



Scheduler

User Guide

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Introduction –

AccuCare now has an updated Scheduler with new features to help streamline the process for agencies that wish to integrate their staff appointments with their clinical and billing workflow. Common features are built into this new version of Scheduler, with additional features such as:

- Checking in clients for appointments with different status levels
- Transferring appointment information into Progress Notes for quality assurance and efficiency
- Transferring appointment information directly into billing transaction feature
- Search for staff schedules based on custom attributes (i.e. language, credentials, etc.)

The screenshot displays the AccuCare Scheduler interface. At the top, there is a search bar and navigation icons for Staff, Calendar, Client, and Reports. A calendar for September 2015 is visible, with a 'Day' view selected. Below the calendar, there are buttons for 'Add/New', 'Appointment', 'Client', and 'Payment'. The main area shows a staff schedule for 'Paul Admin' for the month of September 2015. The schedule is organized by day of the week (Sun to Sat) and includes various appointment types such as 'Art Therapy', 'Assessment', 'Ind Session - to test Archivin', 'Anger Management', and 'Discharge'. The interface also includes a 'Staff Schedule' tab and a 'September, 2015' header. At the bottom, there are buttons for 'Appointment List' and 'Close'.

Finding Scheduler in AccuCare





Locations on where to find Scheduler in AccuCare

The screenshot displays the AccuCare EHR and Billing System interface. At the top, a ribbon contains various icons for navigation, including Profile, Intake, ASI, Scheduler, Adm/Dis, Billing, Diagnosis, Notes, TxPlans, Forms, and Chart. A callout box labeled "2nd Location- On the AccuCare Ribbon" points to the Scheduler icon in this ribbon. Below the ribbon is the main menu area, which is divided into four sections: Main, Other Tools, Clinical, and Reports. The Scheduler icon is also present in the Main section. A callout box labeled "1st Location- AccuCare Main Menu" points to this icon. The interface also includes a "Welcome, Ron Super Admin" message, "Setup" and "Log Out" links, and a "Log Out" button at the bottom right.

Scheduler Overview Introduction

Scheduler




Search

 Staff
  Calendar
  Client
  Reports

September, 2015

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

Add/New

 Appointment
  Client
  Payment

Staff Schedule

September, 2015

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Ron Clinician	30	31 Art Therapy	01 Sep	02 Anger Management	03 Intake Assessment	04 Intake Assessment	05
	06	07 Anger Management	08	09	10 Intake Assessment	11 Intake Assessment	12
	13	14 Anger Management Art Therapy	15 Group Counseling - Ange	16 Art Therapy	17 Group Counseling - Ange Intake Assessment more...	18 Intake Assessment more...	19 IOP Group Session IOP Group Session more...
	20	21 Anger Management Art Therapy more...	22 Group Counseling - Ange	23 Art Therapy	24 Group Counseling - Ange Intake Assessment more...	25 IOP Group Session	26 IOP Group Session IOP Group Session more...
	27	28 Anger Management Group Counseling - Ange	29 Group Counseling - Ange	30	01 Oct Group Counseling - Ange Group Counseling - Ange	02	03 Group Counseling - Ange

Appointment List Close

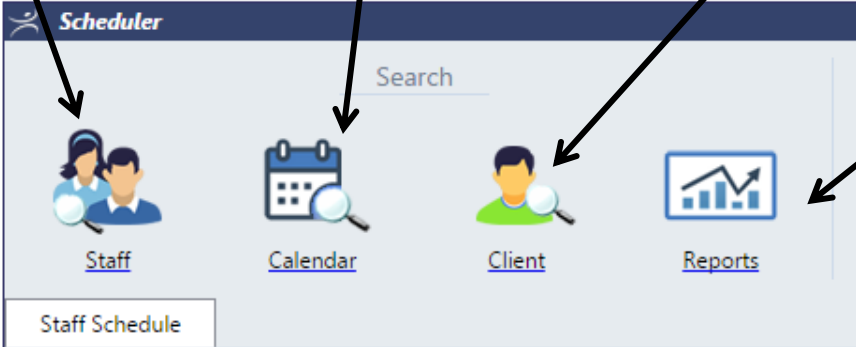
Schedule - Search Function Overview

Staff – Select other staff to see their schedule – *Level of access determines whom you can see*

Calendar – Allows you to search for an appointment using filtering dialog box

Client – Allows you to search for client's appointments. - *Level of access determines whom you can see*

Reports – Allows you run reports using filtering dialog box

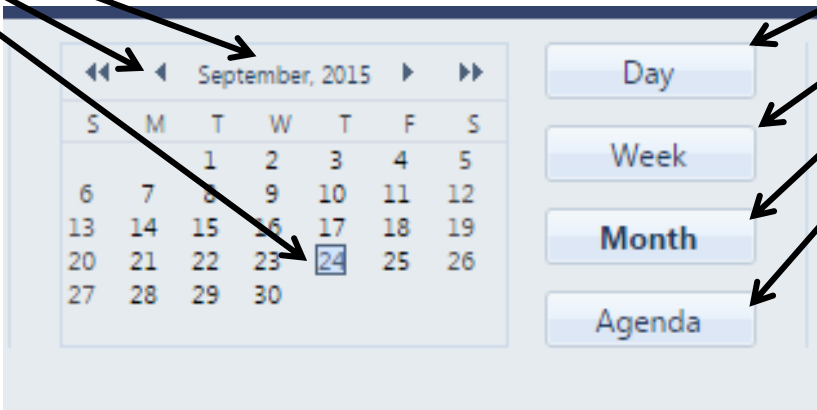


The screenshot shows the 'Scheduler' interface with a search bar and four icons: Staff (two people), Calendar (calendar with magnifying glass), Client (person with magnifying glass), and Reports (bar chart with magnifying glass). Below the icons are labels: Staff, Calendar, Client, and Reports. A 'Staff Schedule' button is visible at the bottom left.

Schedule - Calendar Function Overview

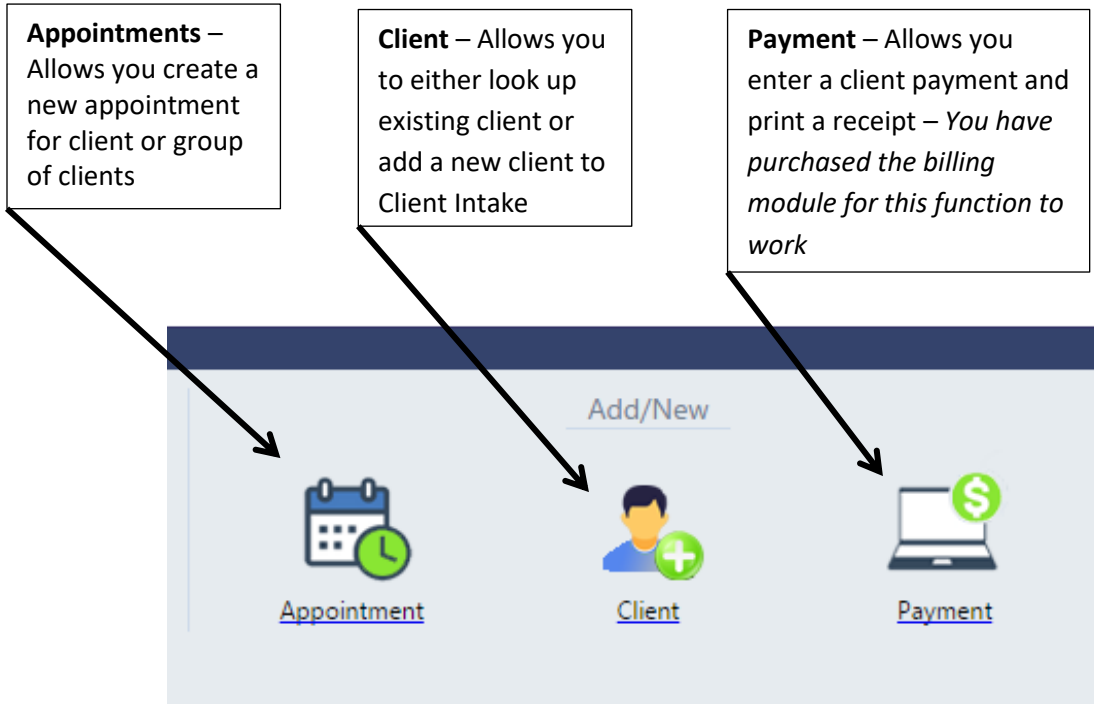
Calendar – Allows you move to a day, month or years to see appointments at those points in time.

Calendar buttons – Allows you to see a day, week, month and agenda view

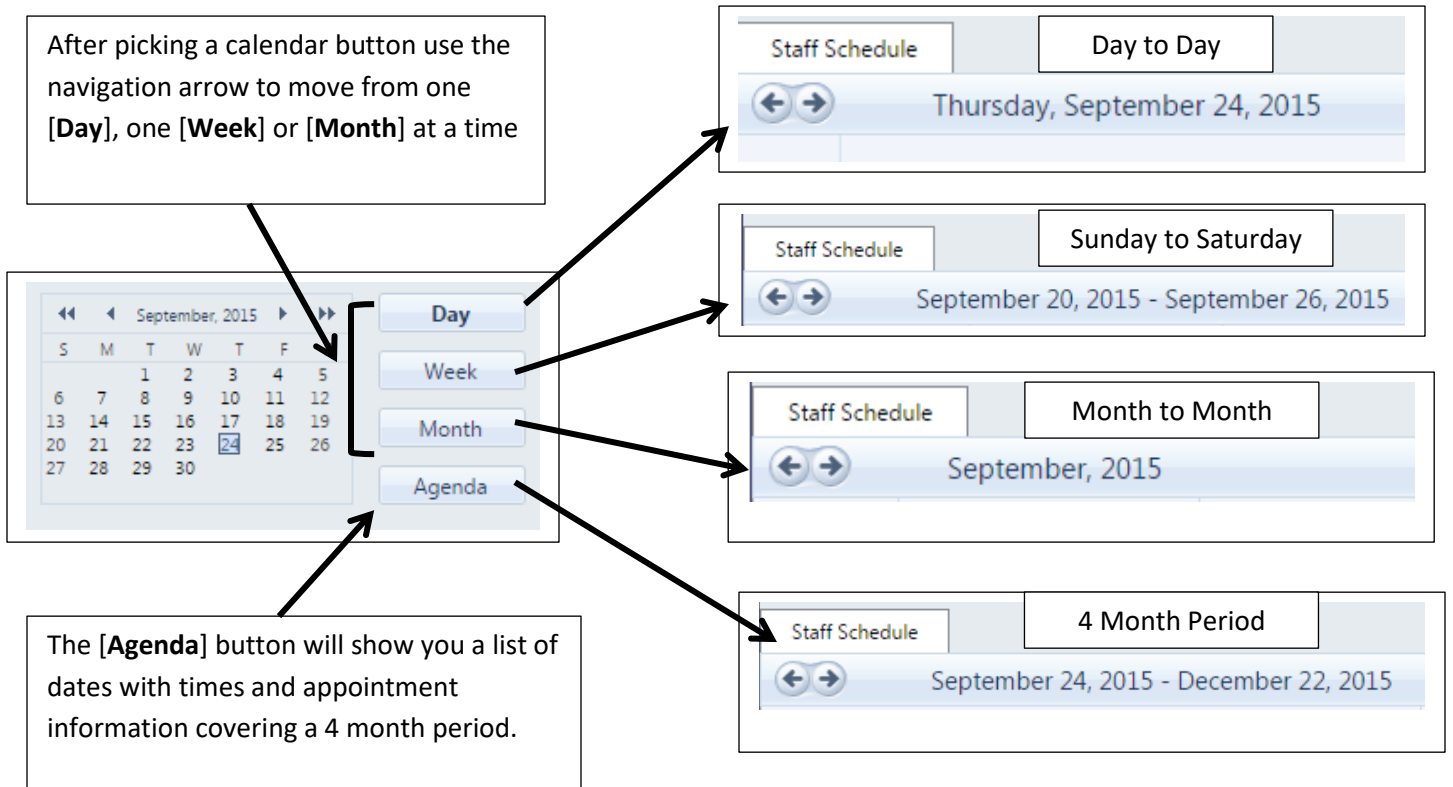


The screenshot shows a calendar for September 2015. The calendar grid has days of the week (S, M, T, W, T, F, S) and dates (1-30). The date 24 is highlighted. To the right of the calendar are four buttons: Day, Week, Month, and Agenda. Arrows point from the text boxes to the calendar and buttons.

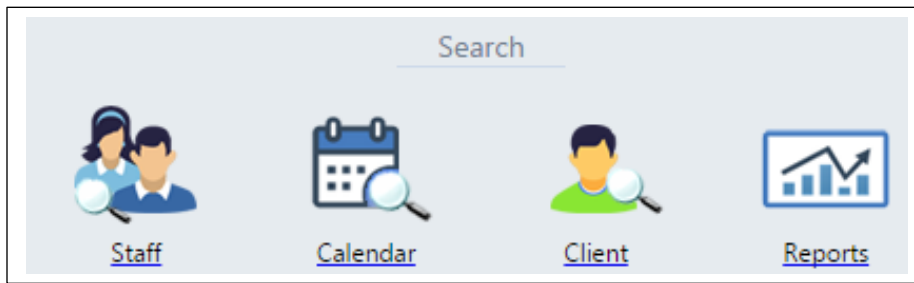
Schedule - Add/New Function Overview



Calendar Navigation arrows

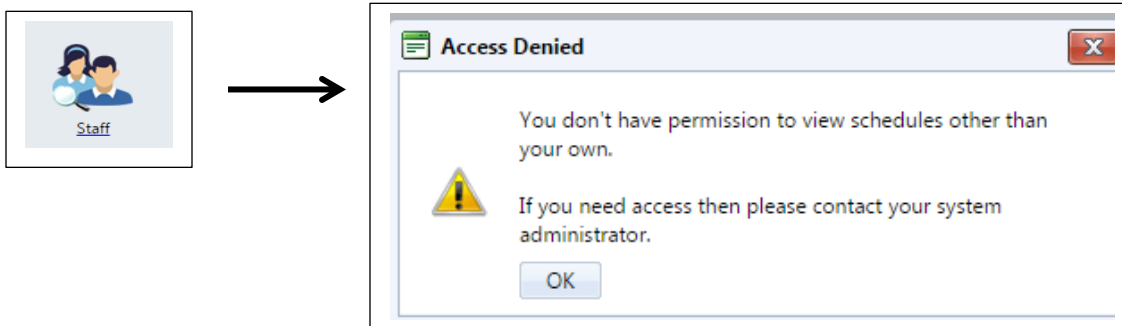


Search Functions in Detail View



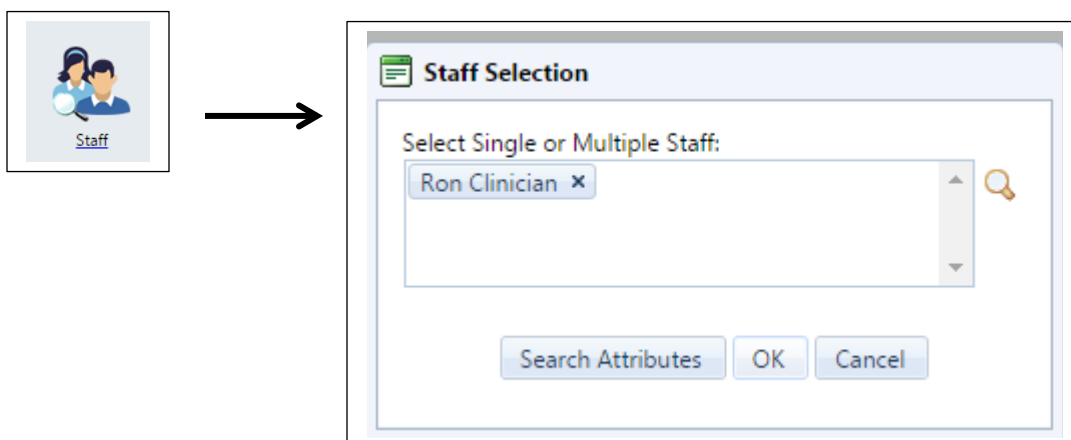
Search – Staff (View Own Schedule Only Access)

If your level of access is, clinician and you have not been given access to view all user's schedule you would be given this warning notice when you click on the Staff icon under search

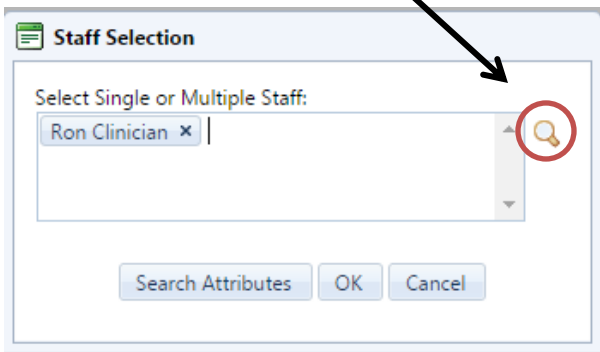


Search – Staff (View All User's Schedule Access)

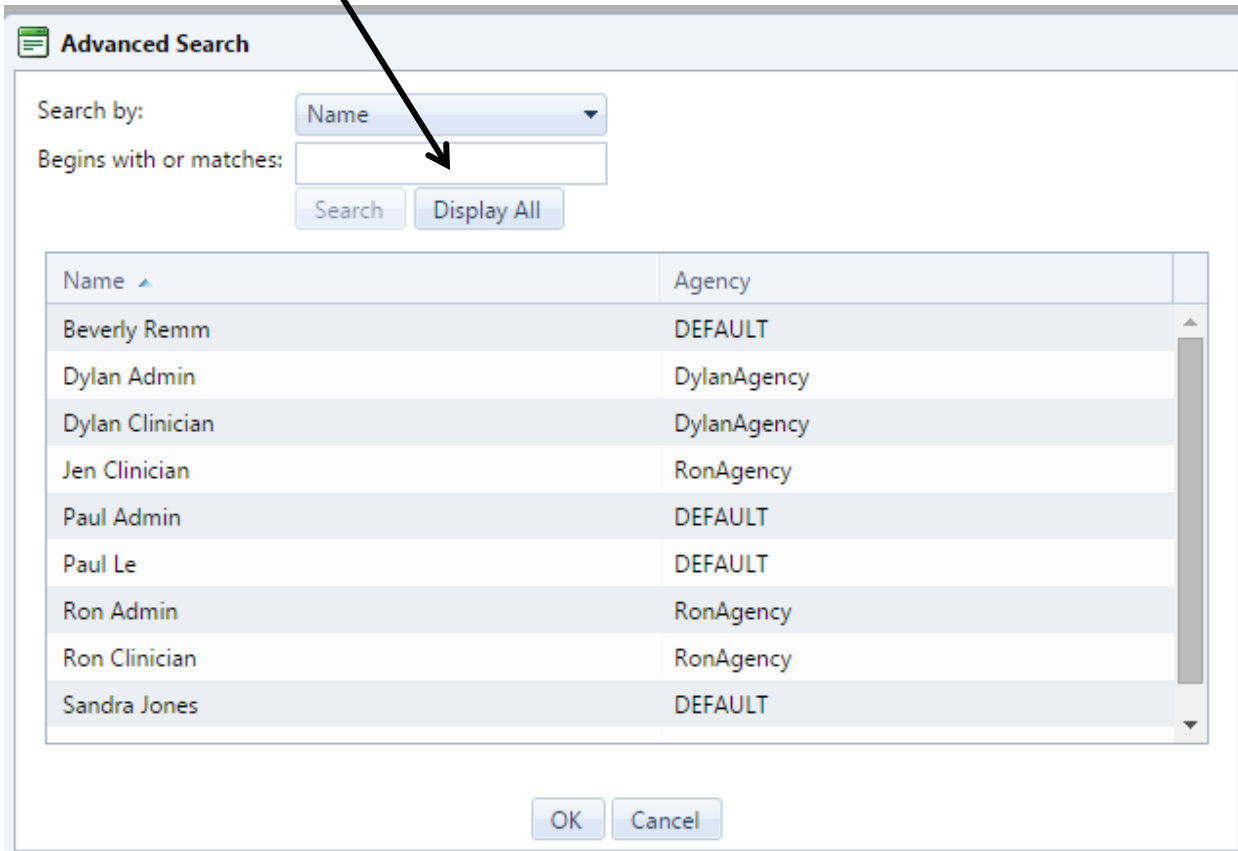
If you have been given access to view all user's schedule then you would be presented this this dialog box. This dialog box would give you the ability to view other clinician's schedule



By clicking on the spyglass, you open the Advance Search dialog box

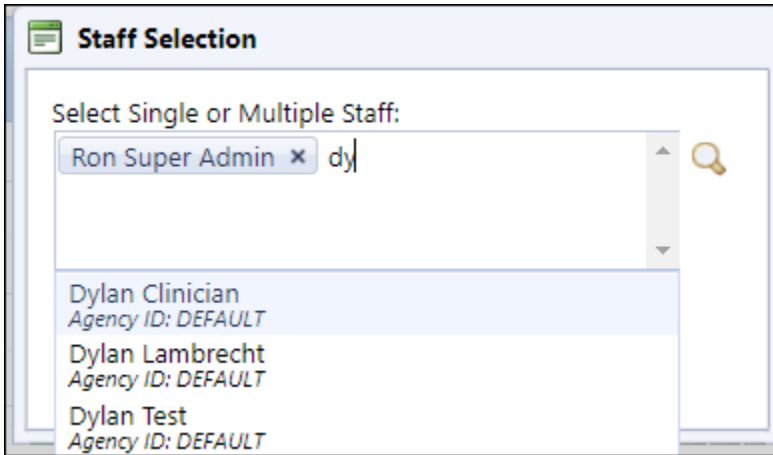


By click on the [Display All], you would be given a list of clinician in the database or you could use the search button to look up specific clinician.

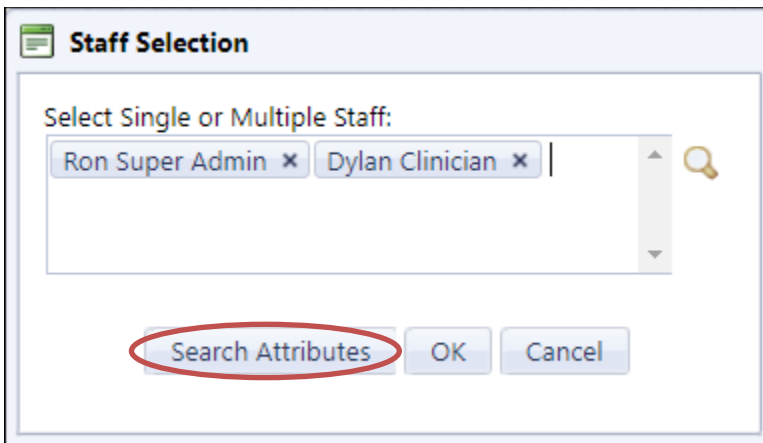


A faster way to search with this dialog box would be start typing the **first 2 letters of first name** of clinician. This would give a quick list of anyone who met these criteria.

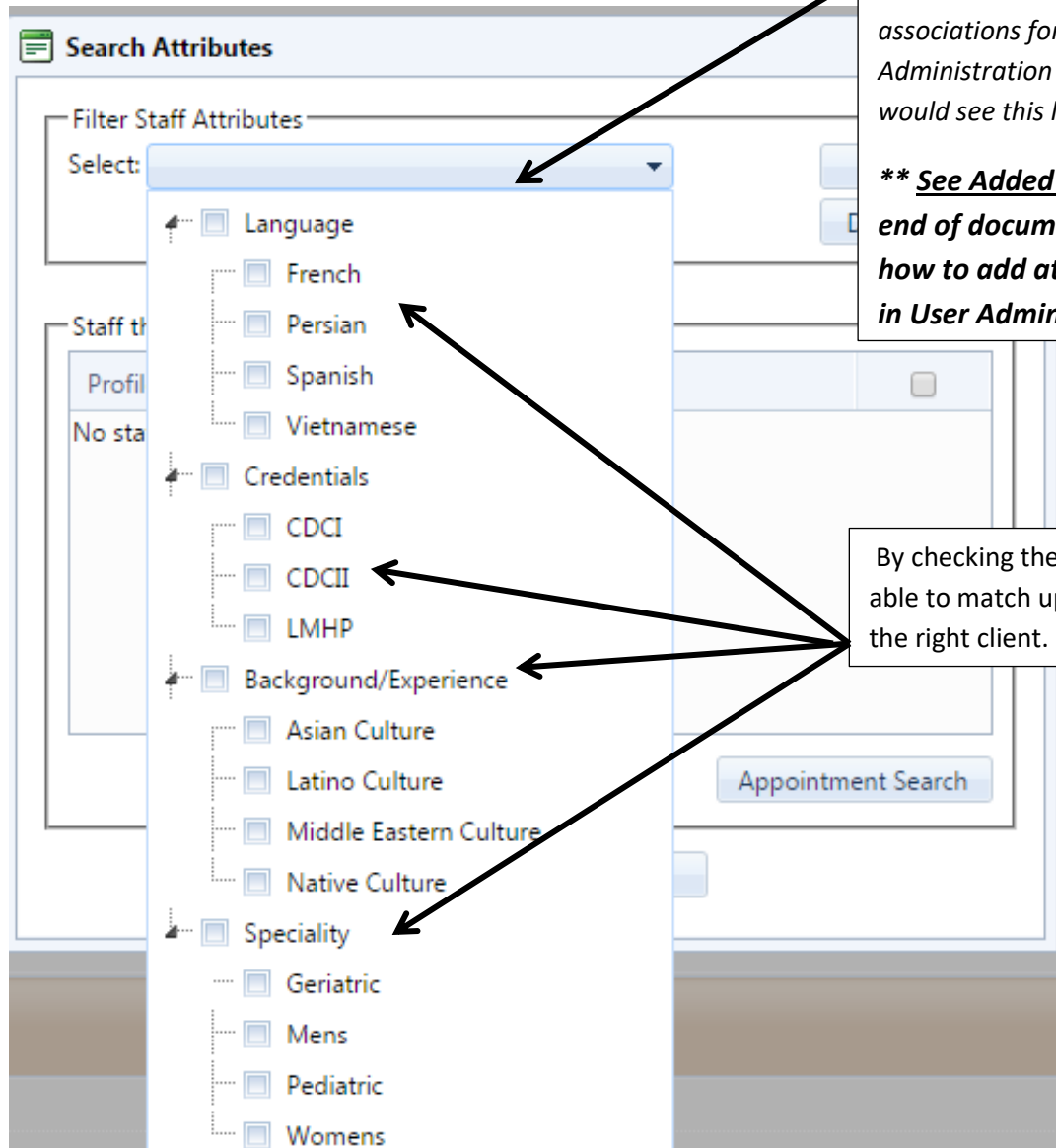
Example



The [Search Attributes] button gives another layer of find the clinician who would be the best fit for the client.



After opening the Search Attributes, click the down arrow to see list of attributes for the clinician that meet the need of you client or clients.



**** Special Note:** The Super Admin would create this list and create associations for each user in the User Administration dialog box before you would see this list.

**** See Added Reference # 1 at the end of document for instructions on how to add attributes to a clinician in User Administration.**

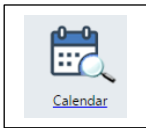
By checking the attributes, you are able to match up the right clinician to the right client.

Search - Calendar

When you click on the Calendar icon, you open the option to do a Calendar Search. This dialog box allows you to search the entire schedule using filters to narrow down your search. Simply fill your filter options and click the [Apply Filters] button to get your results.

Special Note: To receive the best results from calendar search we recommend setup both the Attributes Tab and Schedule Tab.

**** See Added References # 1 and #2 at the end of document for instructions on how to setup attributes and schedule for each clinician in User Administration Module.**



Calendar Search

Filter

Time Classification:

Duration: hours minutes

Date Range: to

Session Type:

Staff:

Location:

Appointment Times

Date	Staff Name	Location	Type	Session Type	Open
No appointment times found matching the selected filters.					

Calendar Filter Options

Time Classification: Here 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: would give you a further filter to finds times within a certain time length. For example 1 hour / 30 minutes

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

The screenshot shows a 'Calendar Search' window with the following elements:

- Filter** section containing:
 - Time Classification:** A dropdown menu currently set to 'All Times'.
 - Duration:** Two input fields for 'hours' and 'minutes'.
 - Date Range:** Two date pickers showing '02/07/2018' to '02/07/2018'.
 - Session Type:** A dropdown menu.
- Staff:** A search box with the placeholder text 'Begin typing here...' and a magnifying glass icon.
- Search Staff by Attributes:** A button located above the Staff search box.
- Location:** A dropdown menu.
- Apply Filters** and **Clear Filters** buttons on the right side.

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

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.

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

When you setup then apply your filters a list of your results are displayed under Appointment Times

Calendar Search

Filter

Time Classification: Reserved

Duration: [] hours [] minutes

Date Range: 02/07/2018 to 02/07/2018

Session Type: Group Counseling

Search Staff by Attributes

Staff: Ron Senior Clinician

Location: (AAP) Ashley Adams Place

Apply Filters

Clear Filters

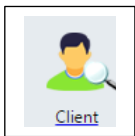
Appointment Times

Date	Staff Name	Location	Type	Session Type	Open
02/07/2018 9:00 AM	Ron Senior Clinician	AAP	Reserved	Group Counseling	
02/07/2018 9:15 AM	Ron Senior Clinician	AAP	Reserved	Group Counseling	
02/07/2018 9:30 AM	Ron Senior Clinician	AAP	Reserved	Group Counseling	

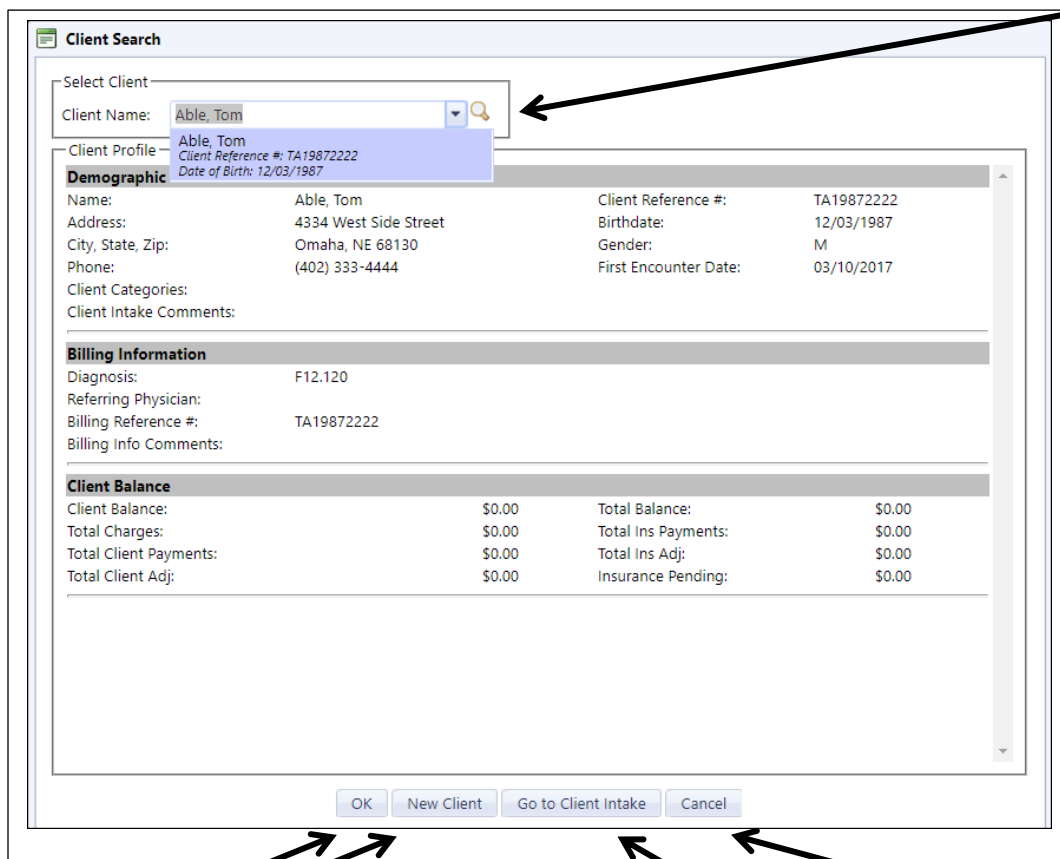
Close

Search - Client

When you click on the Client icon you given a dialog box to search for client already in the database or given an option to add a new client



Here you have given an option to search for client by entering in their name. You could use the spyglass to access the [Advance Search] dialog box



Client Balance			
Client Balance:	\$0.00	Total Balance:	\$0.00
Total Charges:	\$0.00	Total Ins Payments:	\$0.00
Total Client Payments:	\$0.00	Total Ins Adj:	\$0.00
Total Client Adj:	\$0.00	Insurance Pending:	\$0.00

[OK] button will open another tab on the scheduler to give the selected client's appointment agenda

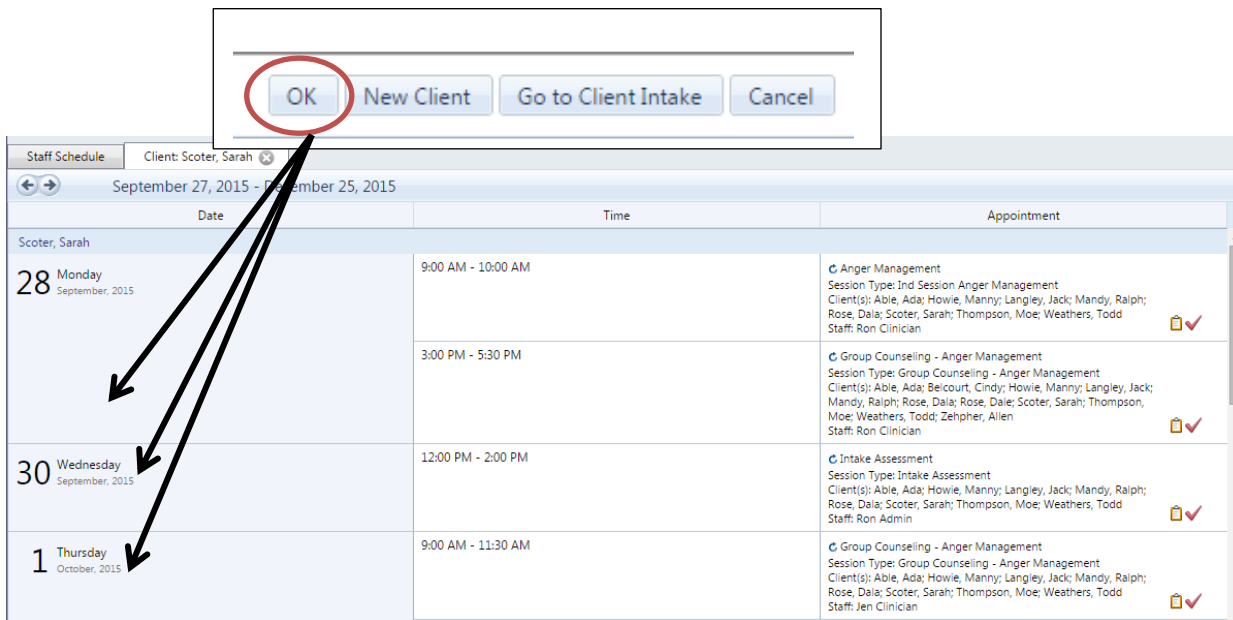
[New Client] button opens the Quick Add Client dialog box to search for existing clients or add a new client (see next page for more information)

[Go to Client Intake] button takes you to the Client Intake dialog box to search or add a new client

[Cancel] closes this dialog box and takes you back to the schedule view

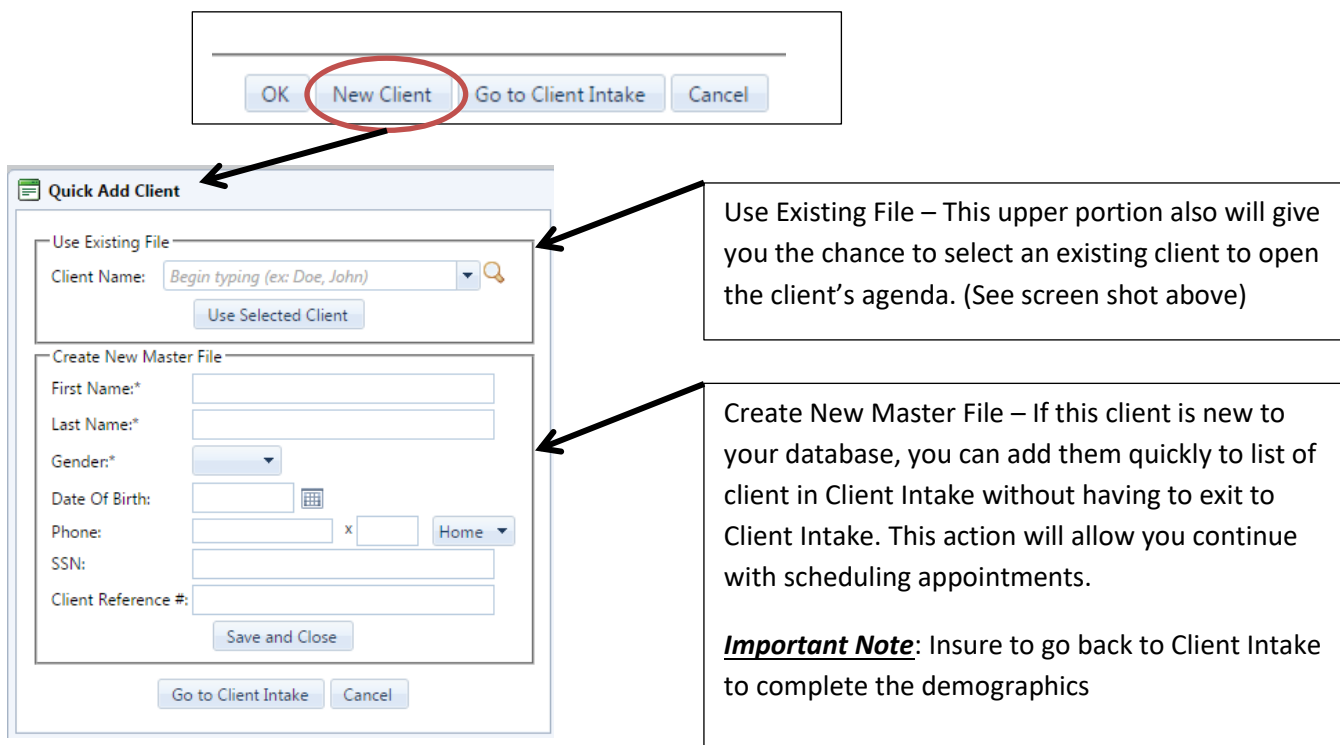
Client Search – [OK] Button

After selecting a client in your client search click on the [OK] button, this will give you a view of this client’s agenda



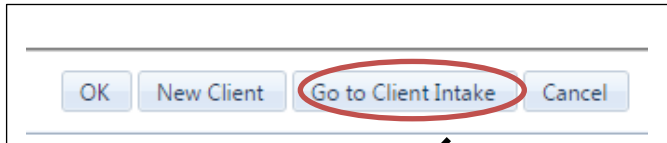
Client Search – [New Client] Button

This will open the Quick Add Client dialog box



Client Search – [Go to Client Intake] Button

This exits the Scheduler and opens the Client Intake Administration dialog box. You can add either a new client or lookup an existing client.



Client Intake

Search by: Last Name Date Of Birth Phone SSN Client Reference # Billing Reference #

Begins with or matches: Search Display All

Client Name: Able, Tom
Level of Care: Level III.3 Monitored inpatient
Location: (ABCT) ABC Treatment

Name	DOB	Phone	SSN	Client Ref #	Billing Ref #
Able, Tom	12/03/1987	(402) 333-4444	232-32-2222	TA19872222	TA19872222

Demographics Case Management Billing Payers Fee Schedule Referrals AI/AN Custom Forms Multi-Dimensional Assessment Comments

Edit

Main

Client Name: Able, Tom **First Encounter Date:** 03/10/2017
Nickname: **Marital Status:** Married
Date of Birth: 12/03/1987 **Work Status:** Full-time (35 hrs+/wk)
Gender: Male **Race:** White (Not of Hispanic Origin)
Social Security #: 232-32-2222 **Religion:** Protestant
Client Reference #: TA19872222 **Ethnic Group:**

Contact Information

Address: 4334 West Side Street **Phone 1:** (402) 333-4444 - Home
Omaha, NE 68130 **Phone 2:**
Phone 3:
Email:
Emergency Contact: **Phone:**

Military

Military Status: Missing Data **Family Members with Military Background:** Missing Data
Military Branch: Not Applicable **Number of Family Members in Military:**

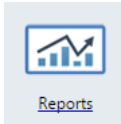
Additional

Privacy Agreement Signed: No **Archived:** No

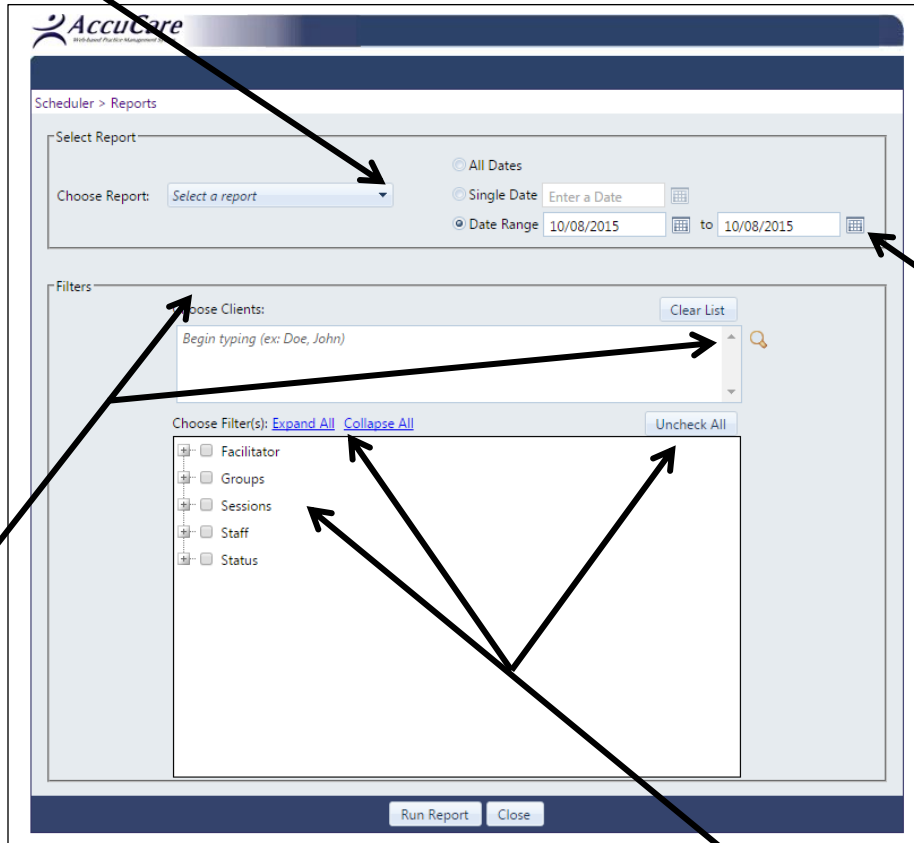
Add New Client Delete Client Print File and Sign Referral Source Setup Export Close

Search – Reports

The Reports Button has a multitude of options and filters to pull the reports you need from your schedule. Start with the Report you want then continue with the rest of the filter.



1st Choose Report- When you click on the drop down arrow, you will be giving a list of report you can pull from the scheduler. ***See next page for list of reports.***



To narrow or increase your search we give the option to select a date range or multiple days.

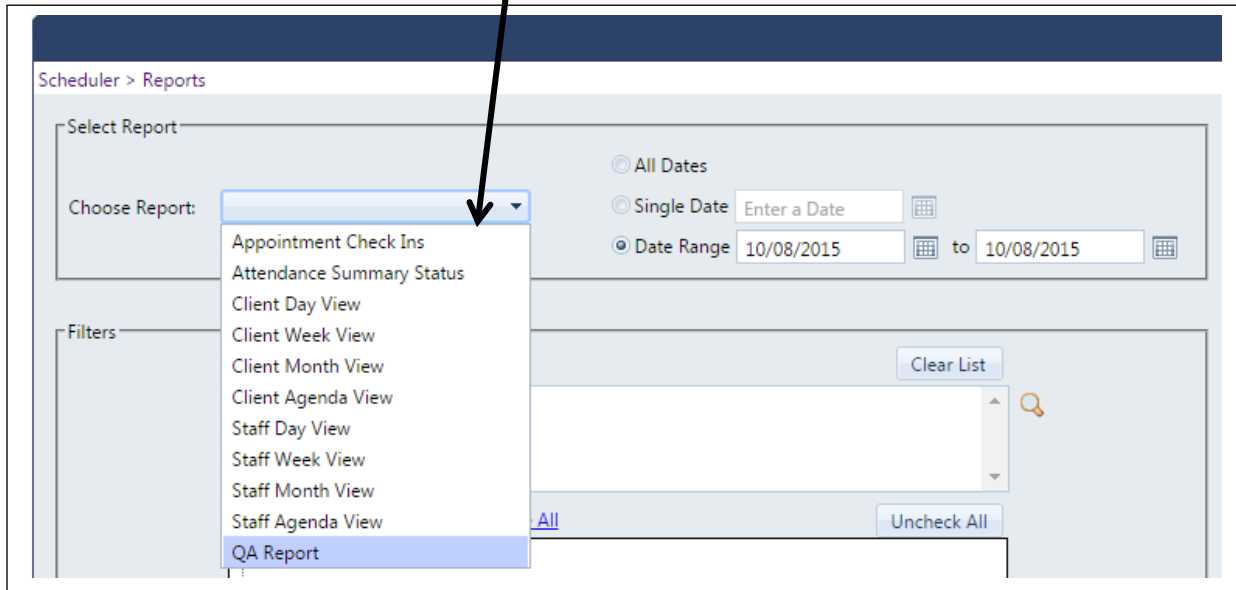
Note: The default date is set for today date

3rd Choose Clients- This has the same functionality as other areas within the scheduler. You can either start typing in the name of your clients or use the spyglass to bring up the advanced search dialog box

4th Choose Filters – Check the filters that apply to search and report selected. You can expand and collapse your list then check all that apply. To reset your check box click on the [Uncheck All] button

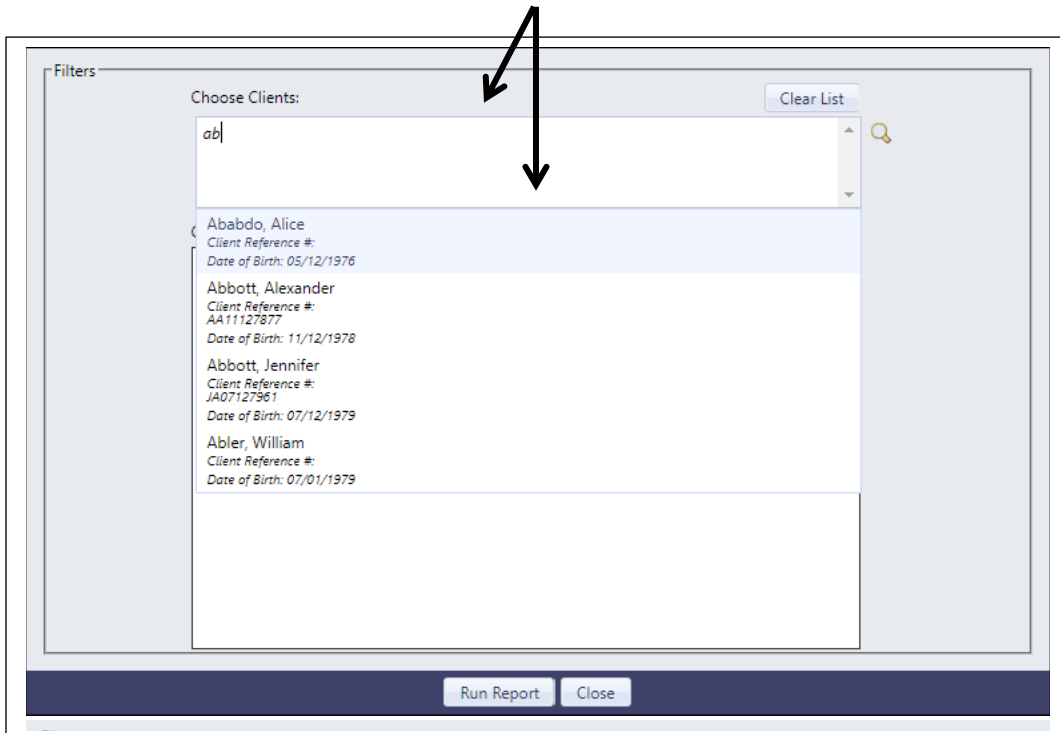
Select Report

Here is the list of Scheduler reports you can run after you have set your filters.



Filters – Choose Clients

Under the filters section all you need to do is begin typing 2 letters of the client's last name. In this example, I typed the letter (ab) which gives me a list of clients whose name begins with the letters (ab).



Filters – Choose Filter(s)

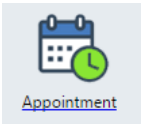
After choosing your Clients, you are given the opportunity to filter your output by Facilitator, Group, Sessions, Staff and Status. In this example, I choose Status → Attended

The screenshot shows a 'Filters' dialog box. At the top, there's a 'Choose Clients' section with a search bar and a 'Clear List' button. Below it, three client names are listed: 'Scoter, Sarah', 'John, Applebee', and 'Able, Ada'. Underneath is a 'Choose Filter(s)' section with 'Expand All' and 'Collapse All' links, and an 'Uncheck All' button. A tree view shows the following filters: Facilitator, Groups, Sessions, Staff, and Status. The 'Status' filter is expanded, and 'Attended' is checked. Other status options include Canceled, Confirmed, Left Message, No Show, Office Canceled, and Rescheduled. At the bottom of the dialog are 'Run Report' and 'Close' buttons.

Here is sample of the report create from selections.

Appointment Check-Ins 09/01/2015 - 10/08/2015						
Client	Date	Status	Event	Facilitator	Session	Group
Able, Ada	09/21/2015 9:00 AM to 10:00 AM	Attended	Anger Management	Ron Clinician	Ind Session Anger Management	
Able, Ada	09/19/2015 10:00 AM to 11:00 AM	Attended	IOP Group Session	Sandra Jones	IOP Group Session	
Able, Ada	09/17/2015 3:00 PM to 5:30 PM	Attended	Group Counseling - Anger Management	Ron Clinician	Group Counseling - Anger Management	
Able, Ada	09/17/2015 10:00 AM to 11:00 AM	Attended	IOP Group Session	Sandra Jones	IOP Group Session	
Able, Ada	09/17/2015 9:00 AM to 10:00 AM	Attended	Group Counseling - Anger Management	Ron Clinician	Group Counseling - Anger Management	
Able, Ada	09/17/2015 9:00 AM to 11:30 AM	Attended	Group Counseling - Anger Management	Jen Clinician	Group Counseling - Anger Management	
Able, Ada	09/14/2015 12:00 PM to 1:00 PM	Attended	Art Therapy	Ron Clinician	Art Therapy	
John, Applebee	09/14/2015 9:00 AM to 10:00 AM	Attended	Assessment	Staff		
Able, Ada	09/14/2015 9:00 AM to 10:00 AM	Attended	Anger Management	Ron Clinician	Ind Session Anger Management	
Able, Ada	09/14/2015 1:00 AM to 3:00 AM	Attended	General	Staff	General	
Able, Ada	09/09/2015 12:00 PM to 2:00 PM	Attended	Intake Assessment	Ron Admin	Intake Assessment	
Able, Ada	09/07/2015 9:00 AM to 10:00 AM	Attended	Anger Management	Ron Clinician	Ind Session Anger Management	
Scoter, Sarah	09/07/2015 9:00 AM to 10:00 AM	Attended	Anger Management	Ron Clinician	Ind Session Anger Management	
Scoter, Sarah	09/03/2015 6:00 PM to 7:00 PM	Attended	Ind Session - to test Archiving	Paul Admin	Ind Session - to test Archiving (Archived)	

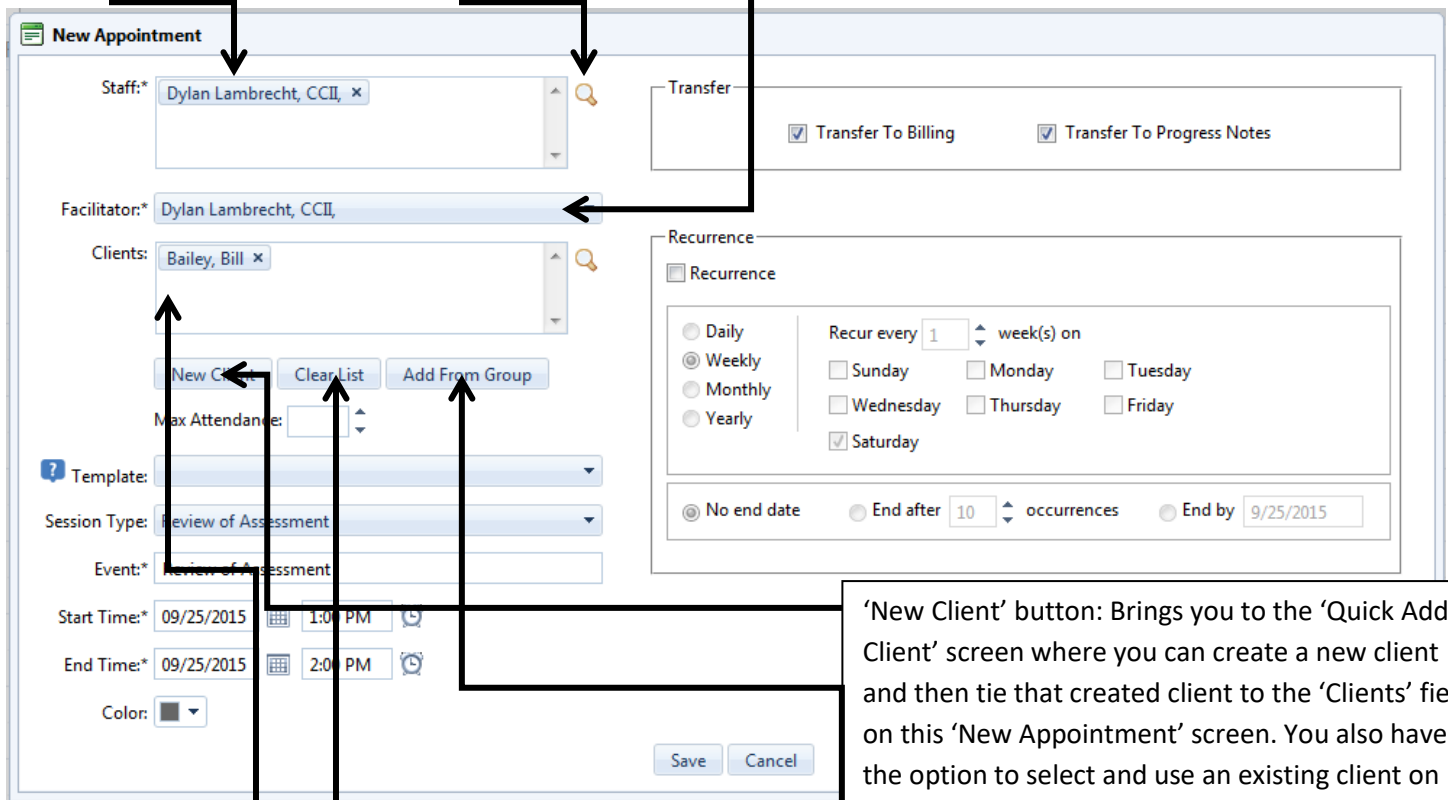
Add/New - Appointments



After selecting the above 'Appointment' icon, you will be brought to the below page:

The 'Staff' field allows you to either free type the first few letters of the staff member's last name or you can select the magnifying glass to do an advanced search and find the staff member.

The 'Facilitator' drop down allows you to select the organizer for the appointment or main staff member for the appointment. These names are populated by the staff members entered directly above this drop down.



The screenshot shows the 'New Appointment' form with the following fields and buttons:

- Staff:** A text input field containing 'Dylan Lambrecht, CCI, ' with a magnifying glass icon to its right.
- Facilitator:** A dropdown menu showing 'Dylan Lambrecht, CCI,'.
- Clients:** A text input field containing 'Bailey, Bill ' with a magnifying glass icon to its right.
- Buttons:** 'New Client', 'Clear List', and 'Add From Group' are located below the Clients field.
- Max Attendance:** A numeric input field.
- Template:** A dropdown menu.
- Session Type:** A dropdown menu showing 'Review of Assessment'.
- Event:** A text input field containing 'Review of Assessment'.
- Start Time:** A date and time picker showing '09/25/2015 1:00 PM'.
- End Time:** A date and time picker showing '09/25/2015 2:00 PM'.
- Color:** A color selection dropdown.
- Transfer:** A section with two checked checkboxes: 'Transfer To Billing' and 'Transfer To Progress Notes'.
- Recurrence:** A section with a 'Recurrence' checkbox, radio buttons for 'Daily', 'Weekly', 'Monthly', and 'Yearly', a 'Recur every 1 week(s) on' section with checkboxes for days of the week (Saturday is checked), and options for 'No end date', 'End after 10 occurrences', and 'End by 9/25/2015'.
- Buttons:** 'Save' and 'Cancel' are at the bottom right.

The 'Clients' field allows you to either free type the first few letters of the client's last name or you can select the magnifying glass to do an advanced search and find the staff member.

'New Client' button: Brings you to the 'Quick Add Client' screen where you can create a new client and then tie that created client to the 'Clients' field on this 'New Appointment' screen. You also have the option to select and use an existing client on the 'Quick Add Client' screen.

'Clear List' button: Clears all clients from the 'Clients' field directly above this button.

'Add From Group' button: Allows you to add a particular client or clients from a specific group to the 'Clients' field above this button.

The 'Max Attendance' field allows you to select the max amount of clients that are part of an appointment. This works in conjunction with the 'Scheduler Templates' allowing you to limit attendees. For example, if you input a value of 2 in 'Max Attendance' and add 3 clients you will get a message stating you have exceeded the max amount of attendees. The message will then allow you to continue adding or cancel.

The 'Template' dropdown lets you select a template that you have already created. Creating and selecting a template is useful because when you select a template it will pre-fill certain fields in such as Session Type, Event Name, end-time based on duration value, color, max attendance, and toggles for Transfer To Billing and Transfer to Progress Notes.

The screenshot shows the 'New Appointment' form with the following fields and callouts:

- Staff:** Dylan Lambrecht, CCII
- Facilitator:** Dylan Lambrecht, CCII
- Clients:** Bailey, Bill
- Buttons:** New Client, Clear List, Add From Group
- Max Attendance:** A numeric input field with up/down arrows.
- Template:** A dropdown menu.
- Session Type:** Review of Assessment
- Event:** Review of Assessment
- Start Time:** 09/25/2015 1:00 PM
- End Time:** 09/25/2015 2:00 PM
- Color:** A color selection dropdown.
- Transfer:** Checkboxes for Transfer To Billing and Transfer To Progress Notes.
- Recurrence:** Radio buttons for Daily, Weekly, Monthly, Yearly; a 'Recur every' field (set to 1 week(s)); and checkboxes for days of the week (Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday).
- End Options:** Radio buttons for No end date, End after (10 occurrences), and End by (9/25/2015).
- Buttons:** Save, Cancel

Callout boxes are connected to the 'Max Attendance' field, the 'Template' dropdown, the 'Session Type' dropdown, and the 'Event' field.

The 'Session Type' dropdown is where you would select the session type that is used when you transfer client check-ins from this appointment to progress notes. Session Types are used when creating progress notes and creating new scheduler appointments.

The 'Event' field pre-fills in whatever the session type description is for the appointment. You have the option of changing the event name to whatever you would like. It is a required field.

The 'Start Time/End Time' fields are where you would enter the dates and times for this appointment. If you setup a recurrence then this same time will be used.

The 'Color' dropdown lets you select a color for this appointment or the series of this appointment. This will display a special color for this appointment on the main scheduler screen.

The screenshot shows the 'New Appointment' form with the following fields and callouts:

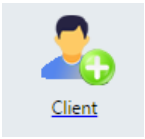
- Staff:** Dylan Lambrecht, CCII, ×
- Facilitator:** Dylan Lambrecht, CCII
- Clients:** Bailey, bin ×
- Buttons:** New Client, Clear List, Add From Group
- Max Attendance:** [input field]
- Template:** [dropdown menu]
- Session Type:** Review of Assessment
- Event:** Review of Assessment
- Start Time:** 09/25/2015 1:00 PM
- End Time:** 09/25/2015 2:00 PM
- Color:** [dropdown menu]
- Transfer:**
 - Transfer To Billing
 - Transfer To Progress Notes
- Recurrence:**
 - Recurrence
 - Daily
 - Weekly
 - Monthly
 - Yearly
 - Recur every 1 week() on
 - Sunday Monday Tuesday
 - Wednesday Thursday Friday
 - Saturday
 - No end date End after 10 occurrences End by 9/25/2015
- Buttons:** Save, Cancel

The 'Transfer To Billing' and 'Transfer To Progress Notes' checkboxes control whether or not the check ins for this appointment will be transferred to either the billing or progress notes areas of AccuCare. Un-checking these boxes will default in NOT to send the check-ins for this appointment to those modules.

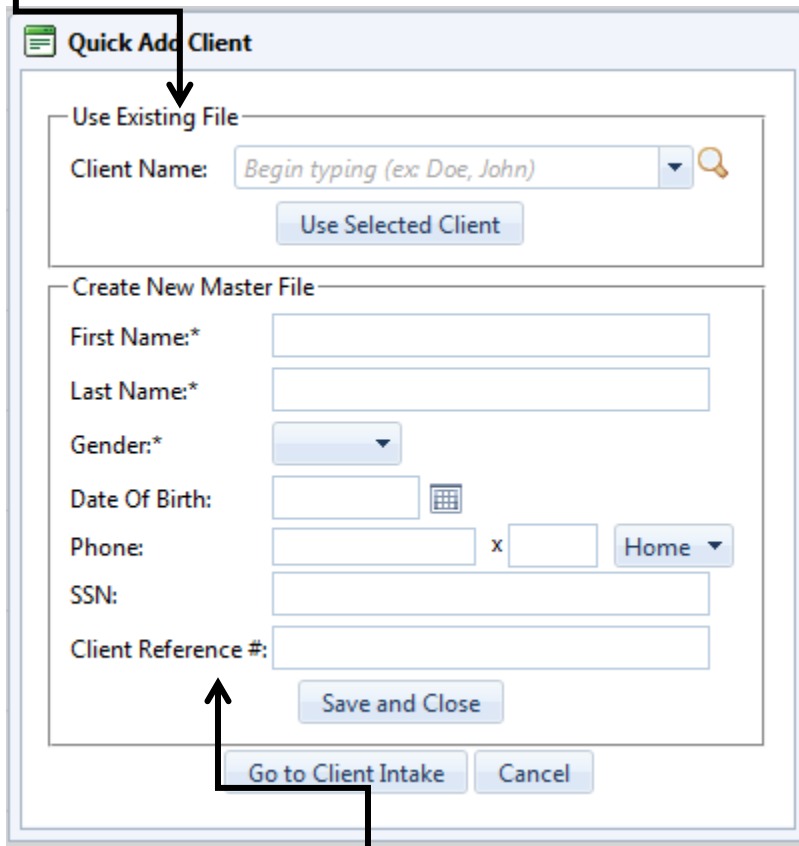
The 'Recurrence' area lets you set this appointment up to be a recurring appointment. You have the option of having this appointment recur daily, weekly, monthly, or yearly. To begin, you would select the 'Recurrence' checkbox and then select how you would like this appointment to recur. At the bottom of this area, you have the option of deciding when you want the recurrence to end for this series of appointments.

The 'Save' button will save the appointment and add this appointment to the calendar if all the fields have been entered correctly. Cancel will discard any changes.

Add/New - Client

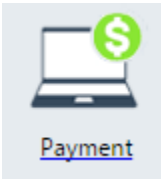


The 'Quick Add Client' screen is opened by selecting the 'Client' link under the 'Add/New' area. This area has two parts. If you search or begin typing a client's name under 'Use Existing File' you can then select 'Use Selected Client' button and essentially pull up that client's appointment within 'Agenda View'.

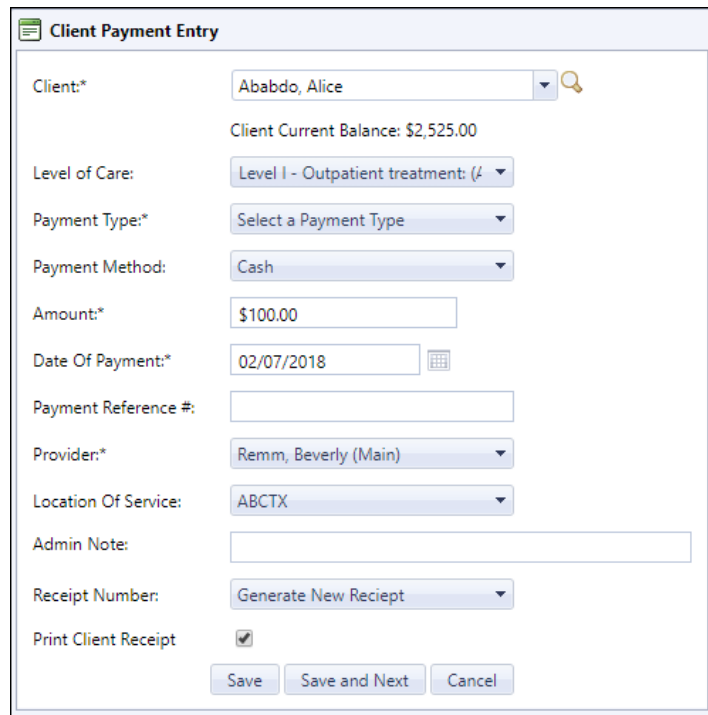


The 'Create New Master File' area allows you to quickly create a new client to be added to the 'Client Intake' area of AccuCare. You would enter the client details and then select the 'Save and Close' button. Prior to creating the client it is best practice to first select the 'Go to Client Intake' button to first search to make sure the client is not already entered in the database.


Add/New - Payments



The 'Client Payment Entry' screen is opened by selecting the 'Payment' link under the 'Add/New' area. This screen is an easy way to take a customer payment and have those payment details recorded within the 'Billing Transfer' module. From this screen, you also have the option of printing a client receipt while also saving the record within AccuCare. To be able to utilize this functionality you would need to have subscribed to our billing module. Next, you would need to setup a service within the billing services screen that has a transaction type of 'Customer Payment'. Lastly, you would need to set up a provider or providers under the billing provider info screen. Optionally you can set up location of services as well as that information is also gathered from this screen. Once this is done you can navigate to this screen and enter the necessary fields to record a payment and select either 'Save' or 'Save and Next'. 'Save and Next' will save the transaction to the 'Billing Transfer' area of AccuCare but will then allow you to enter a new customer payment by clearing the fields.



Client Payment Entry


Client:* Ababdo, Alice 
Client Current Balance: \$2,525.00

Level of Care: Level I - Outpatient treatment: (4) ▾

Payment Type:* Select a Payment Type ▾

Payment Method: Cash ▾

Amount:* \$100.00

Date Of Payment:* 02/07/2018 

Payment Reference #:

Provider:* Remm, Beverly (Main) ▾

Location Of Service: ABCTX ▾

Admin Note:

Receipt Number: Generate New Receipt ▾

Print Client Receipt

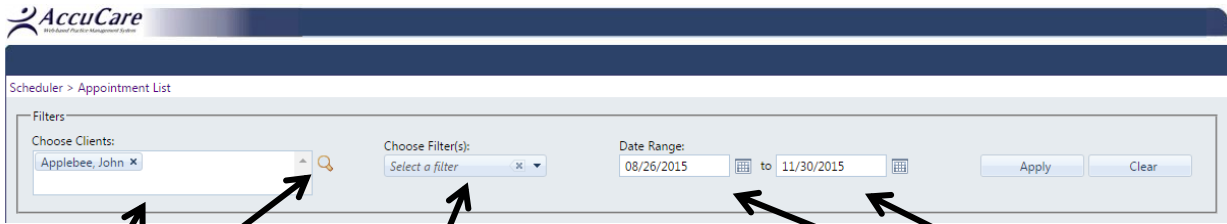
Appointment List Button

Appointment List button allows you search client appointments using filters and date ranges

The screenshot displays the Scheduler application interface. At the top, there is a navigation bar with the title "Scheduler" and a "Search" section. Below the search bar are icons for "Staff", "Calendar", "Client", and "Reports". To the right of these icons is a calendar for February 2018, with the 7th of February highlighted. Further right are buttons for "Day", "Week", "Month", and "Agenda". On the far right of the top bar is an "Add/New" section with icons for "Appointment", "Client", and "Payment".

The main area of the interface is titled "Staff Schedule" and shows a schedule for "Wednesday, February 07, 2018" for "Ron Super Admin". The schedule is presented as a grid with time slots from 8 am to 7 pm. The grid is currently empty. At the bottom of the interface, there are three buttons: "Appointment List", "Custom Forms", and "Close". A black arrow points from the top left towards the "Appointment List" button.

Appointment Filters - overview

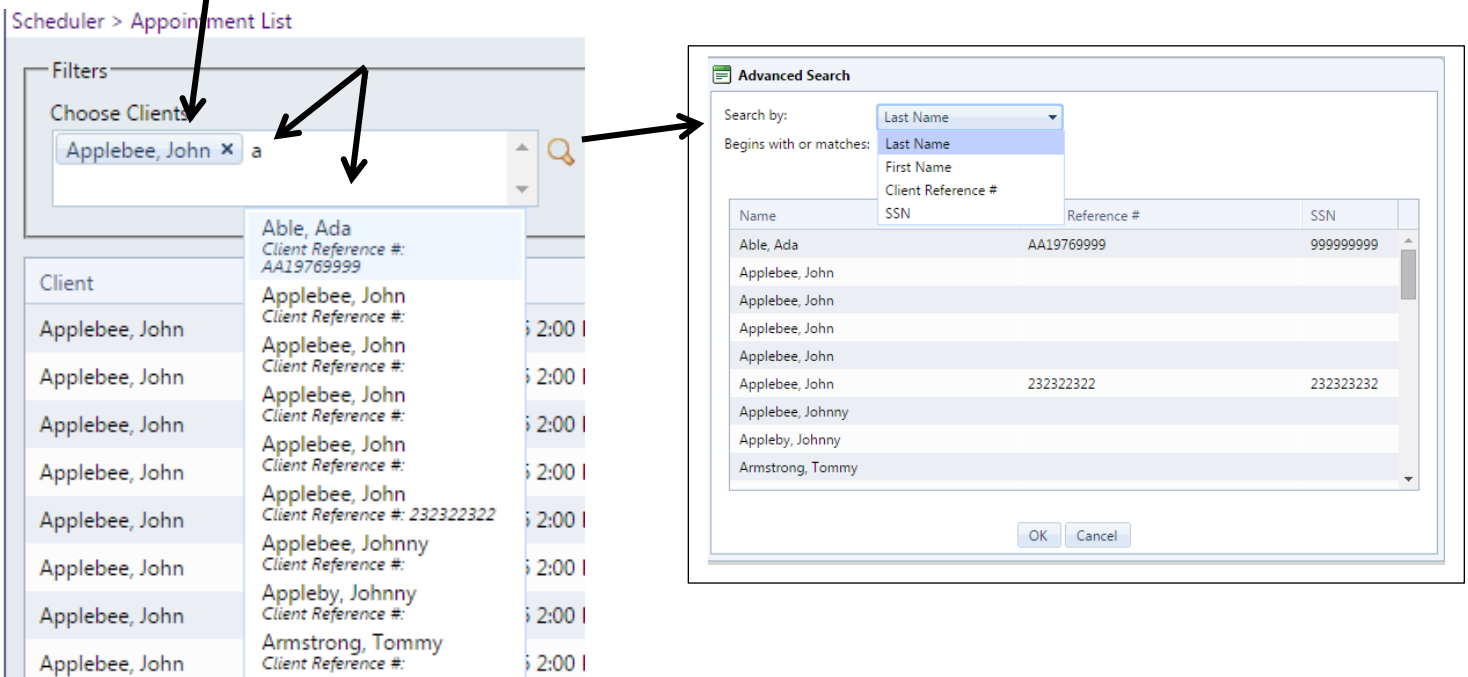


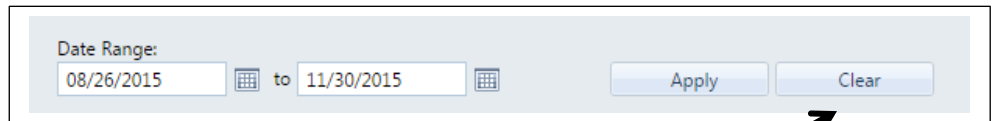
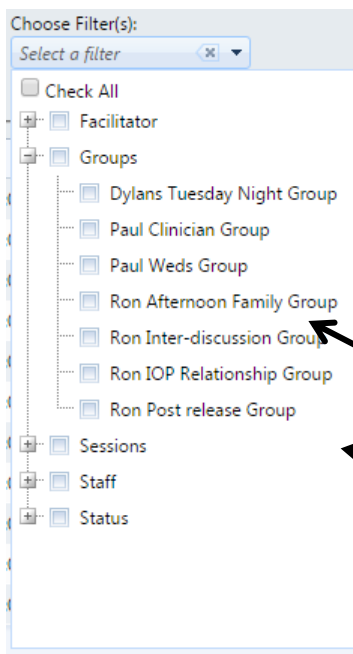
Choose Filters will further sort your search to look for specific conditions

Choose you client or clients using this part of the filter. You can type in the name of client or use the spyglass to search by last name, first name, Client Ref# or SSN.

Date Range defaults to today date but can change to encompass a date range of couple of days to weeks to months.

Either start typing in the name of client or use the spyglass to search for the client





Put in you date range then click the [Apply] button
To make a new selections click on [Clear] button

Additional filters have been added to help narrow you search when look for a client appoints

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