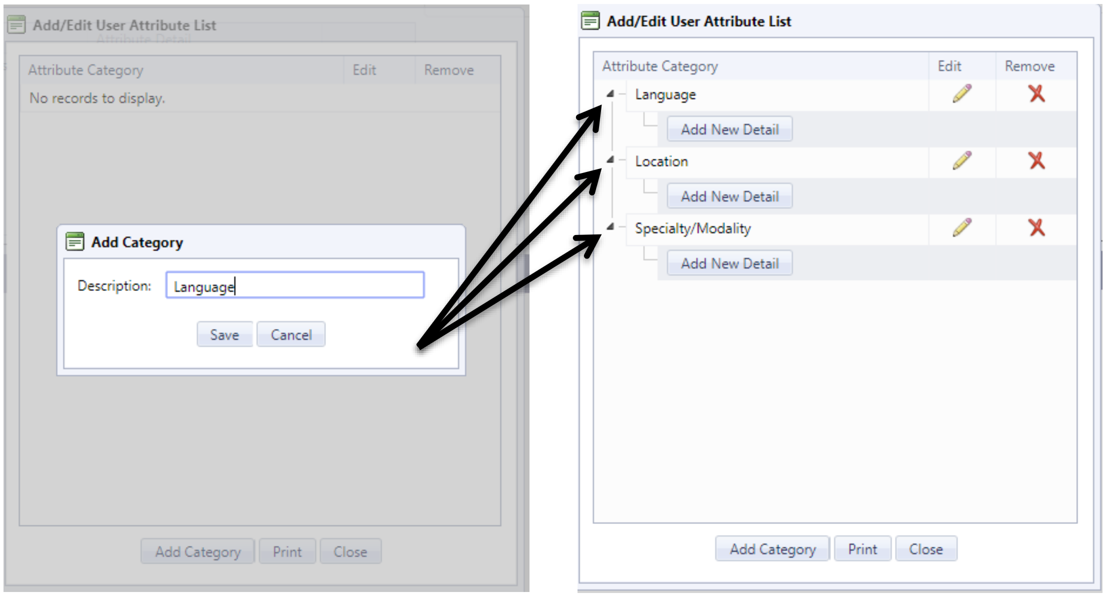


Add/Edit Attribute List – creating your list

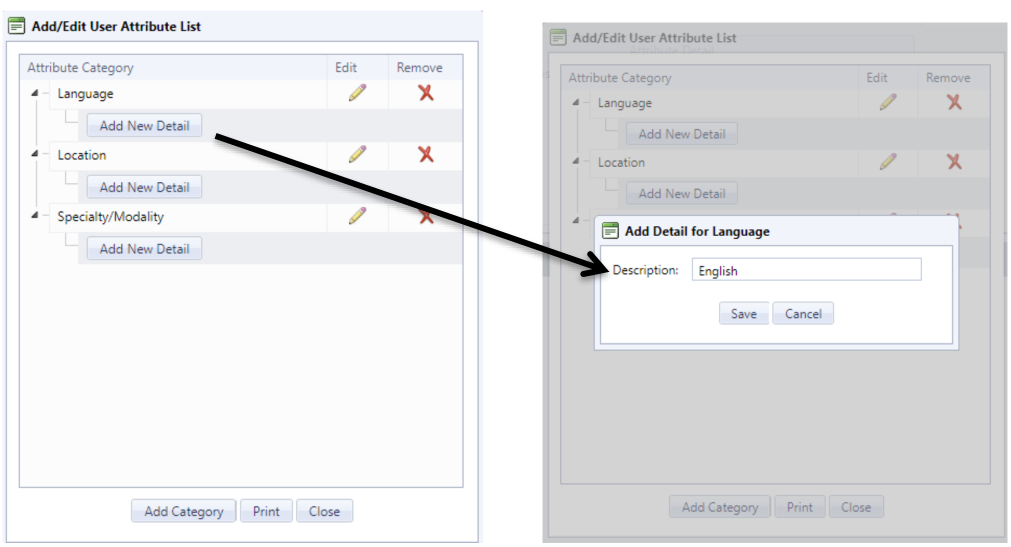
When access for the first time this what you should see. To begin click on the [Add Category] button



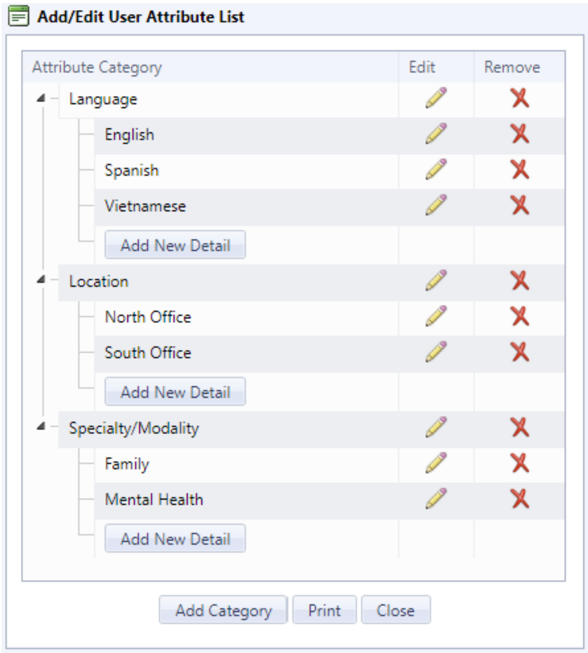
First add your categories that reflect the attributes you would like to associate to you users. In this example, I am creating Language, Location and Specialty/Modality as my categories.



Next I built a list of details for my Language categories by clicking the [Add New Detail] button.



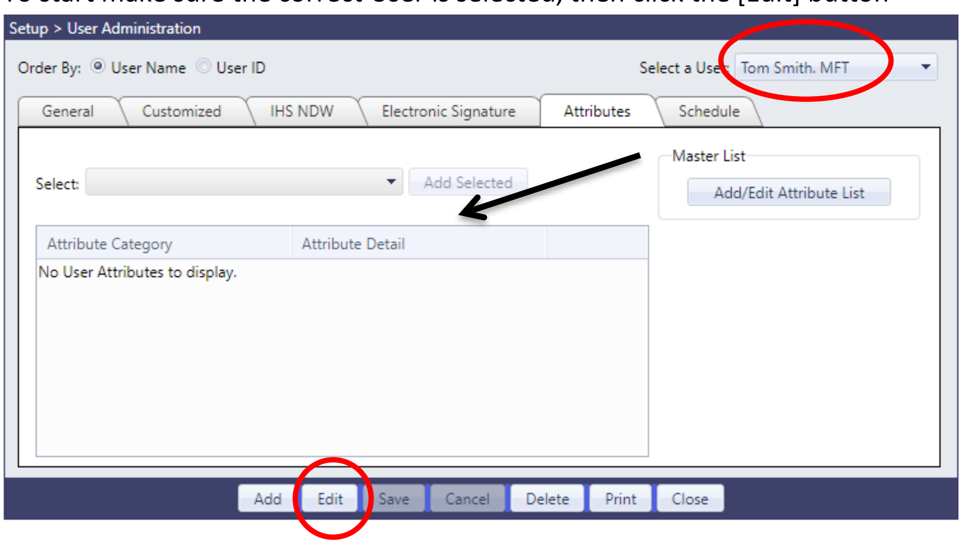
After adding details for each of the categories I click the [Close] button.



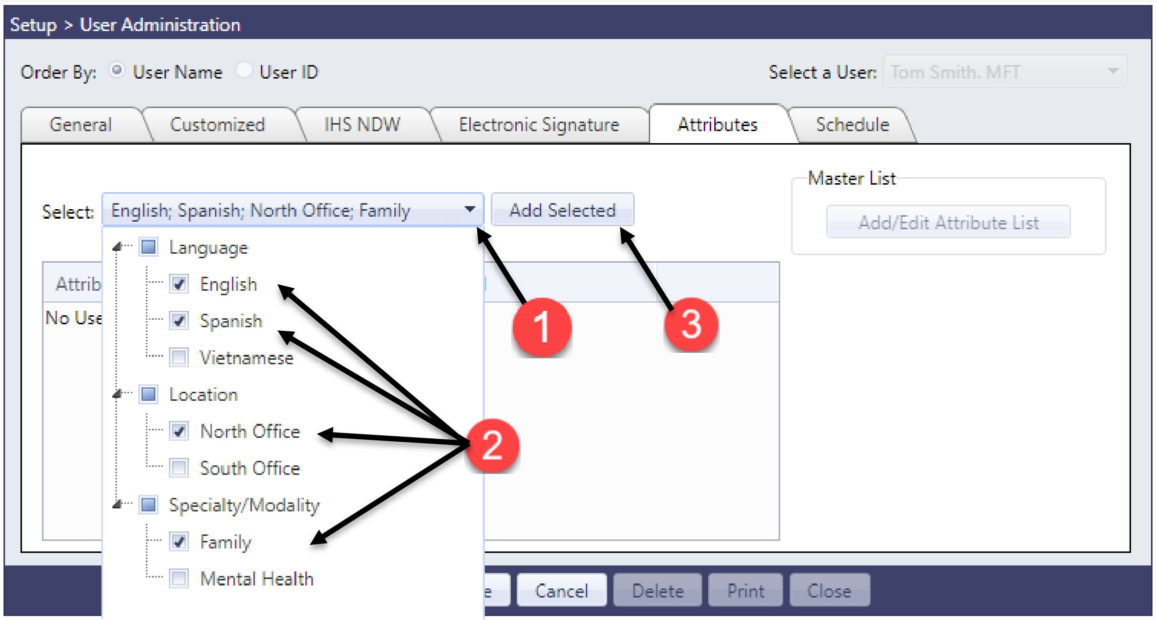
Assign your Master List of Attributes to Users

Now that we have created an attributes list you will be able to assign or associate attributes that are applicable to each of your users.

1) To start make sure the correct User is selected, then click the [Edit] button

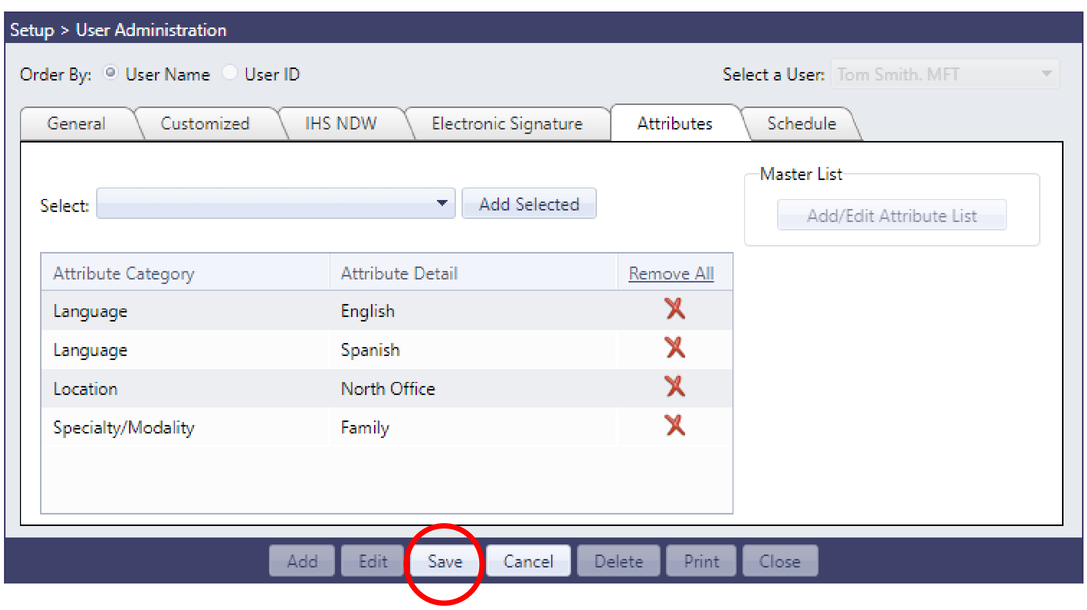


2) Next click the Select dropdown arrow for the list of categories and details. Check the ones that apply to the user and click the [Add Selected] button.



3) Review your selections and make changes if necessary. The select the **[Save]** button to complete this process.

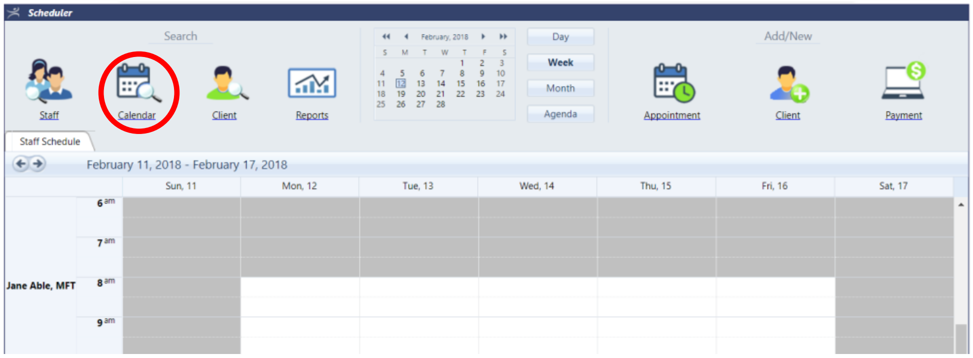
NOTE: If you do not click [Save] your attribute selections will be removed.



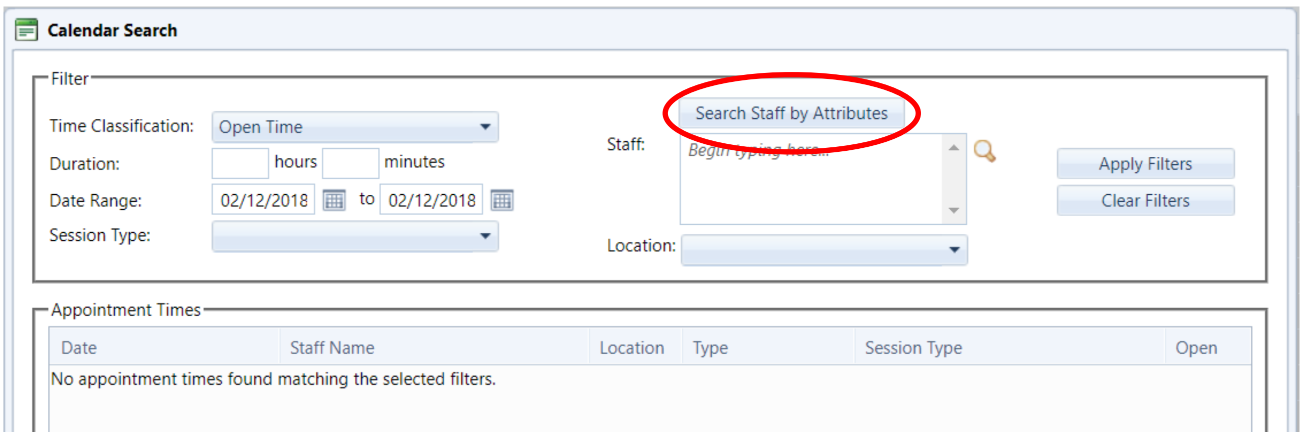
Calendar Search for Users based on Attributes

You can search the calendar based on the user's attributes (which you just setup).

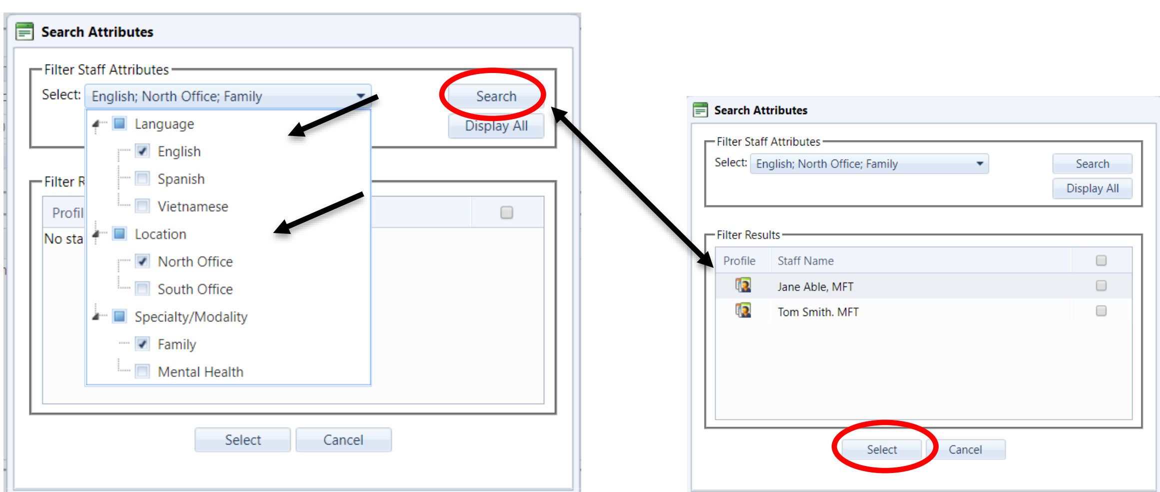
1) First select Calendar Search icon on the main Scheduler window



2) Select the Search Staff by Attributes button

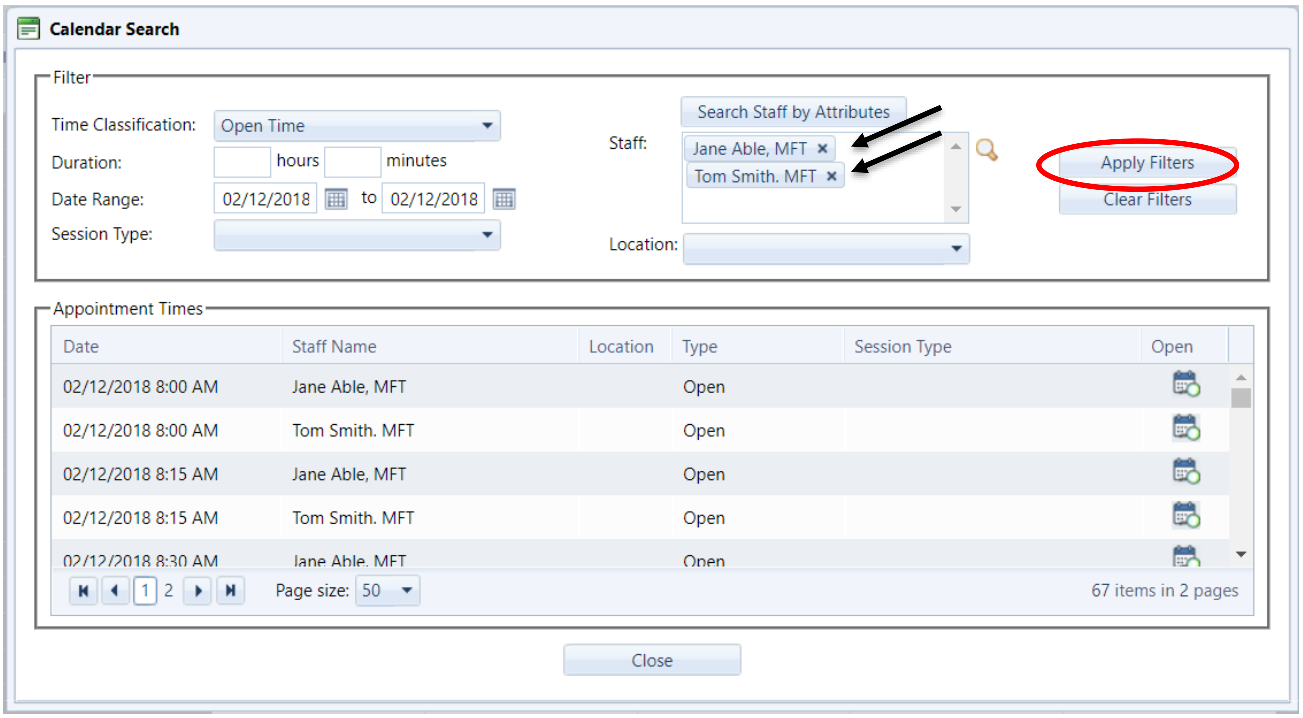


3) Select from the dropdown list, the attributes you are looking for, then click on Search. The staff that match your attribute criteria will display for you to select. Check the staff you want to continue to search the calendar on, and click on Select.



4) The staff you selected will appear in the Staff list box. You may continue to search the calendar using the different filters.

NOTE: Remember to select [Apply Filters] once you have made all of your filter selections.



Setting Up Available and Reserved Times

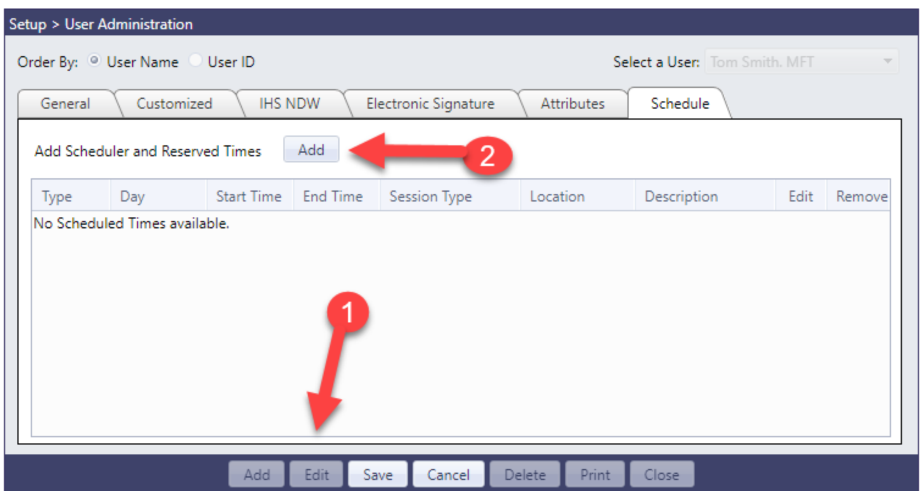
The Schedule tab in User Administration allows you setup available and reserved times for each of your users. This is beneficial when using the calendar search in scheduler, so you can filter based on times available, reserved (assigned) times, etc.

SETTING UP STAFF AVAILABLE TIME

Available Time means setting up days and times the user will show on the calendar as being ***available*** or open to be scheduled for an appointment. The calendar will "gray out" all the other times that are not listed as available. When you view the person's schedule via calendar view, you will be able to see areas what is available vs what is not. This is a visual representation of time available (and not available).

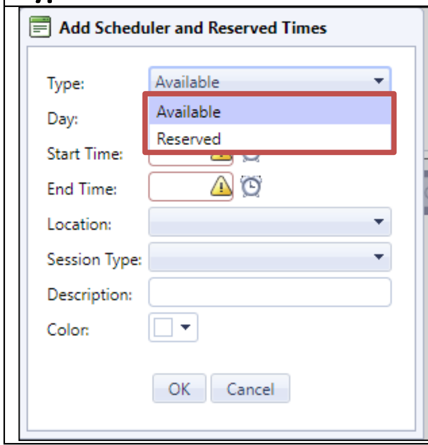
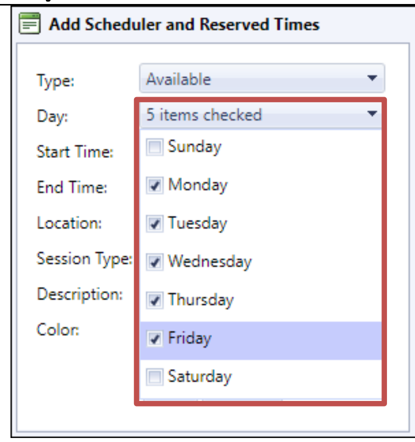
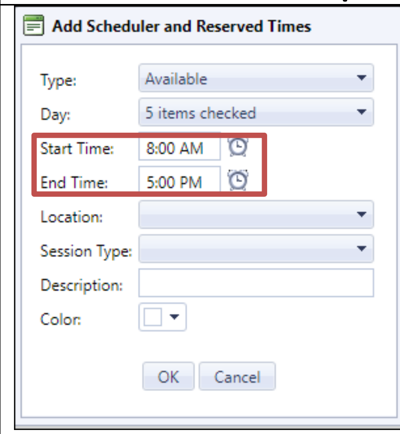
For Example: Clinician Jane Able works Monday through Friday, 8am to 5pm. You should setup her schedule to show she's available/open for any appointments from 8am to 5pm, Monday through Friday.

First you would you click the [Edit] button 1 then Click the [Add] button 2

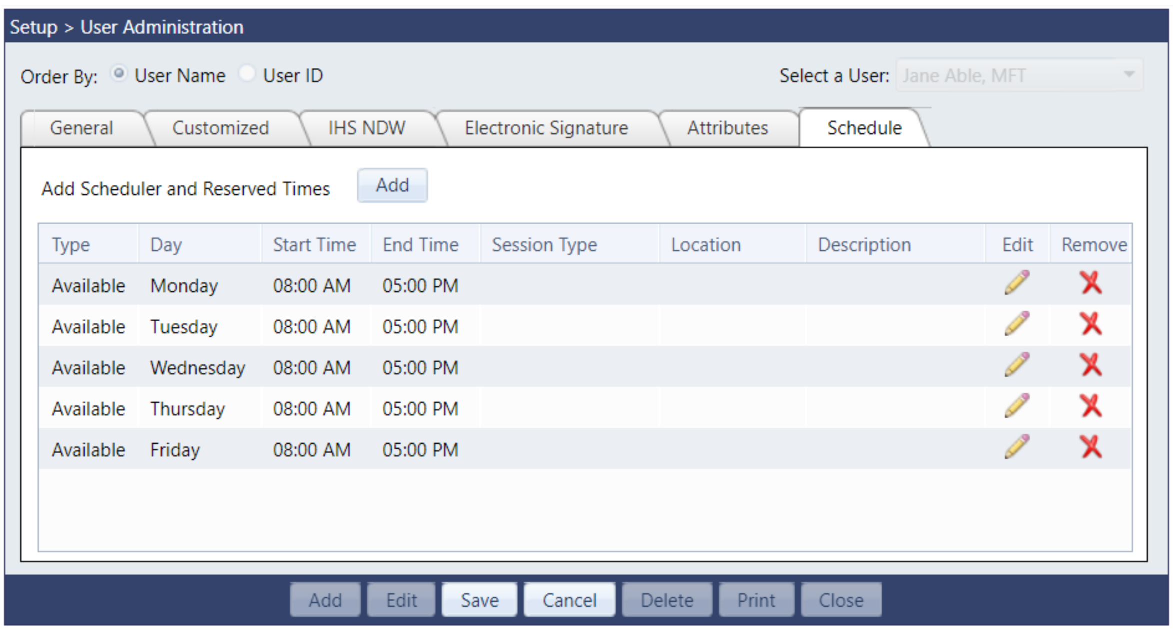


Next, setup Jane’s work schedule to show her work week as seen in these screen shots.

<u>Please Note -</u> You will only need to setup Type, Day and start/end times. Location, Session Type, Description and Color should remain blank, as these do not affect Availability. (they are used in Reserved times)

Type = Available	Day = Check Mon to Fri	Start and End Time 8am – 5pm
		

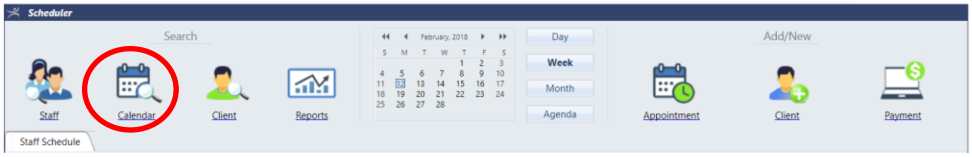
Here are the results of these entries after you click the [OK] button. Don’t forget to **click the [Save]** button to accept these changes.



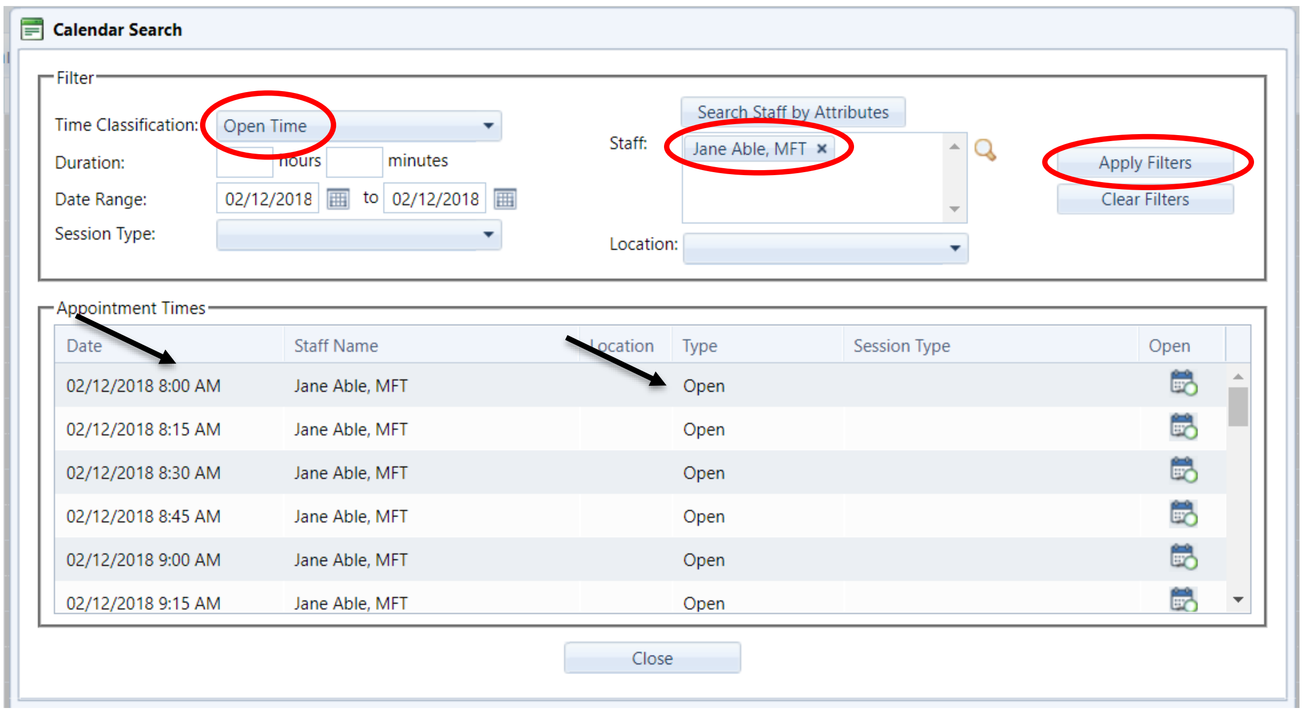
Calendar Search of Available Times

You can search for available times for Jane (or any/all staff),

1) First select the Calendar Search icon from the Scheduler window



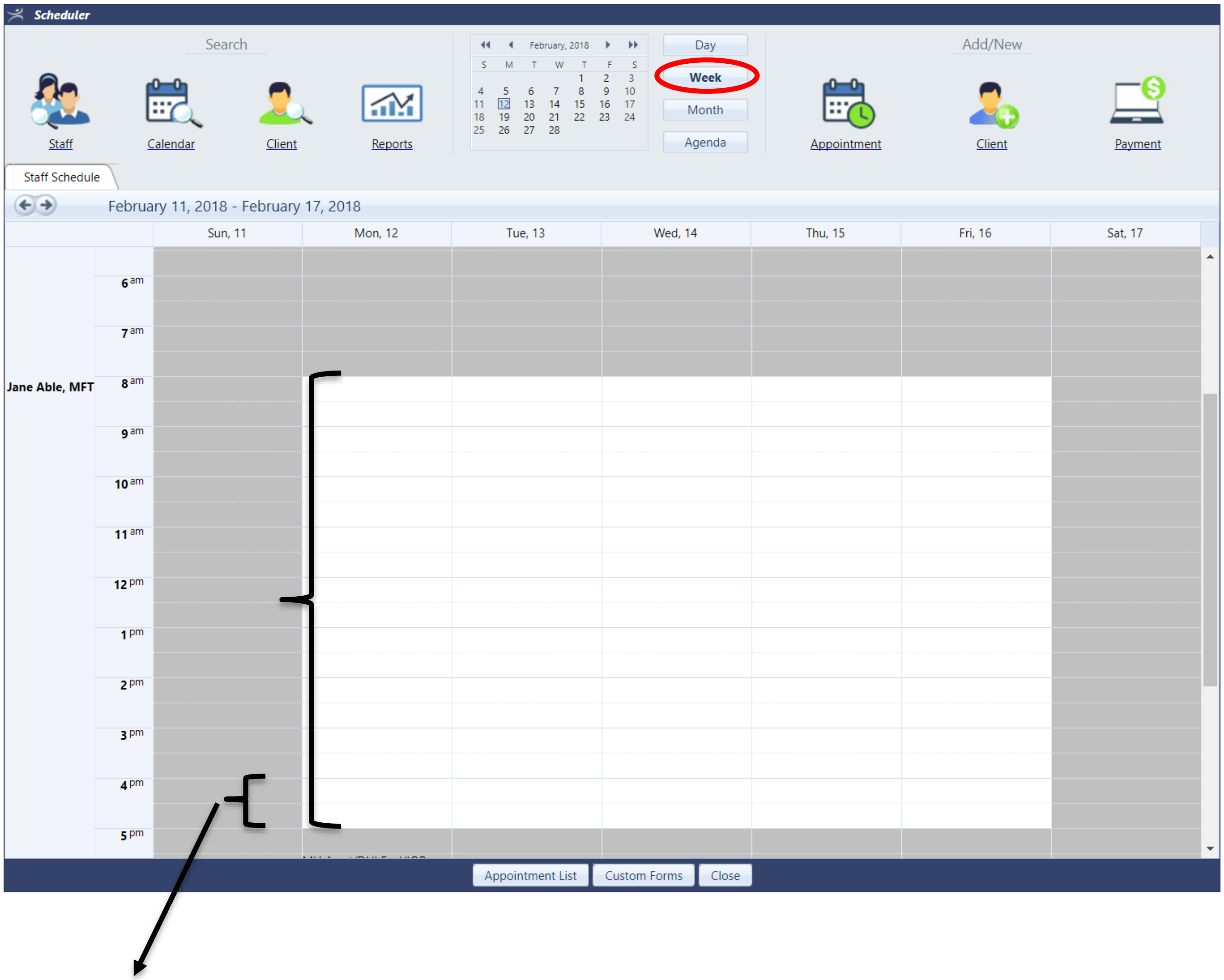
2) Select the "Open/Available" time category and type in the staff (or leave blank) and click on [Apply Filters]. The grid will display all available/open times for staff selected.



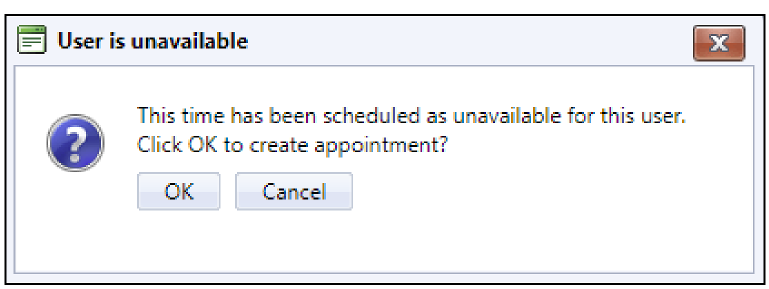
***NOTE:** Since Jane was setup as being available from 8am to 5pm, the appointment times begin at 8am and will provide times through 5pm.*

View of Scheduler showing Available Time

Here is a screen shot of Jane's Week View schedule after setting her **AVAILABLE** schedule in User Administration. You may still schedule an appointment outside of these times (i.e. in the gray time slots). As mentioned, this only a visual representation of the times she plans to be available for work or appointments.



<u>Important Note:</u> If this clinician or someone else were to schedule an appointment **<u>outside of the available times</u>** they would receive an alert message, however the appointment could still be scheduled. It is <u>only</u> an alert to let the user know.

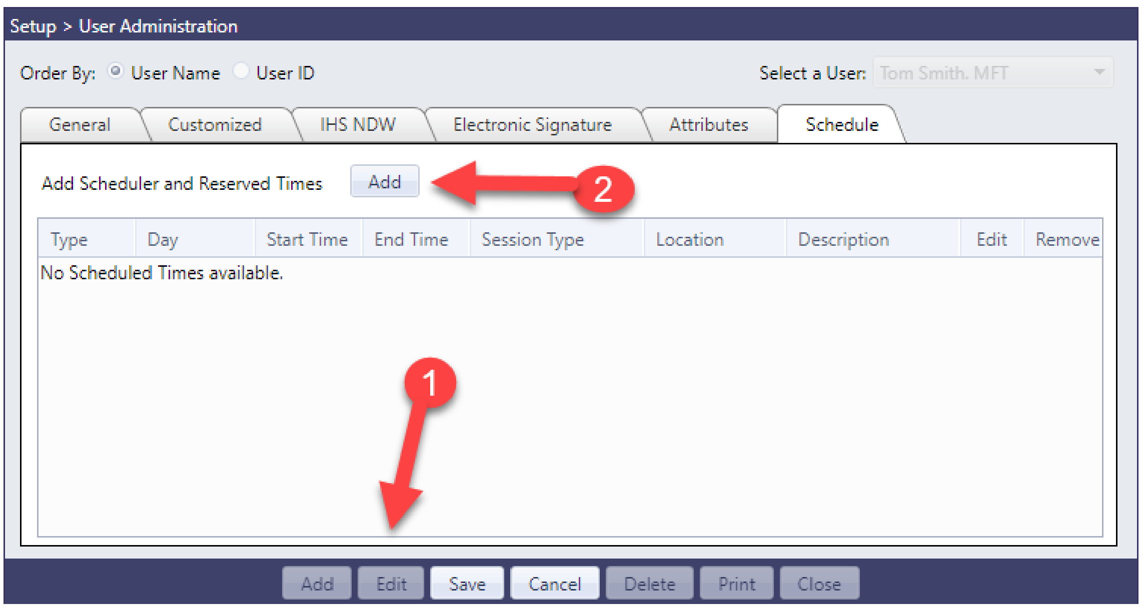


SETTING UP STAFF RESERVED TIME

Reserved Time means designating days and times that a user has set aside or assigned for specific events, which might include a session type (or multiple session types), daily meetings or lunch to name a few. The days and times will display on the calendar view, as being reserved for whatever specific event that was chosen. Similar to Available Time, this is a visual queue of time reserved for specific appointments, however does not restrict the user from scheduling another appointment.

For Example: Clinician Jane Able wants to let everyone know that she can do a Mental Health Assessment or DUI Evaluation on Monday's of every week from 10am to 12pm. We should set up Jane's Reserved time to reflect on her calendar that on Monday's, from 10am to 12pm, she has reserved that time to do a Mental Health Assessment or DUI Evaluation appointment.

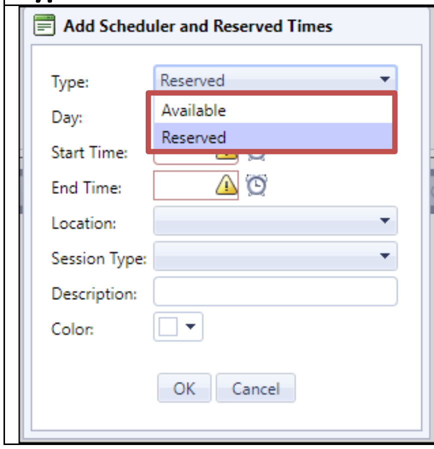
To start, first click the [Edit] button 1 then Click the [Add] button 2



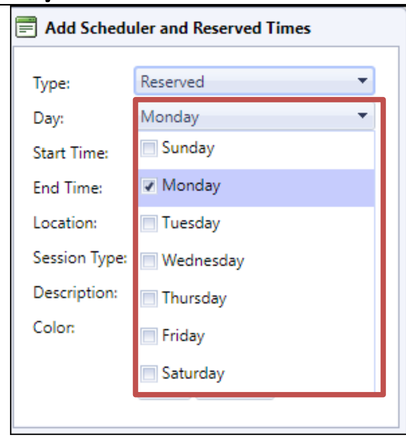
Now let's setup Jane's work schedule to reserved time these multiple sessions for the same day and time.

This example shows the first setup of the three entries to make, Available, Monday, 10am to 12pm.

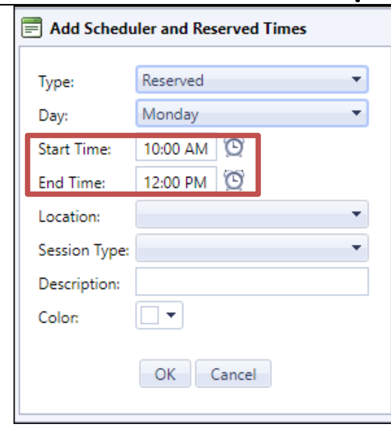
Type = Available



Day = Check Mon



Start and End Time: 10am-12pm



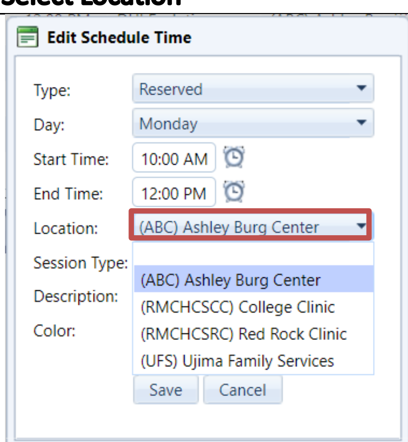
<u>Please Note in the example below:</u>

<u>Under Location</u> - I chose the Location Jane wants to reserve a spot to do MH Assessment and DUI Evals.

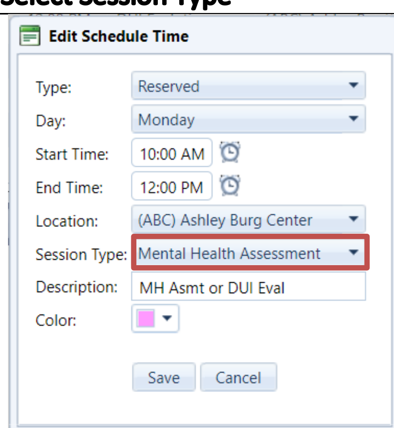
<u>Under Session Type</u> - I chose the <u>first of the two</u> session types (Mental Health Assessment) Jane wants to reserve the time slot for

<u>Under Description</u> – Type in the description of the reserved time (or just type in the session type). You can abbreviate to be more efficient. Whatever you type will appear when in Calendar View.

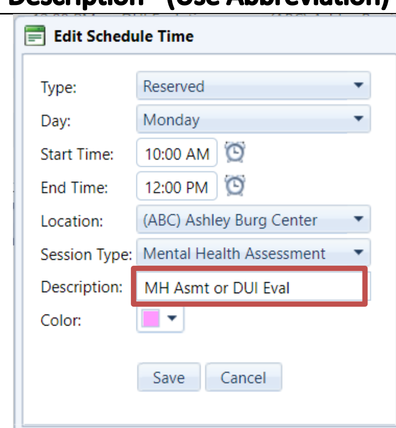
Select Location



Select Session Type



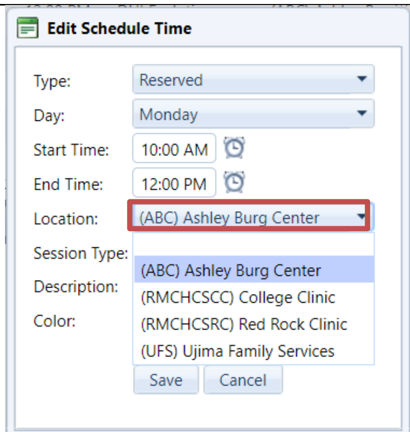
Description - (Use Abbreviation)



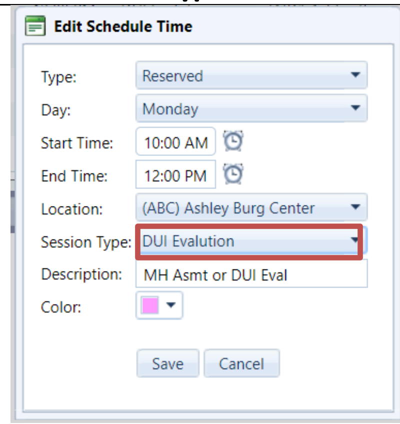
These next steps are important to display Jane's reserved times for both session types.

*****Upon creating the first reserve time, I created 1 more reserved times for Jane with the same date, time, location, description and color. However, I will select a different session type.***

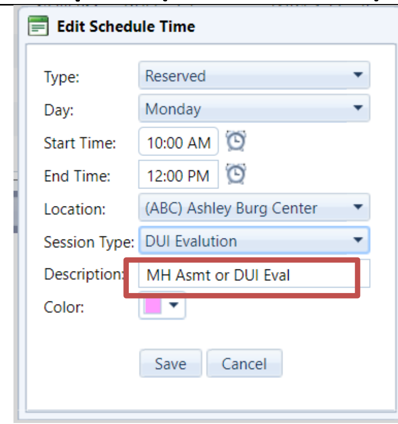
Select Location



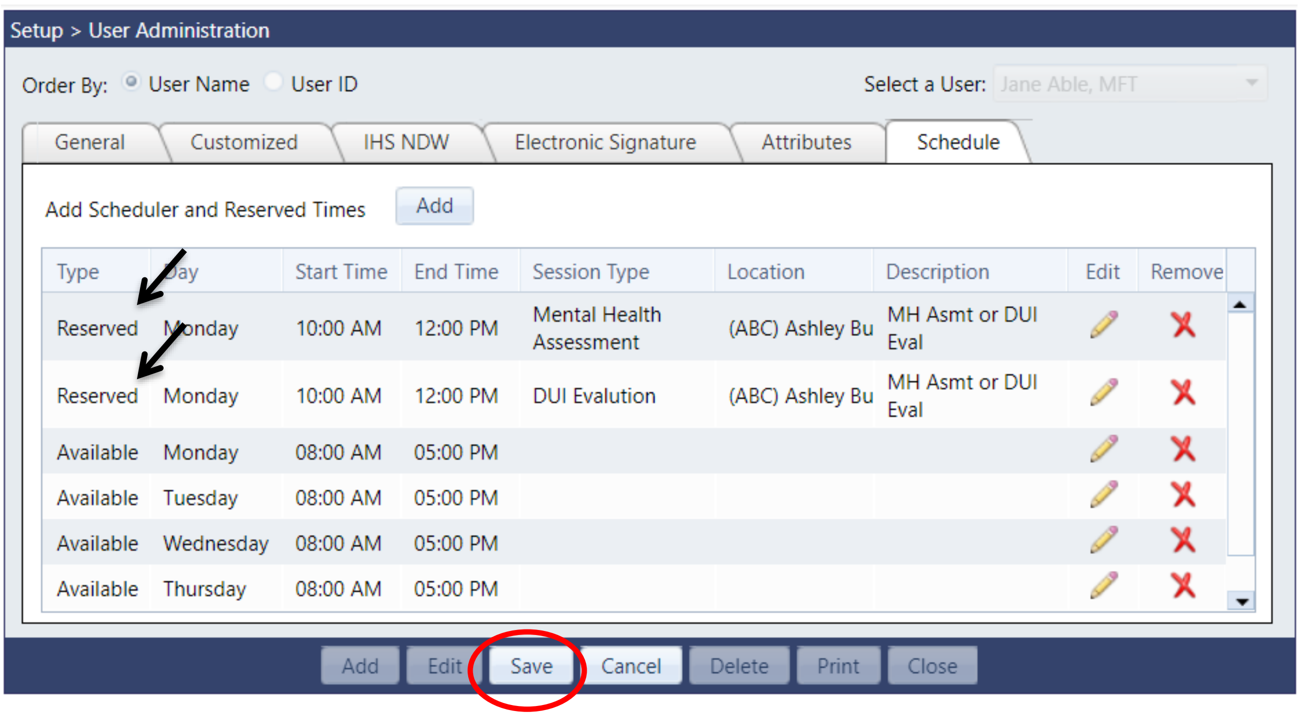
Select Session Type



Description - (Use Abbreviation)



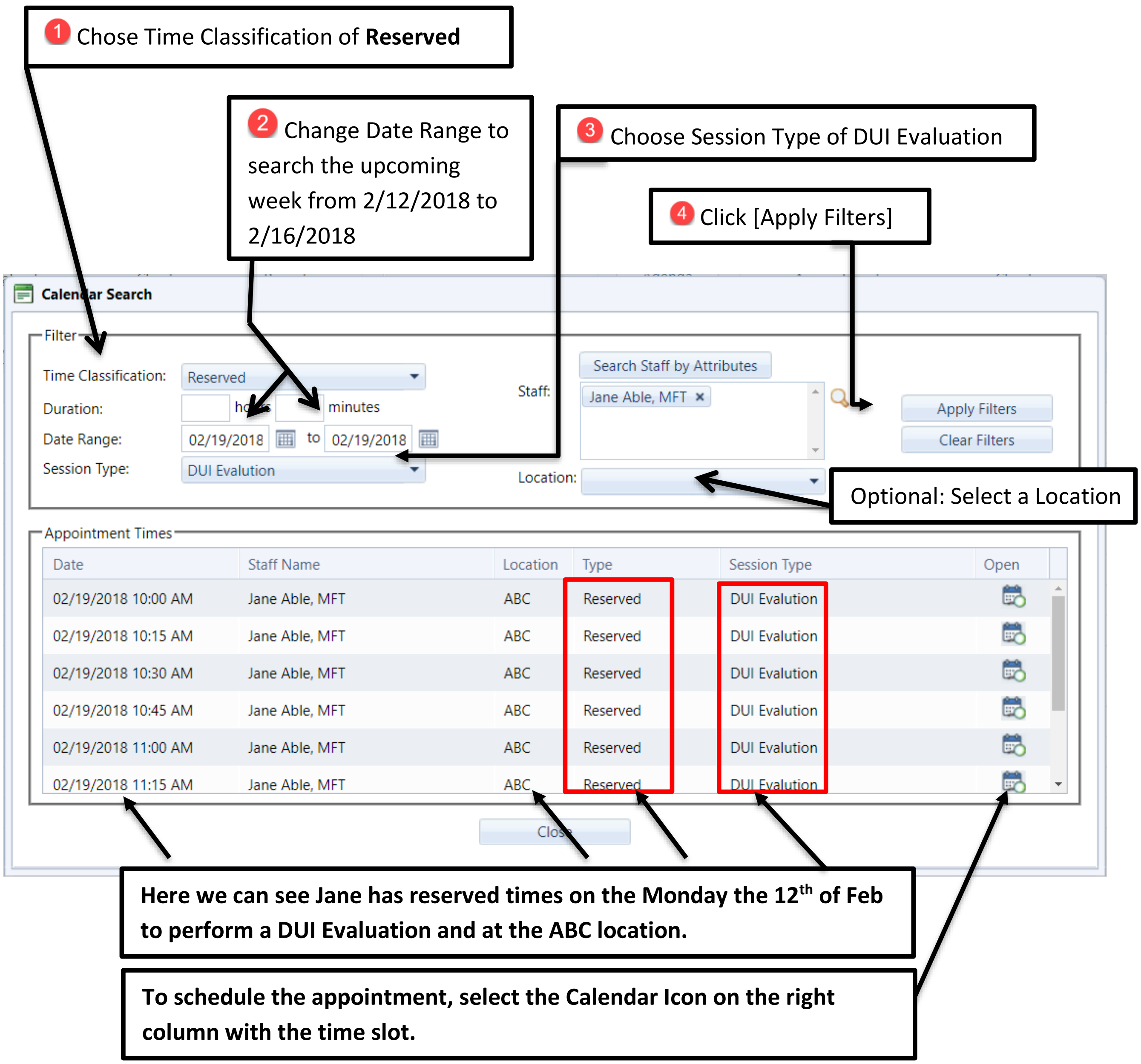
Now that all three are setup you see the same day and time but with different session types are setup and ready to be used in the scheduler. Do not forget after your review to click the [Save] button.



Calendar Search for Reserved Times

Now that we have setup Jane's reserved times, let's use the Calendar Search to search to find all her DUI Evaluations on the calendar. To accomplish this will need to use the filters in the Calendar Search Dialog box to find them.

Upon opening the Calendar search I set up the follow filters to look for Session Type DUI Evaluations.



For additional questions, contact AccuCare Support at 800-324-7966 or email support@orionhealthcare.com and we will be happy to assist you!