Scheduler

User Guide

Created By Orion

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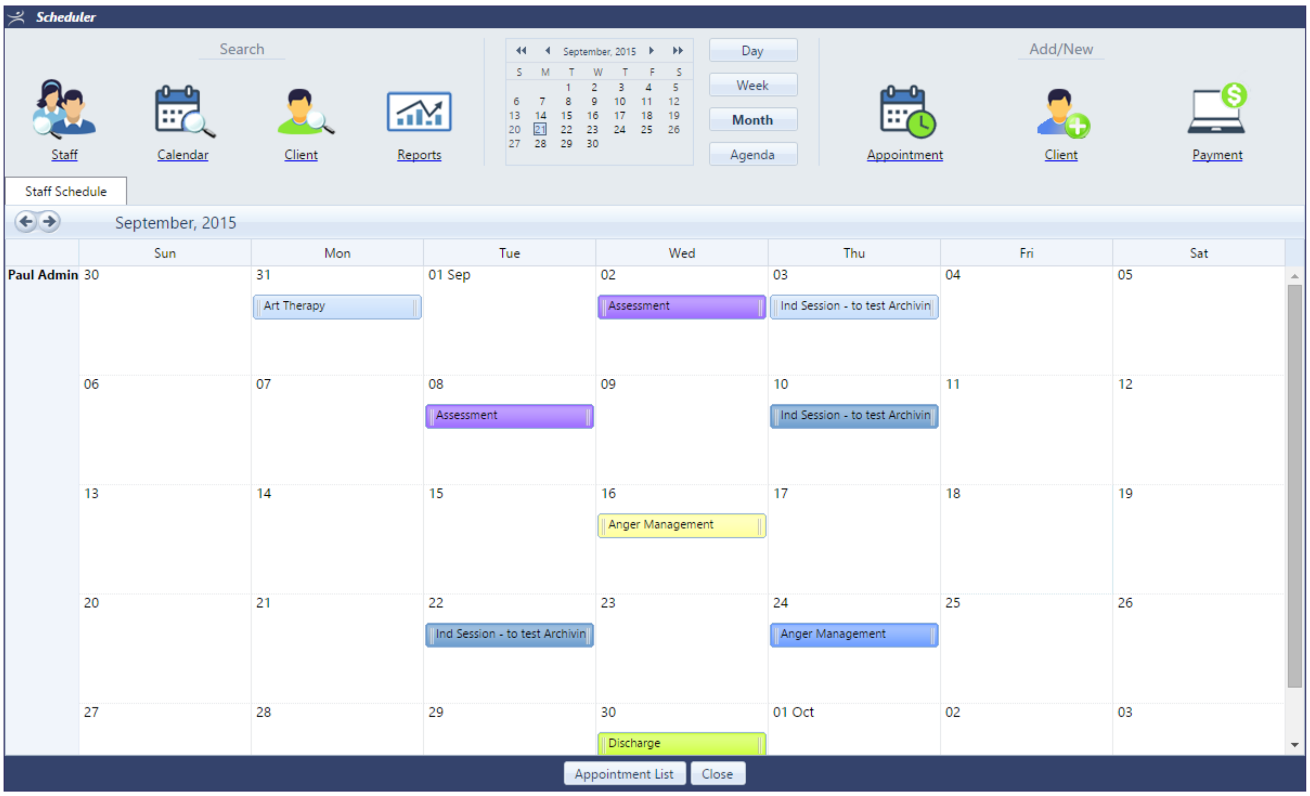
Introduction –

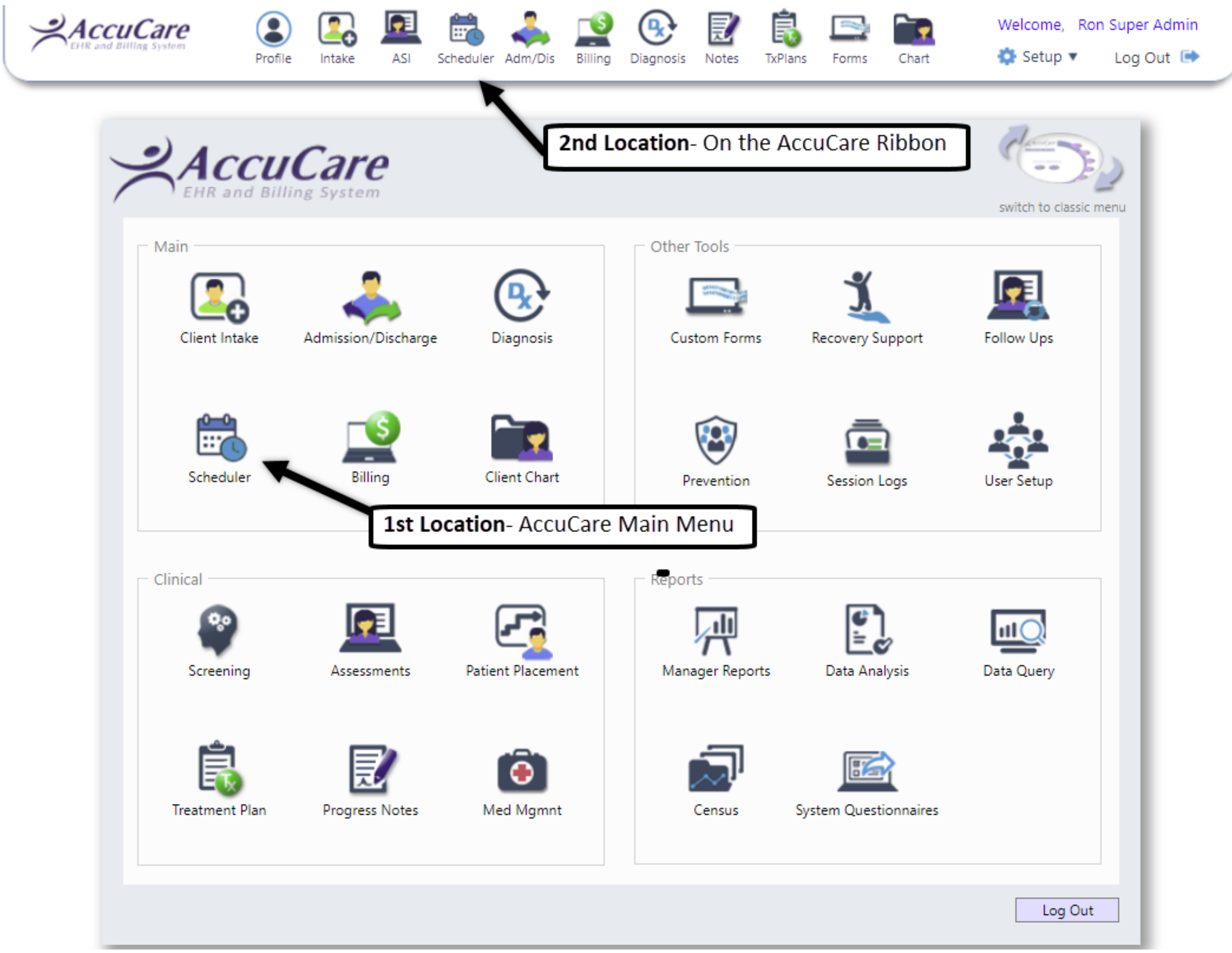
AccuCare now has an updated Scheduler with new features to help streamline the process for agencies that wish to integrate their staff appointments with their clinical and billing workflow. Common features are built into this new version of Scheduler, with additional features such as:

- 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.)

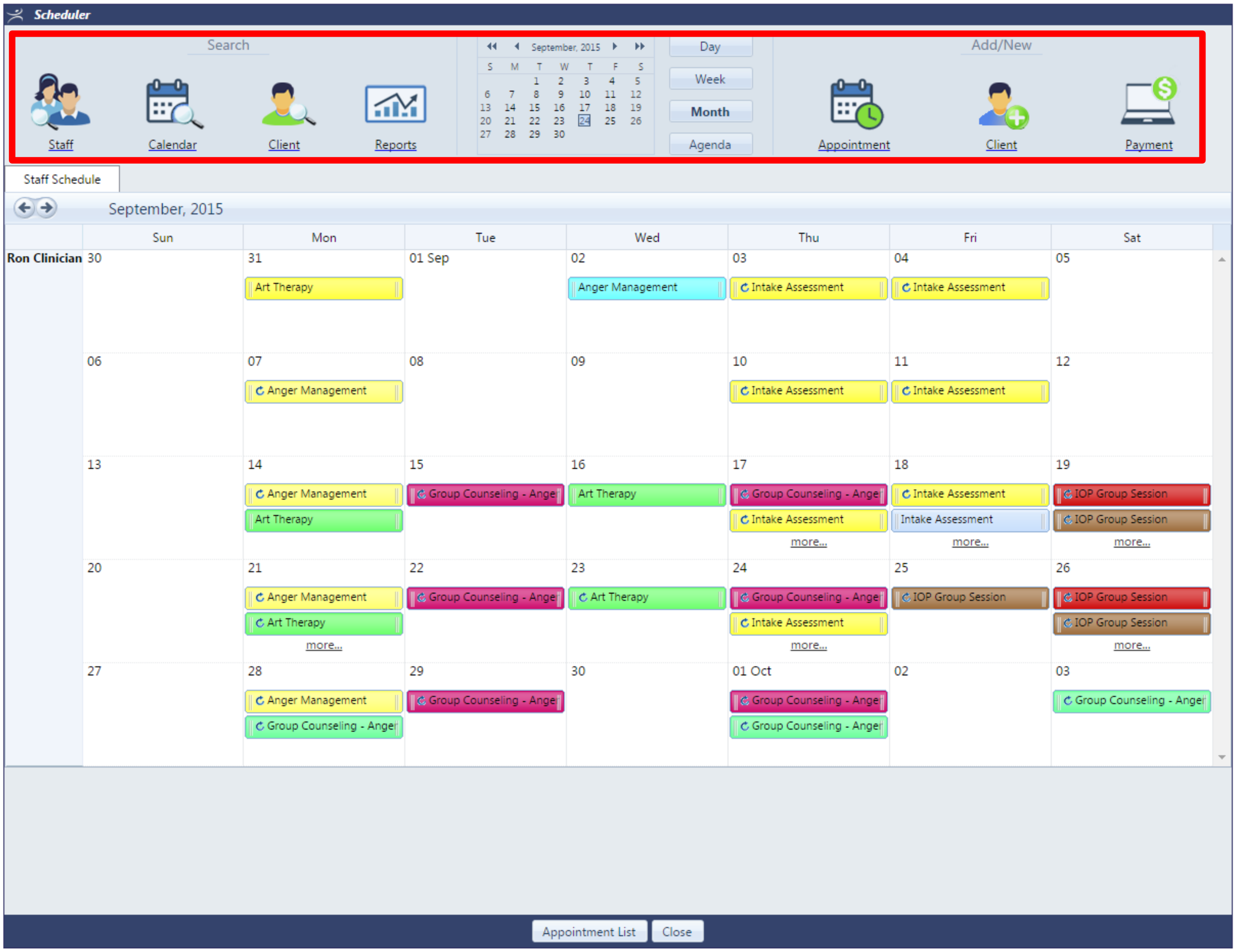


Finding Scheduler in AccuCare

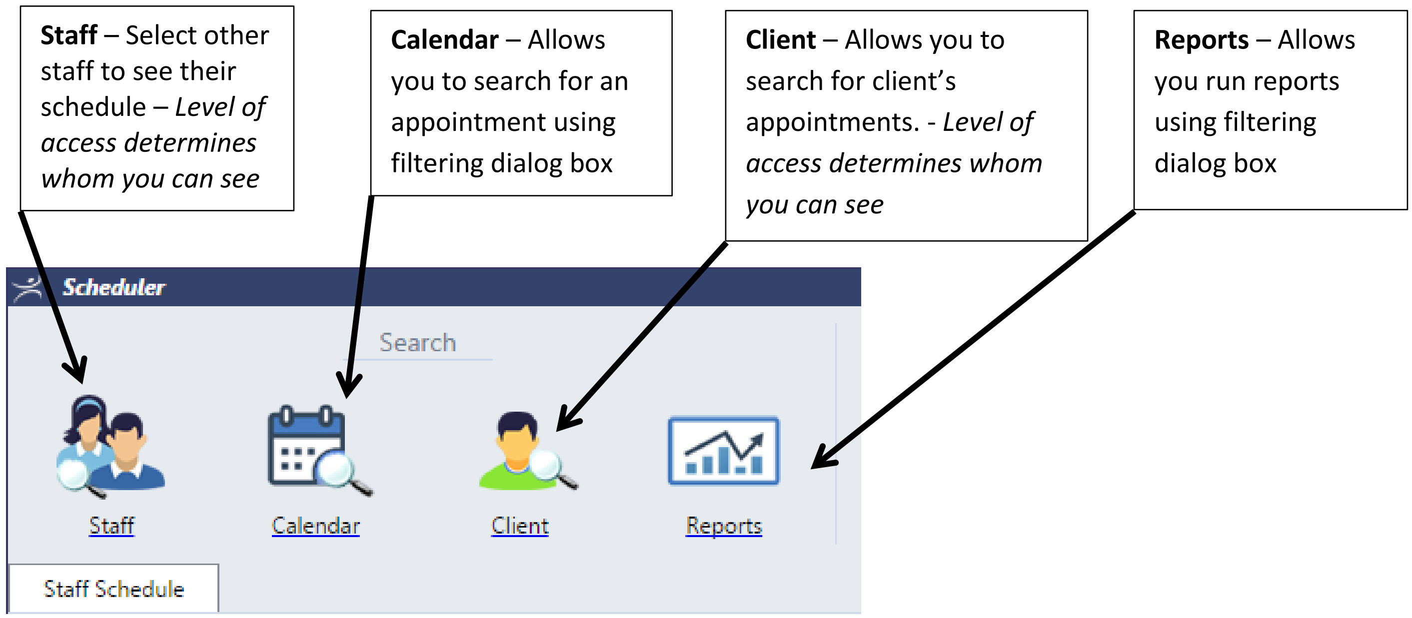
Locations on where to find Scheduler in AccuCare



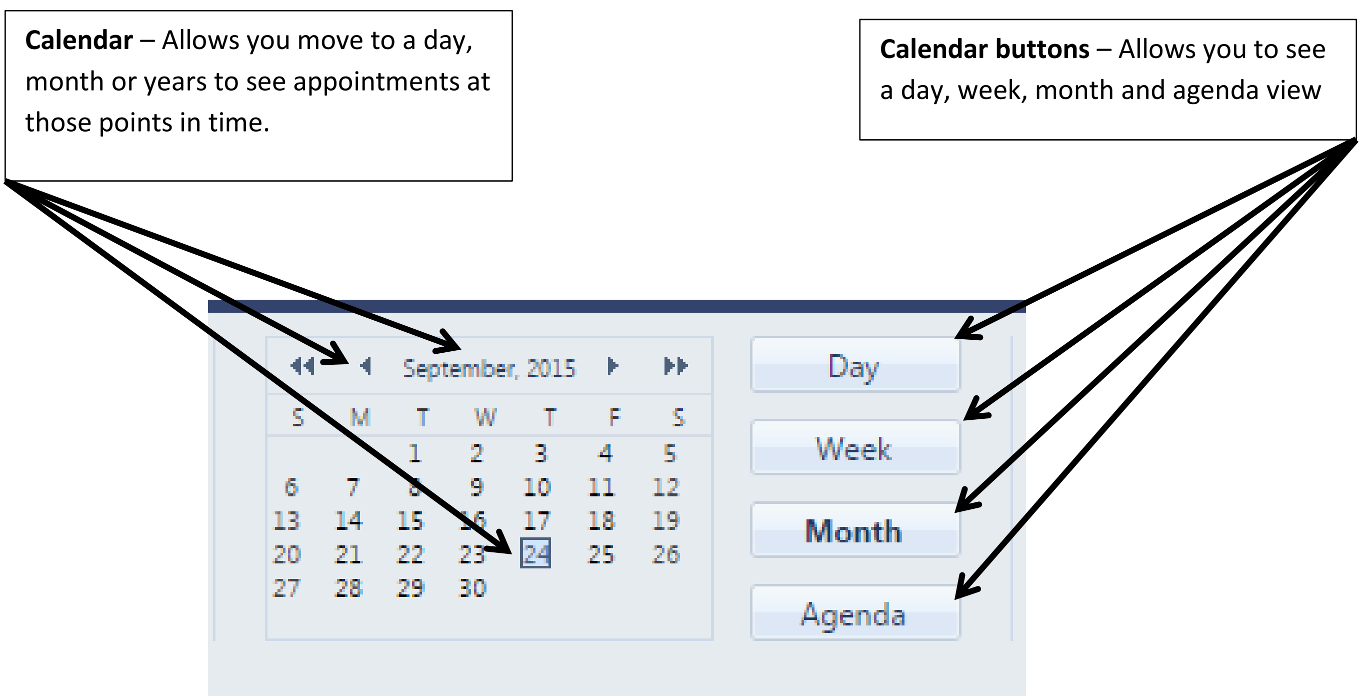
Scheduler Overview Introduction



Schedule - Search Function Overview



Schedule - Calendar Function Overview

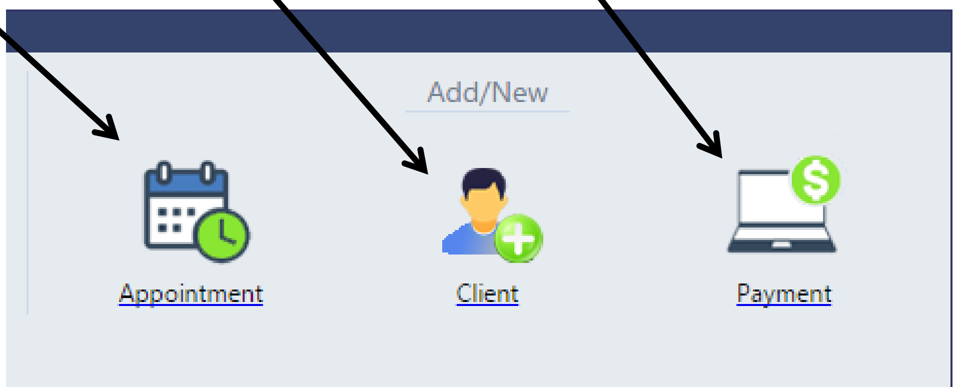


Schedule – Add/New Function Overview

Appointments – Allows you create a new appointment for client or group of clients

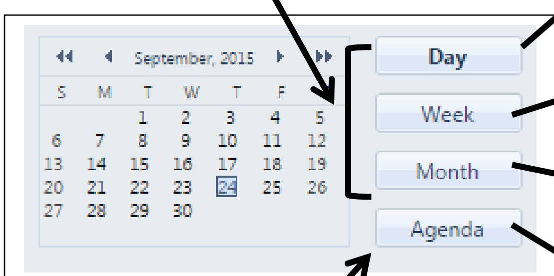
Client – Allows you to either look up existing client or add a new client to Client Intake

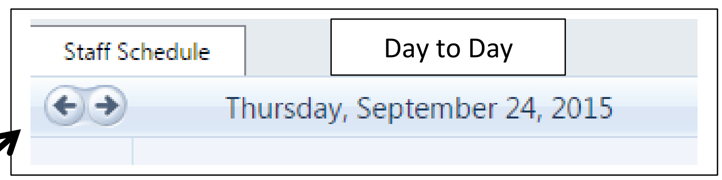
Payment – Allows you enter a client payment and print a receipt – *You have purchased the billing module for this function to work*

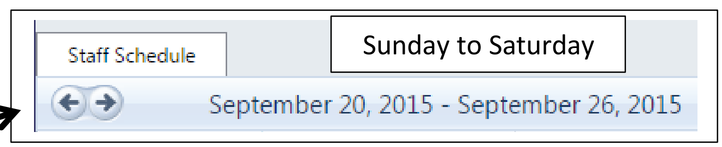


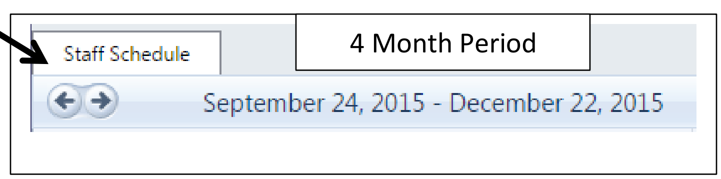
Calendar Navigation arrows

After picking a calendar button use the navigation arrow to move from one [**Day**], one [**Week**] or [**Month**] at a time



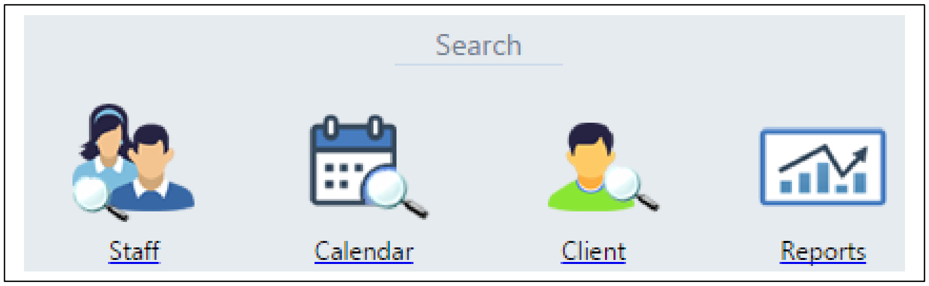






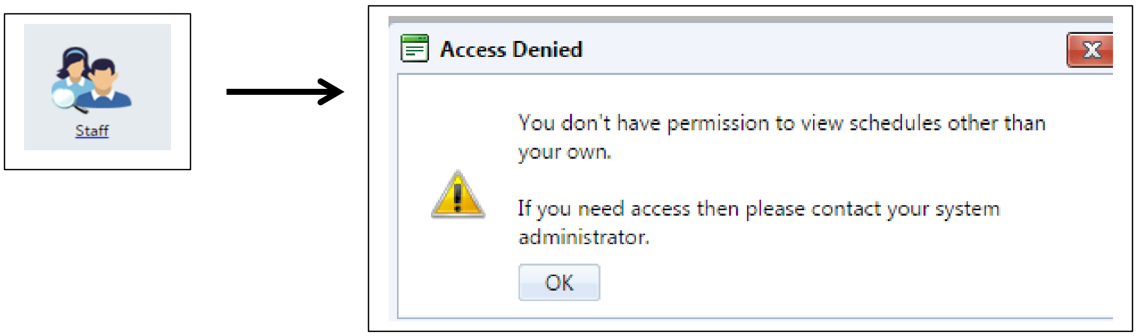
The [**Agenda**] button will show you a list of dates with times and appointment information covering a 4 month period.

Search Functions in Detail View



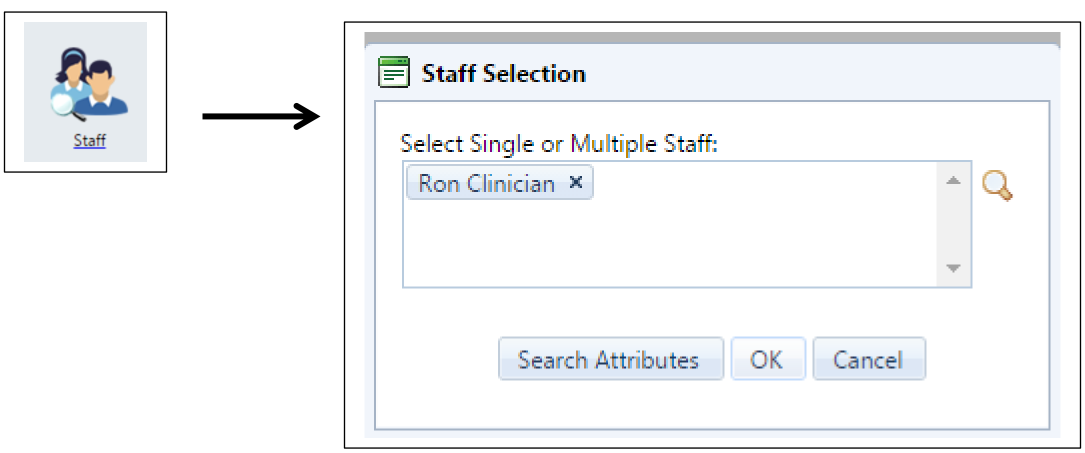
Search – Staff (View Own Schedule Only Access)

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

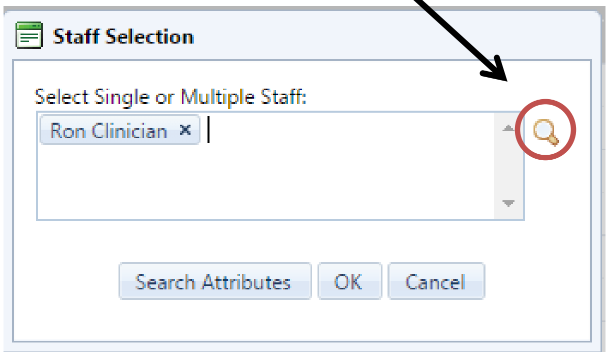


Search – Staff (View All User's Schedule Access)

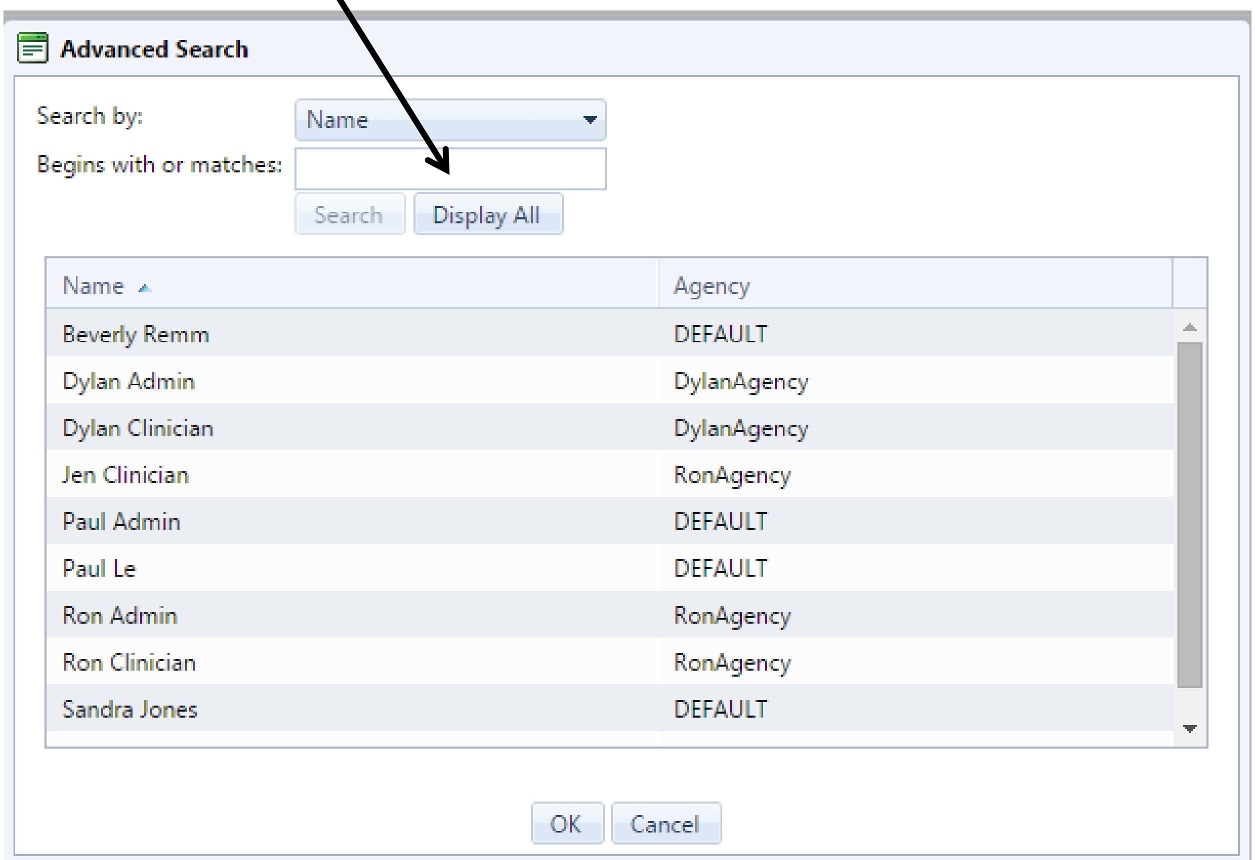
If you have been given access to view all user's schedule then you would be presented this this dialog box. This dialog box would give you the ability to view other clinician's schedule



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

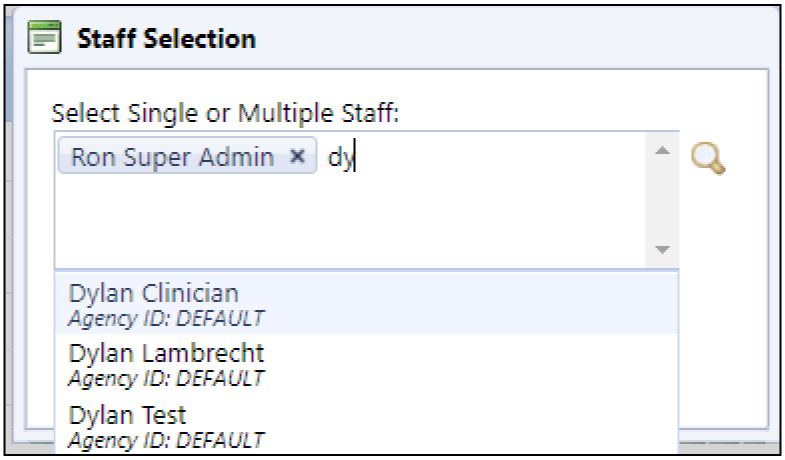


By click on the [**Display All**], you would be given a list of clinician in the database or you could use the search button to look up specific clinician.

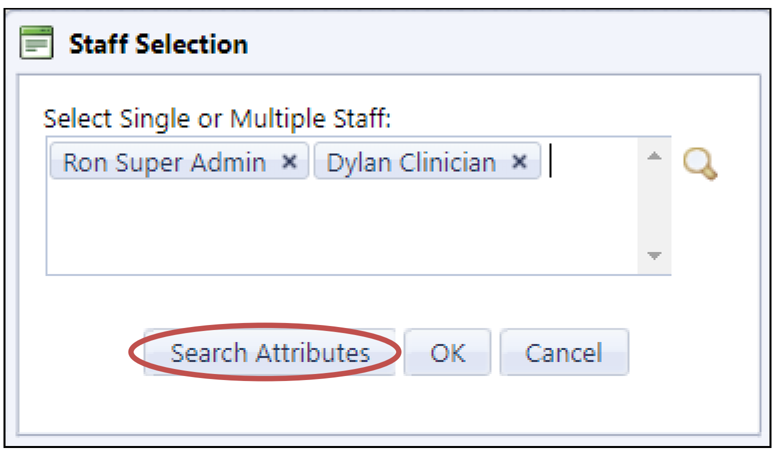


A faster way to search with this dialog box would be start typing the ***first 2 letters of first name*** of clinician. This would give a quick list of anyone who met these criteria.

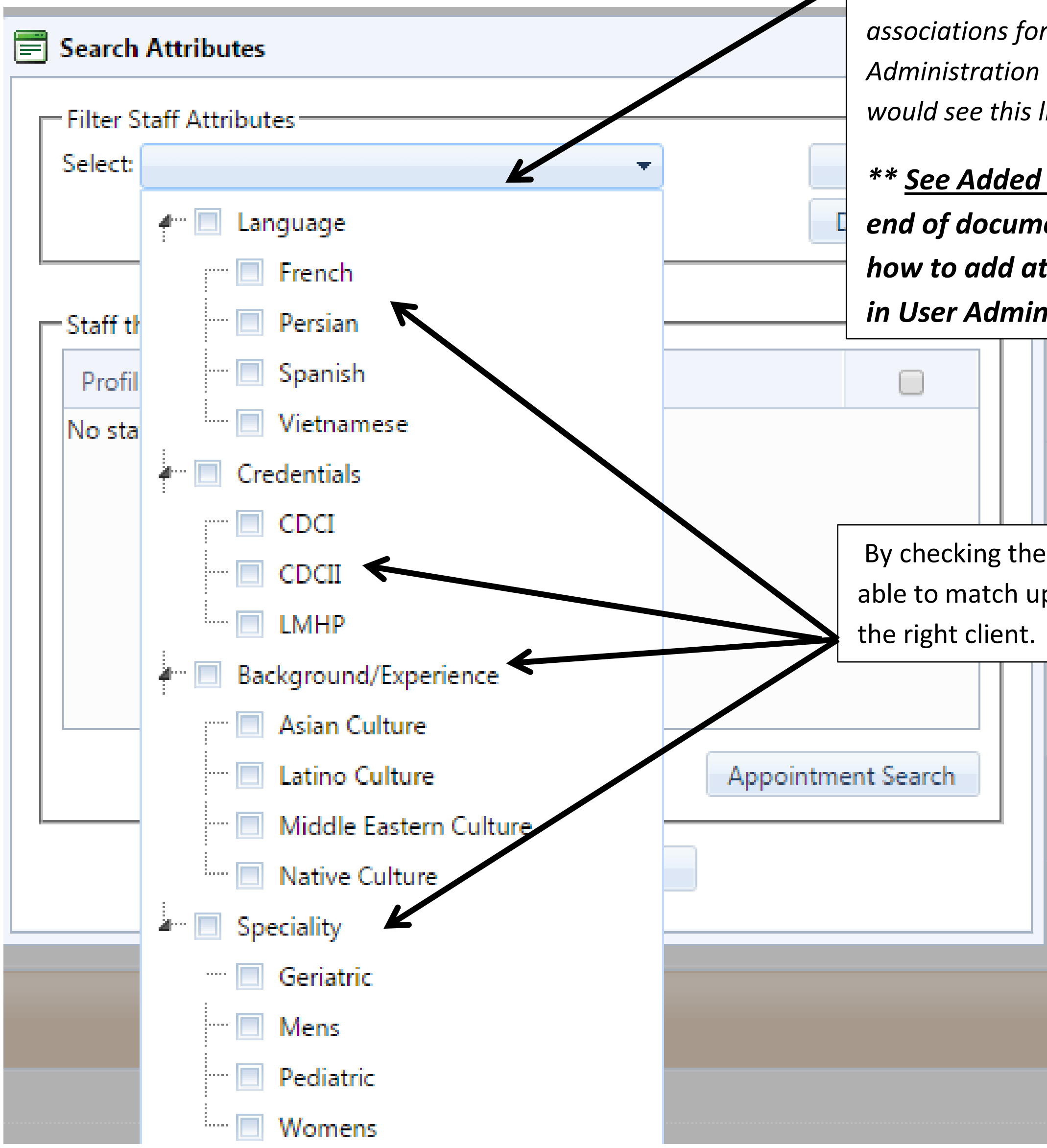
Example



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.*

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

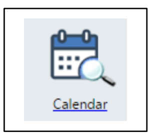
By checking the attributes, you are able to match up the right clinician to the right client.

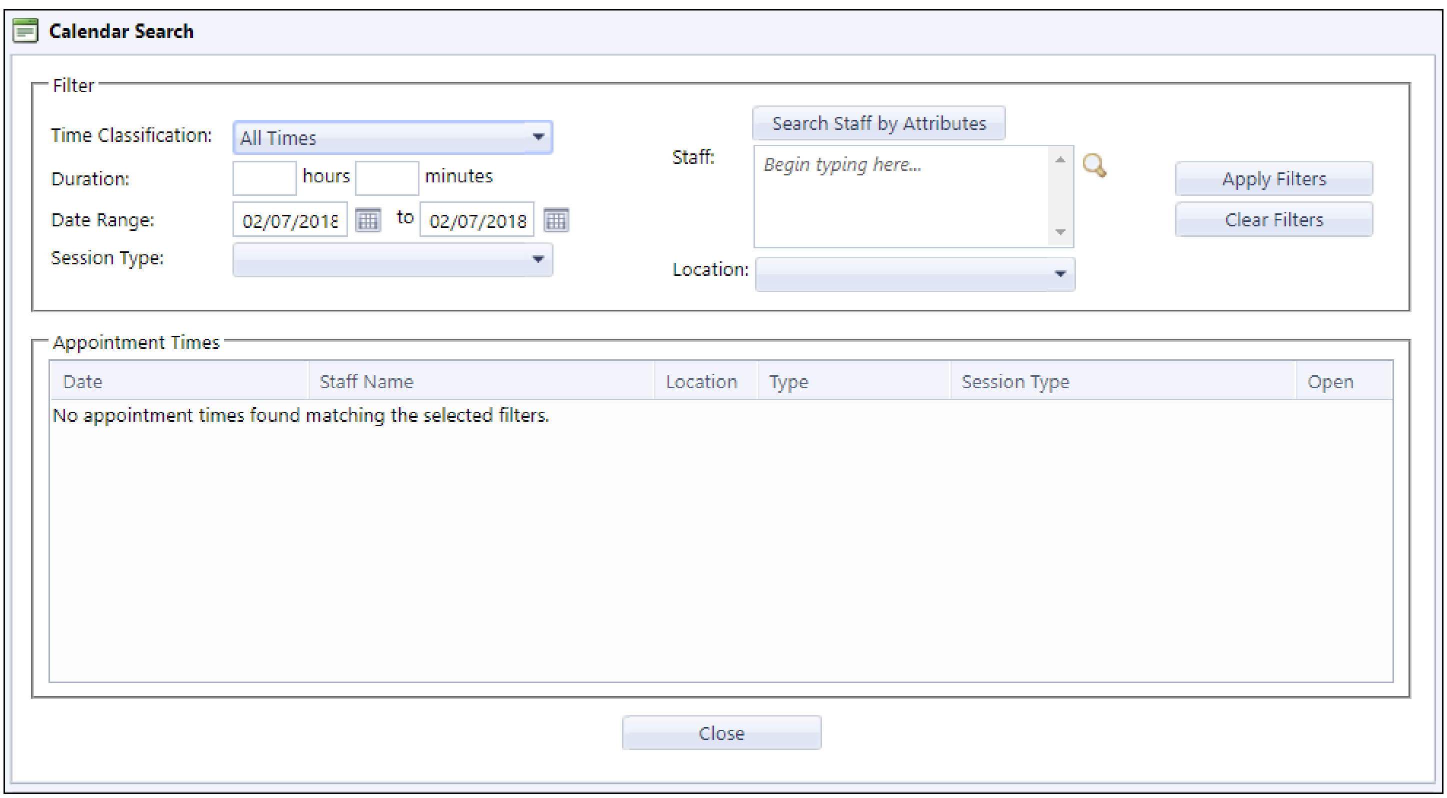
Search - Calendar

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.

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

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





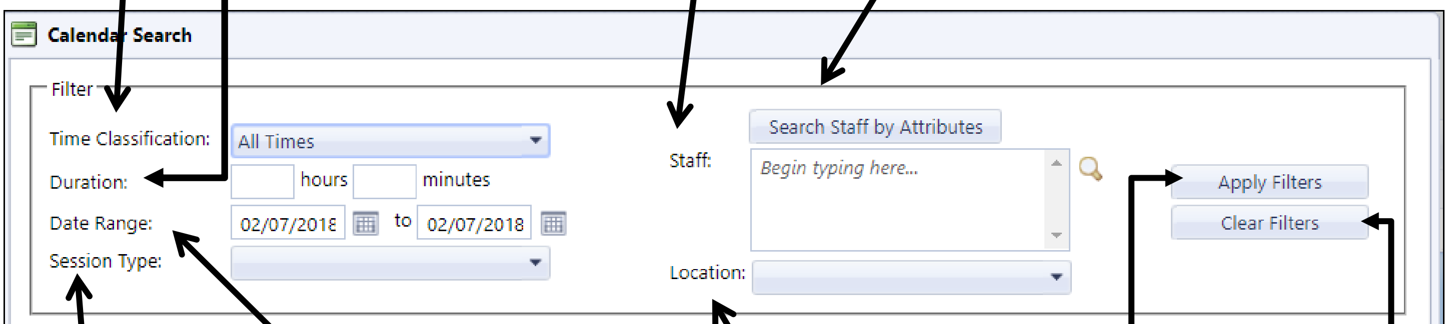
Calendar Filter Options

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.



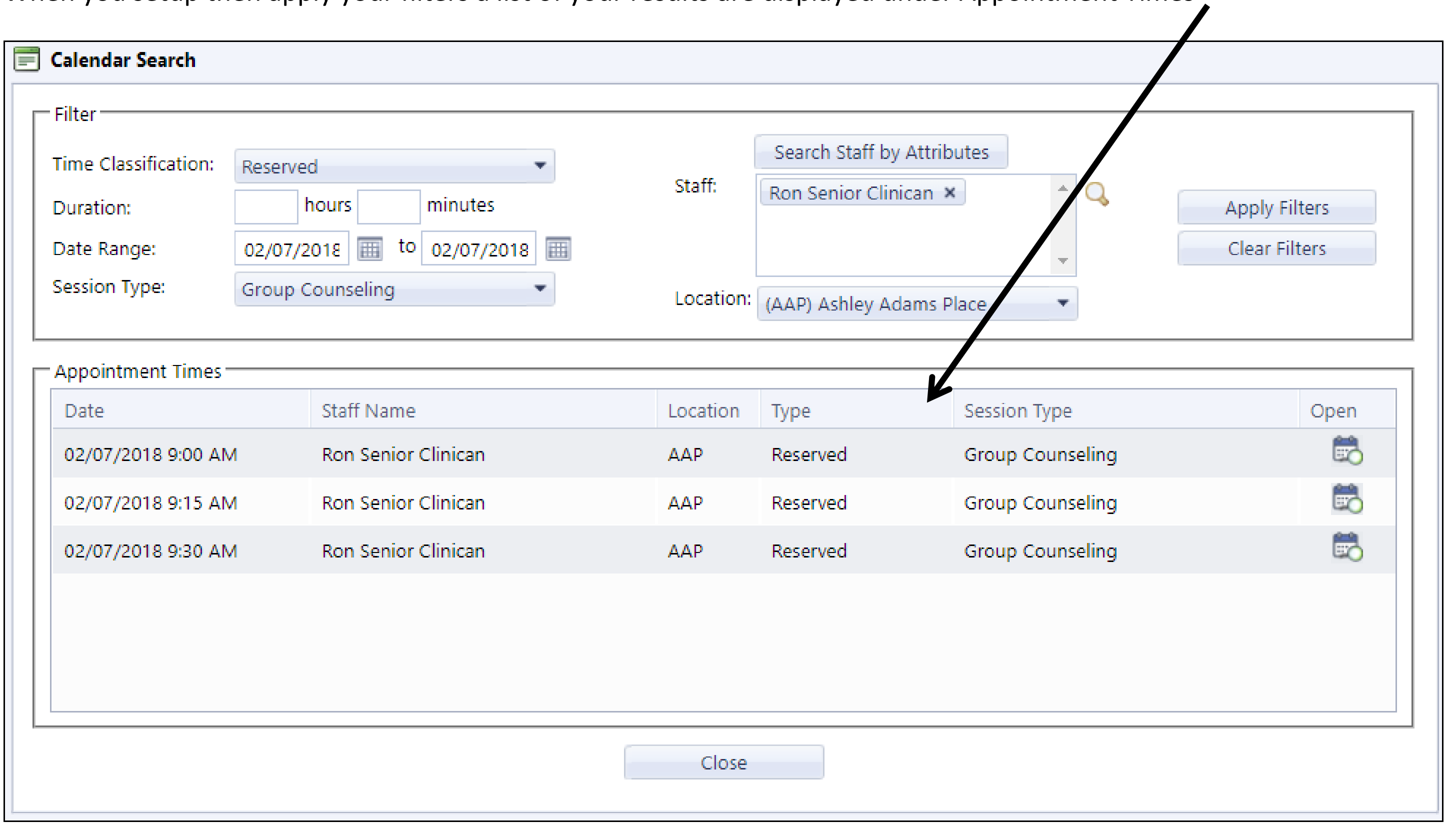
Session Types: You can also filter on session types to narrow you results.

[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.

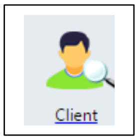
Location: If you have setup your location of services you will be able to use this search to narrow down the location.

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

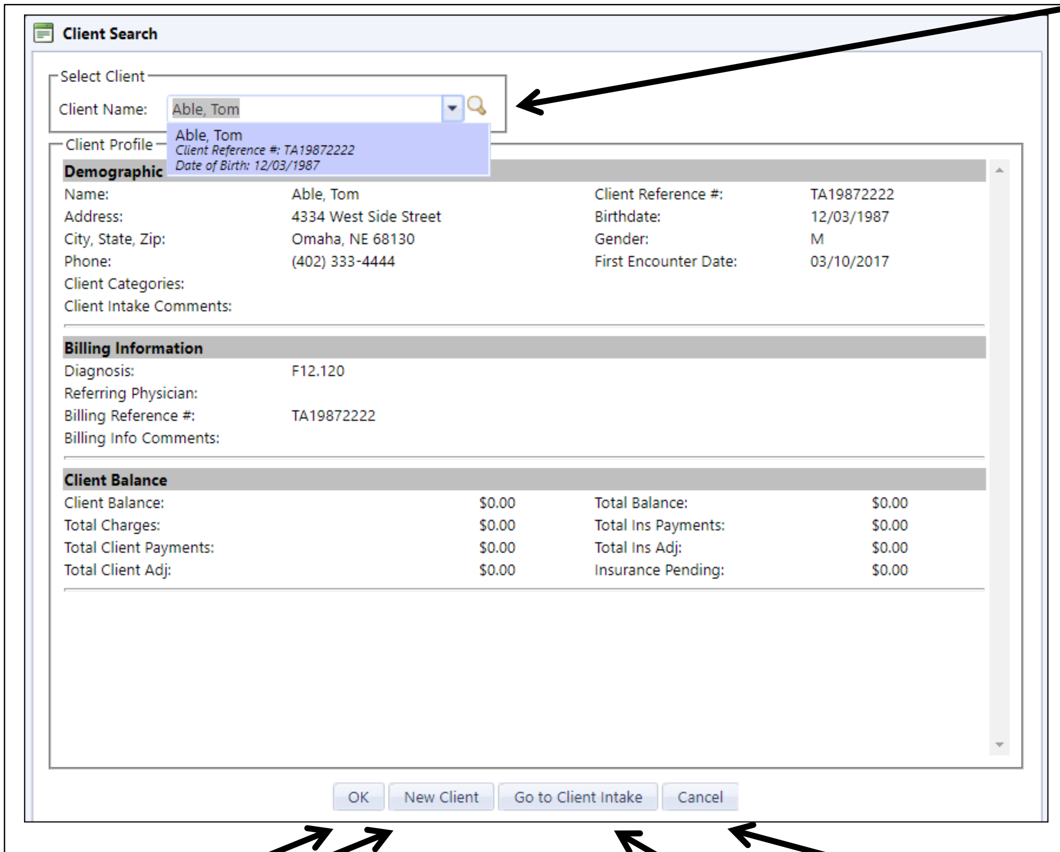


Search – Client

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



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

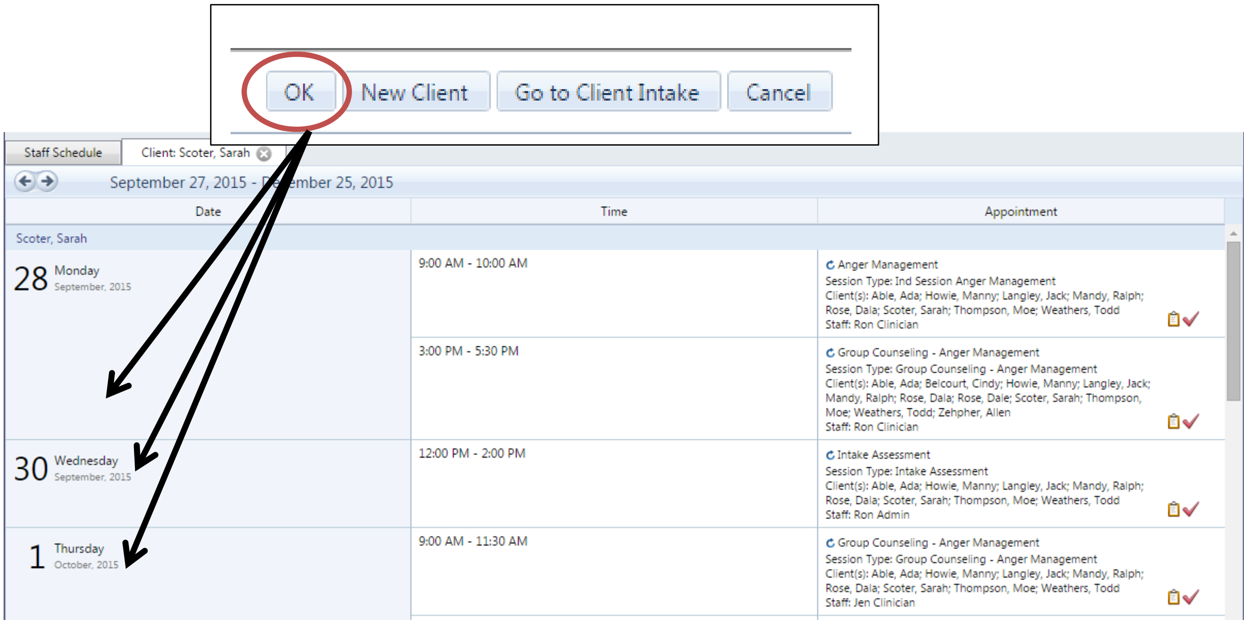
[**New Client**] button opens the Quick Add Client dialog box to search for existing clients or add a new client (see next page for more information)

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

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

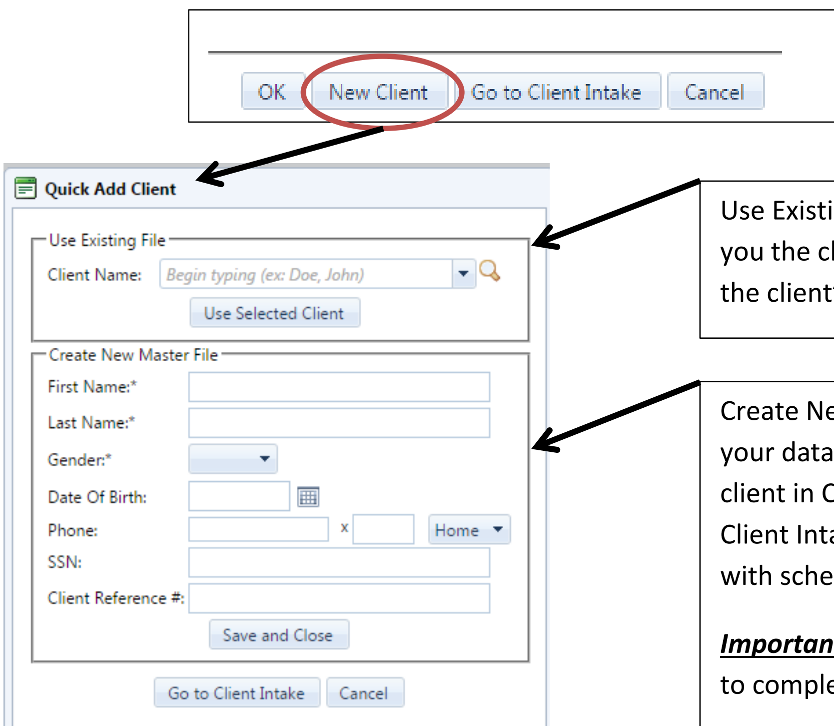
Client Search – [OK] Button

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



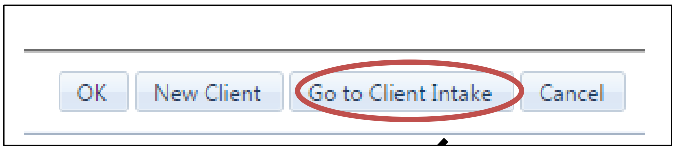
Use Existing File – This upper portion also will give you the chance to select an existing client to open the client's agenda. (See screen shot above)

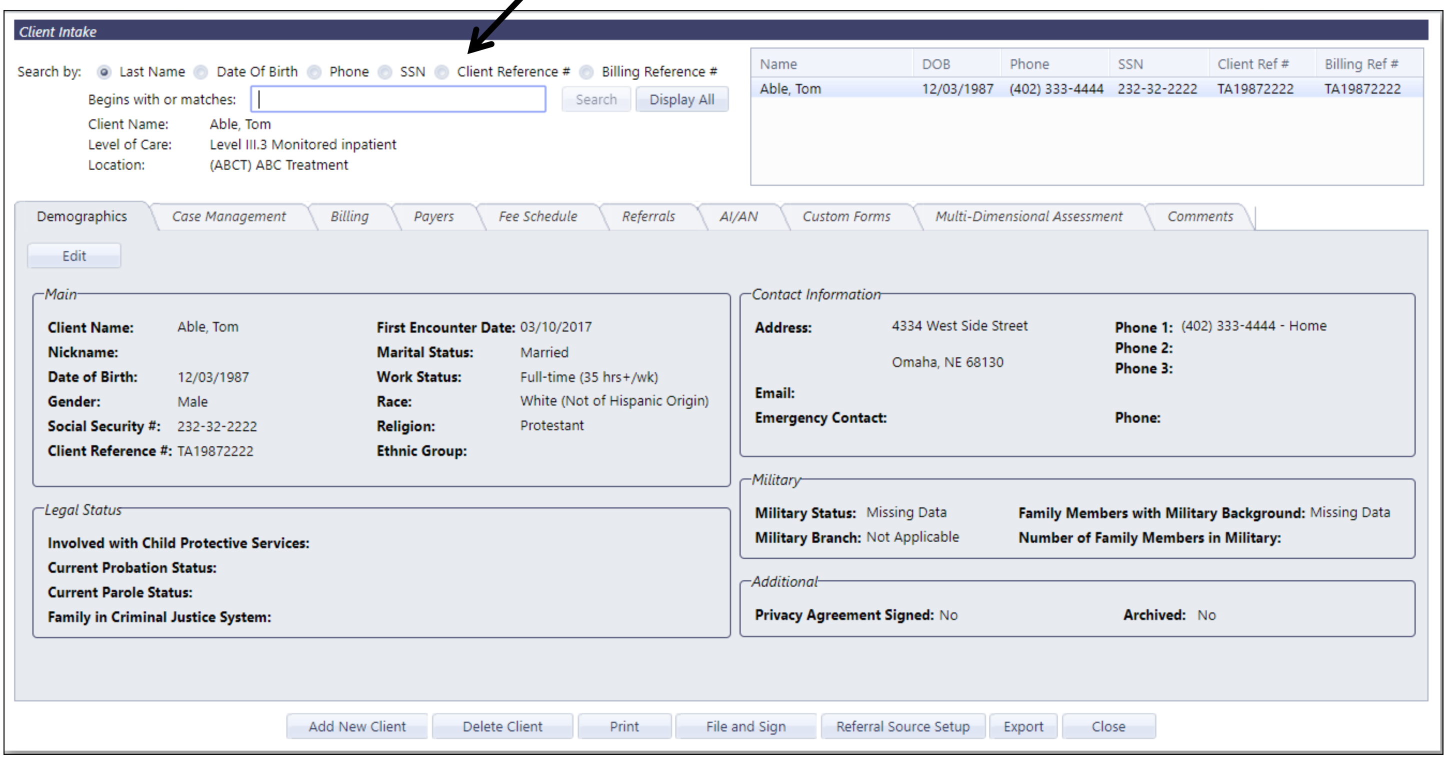
Create New Master File – If this client is new to your database, you can add them quickly to list of client in Client Intake without having to exit to Client Intake. This action will allow you continue with scheduling appointments.

Important Note: Insure to go back to Client Intake to complete the demographics

Client Search – [Go to Client intake] Button

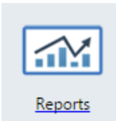
This exits the Scheduler and opens the Client Intake Administration dialog box. You can add either a new client or lookup an existing client.



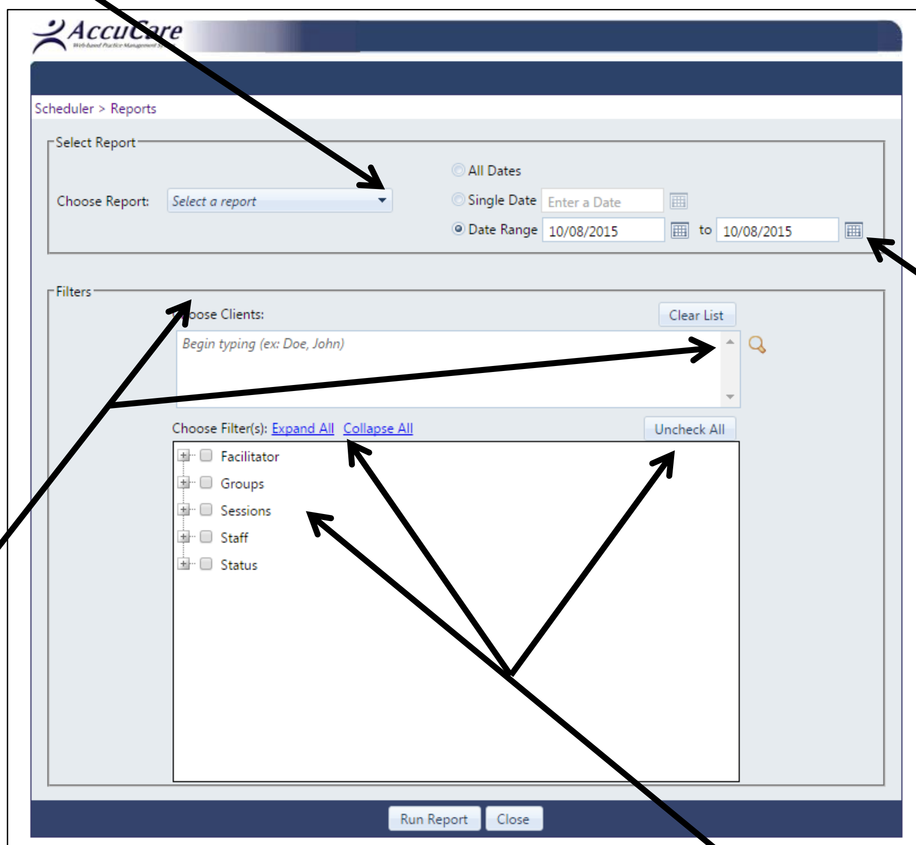


Search – Reports

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. ***<u>See next page for list of reports.</u>***



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

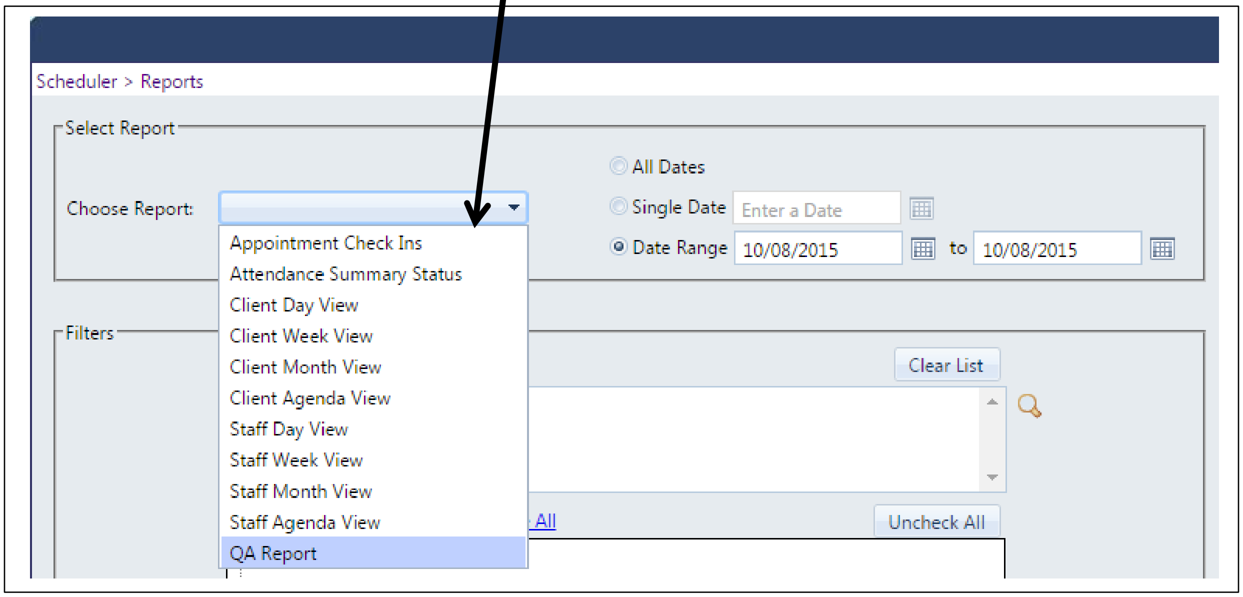
<u>Note: The default date is set for today date</u>

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

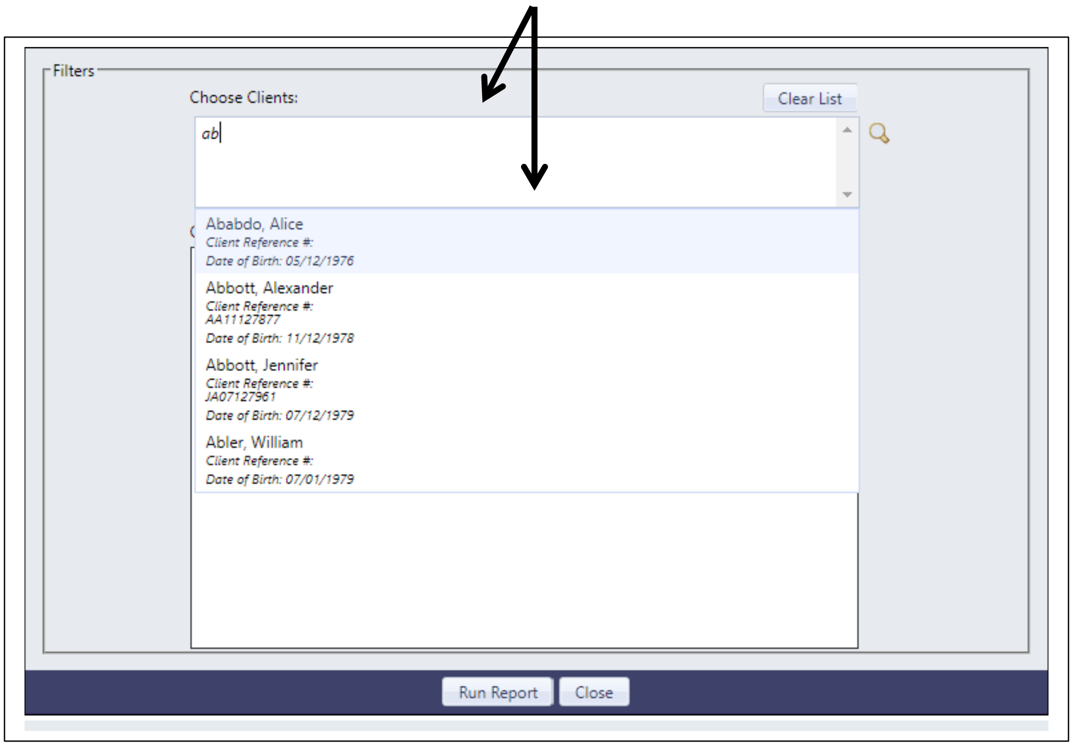
Select Report

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



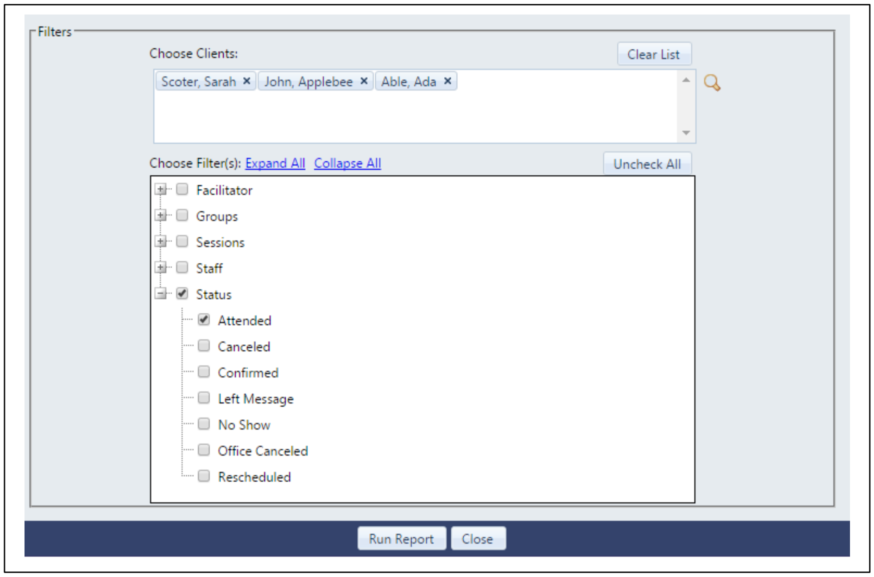
Filters – Choose Clients

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 you output by Facilitator, Group, Sessions, Staff and Status. In this example, I choose Status →Attended

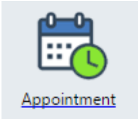


Here is sample of the report create from selections.

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)	

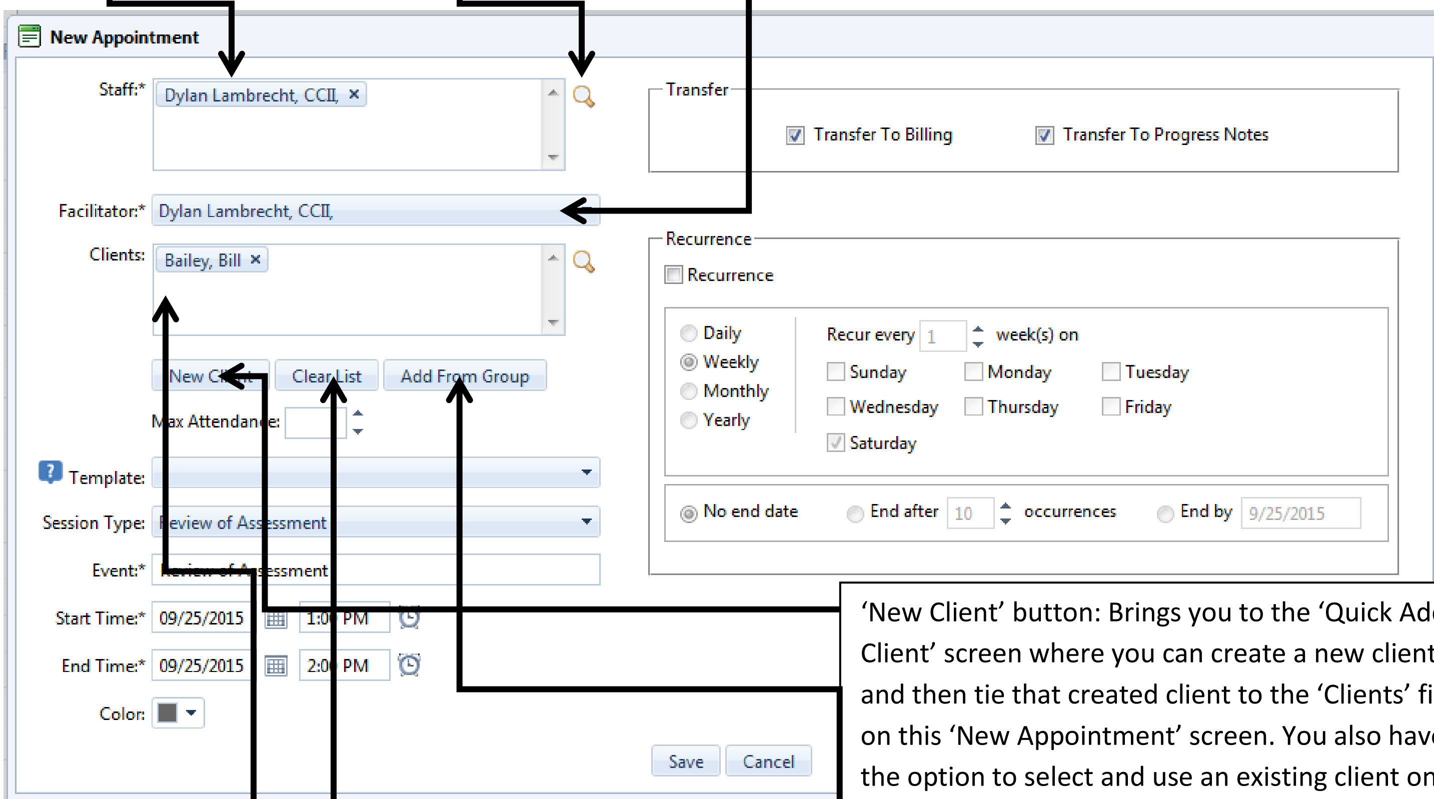
Add/New - Appointments



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.



'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.

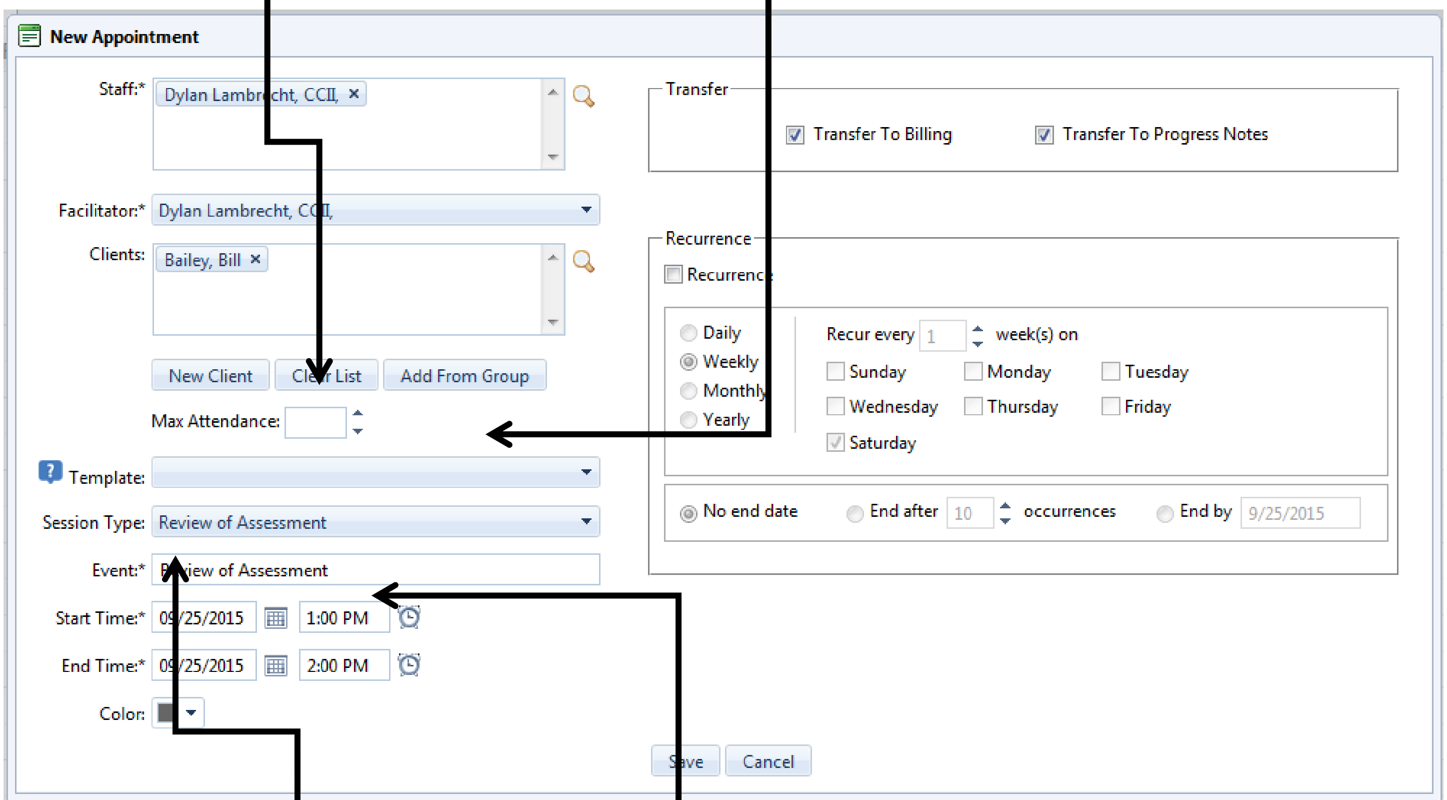
'Clear List' button: Clears all clients from the 'Clients' field directly above this button.

'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 '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.

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.

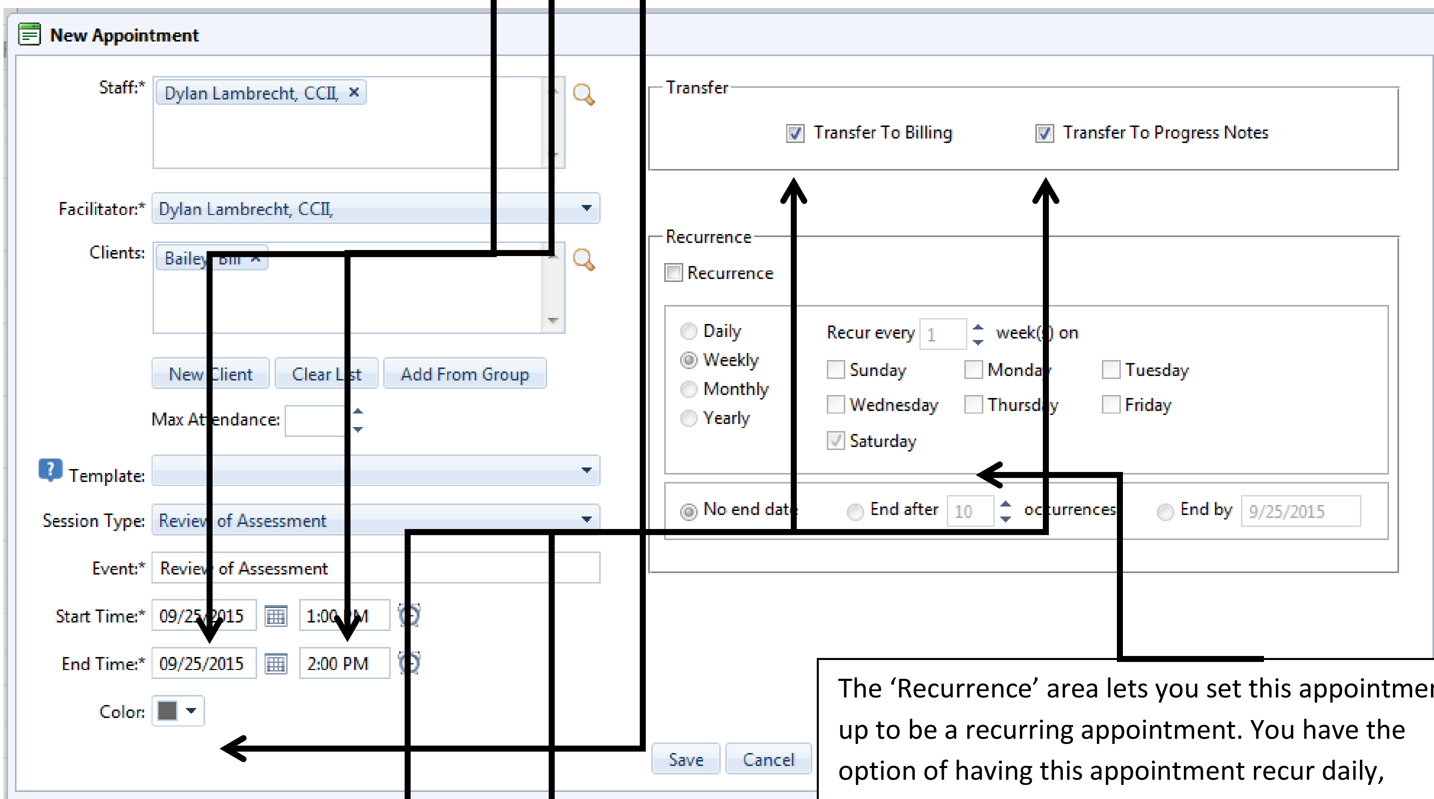


The 'Session Type' dropdown is where you would select the session type that is used when you transfer client check-ins from this appointment to progress notes. Session Types are used when creating progress notes and creating new scheduler appointments.

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.



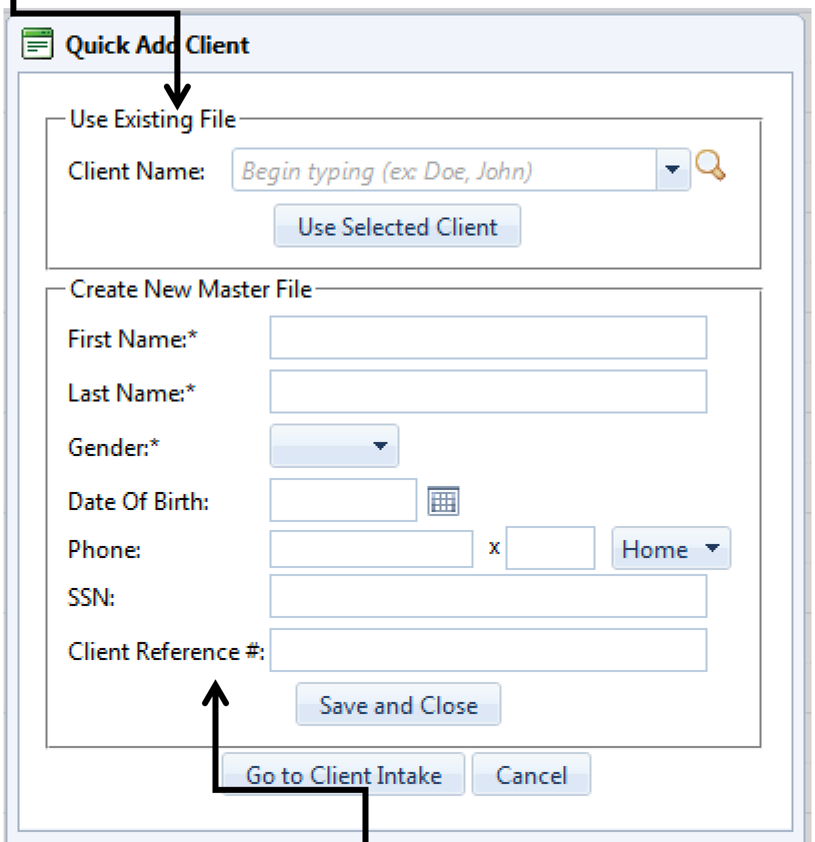
The ‘Recurrence’ area lets you set this appointment up to be a recurring appointment. You have the option of having this appointment recur daily, weekly, monthly, or yearly. To begin, you would select the ‘Recurrence’ checkbox and then select how you would like this appointment to recur. At the bottom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

The ‘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 ‘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.

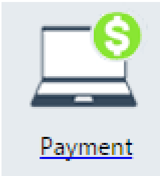
Add/New - Client

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'.

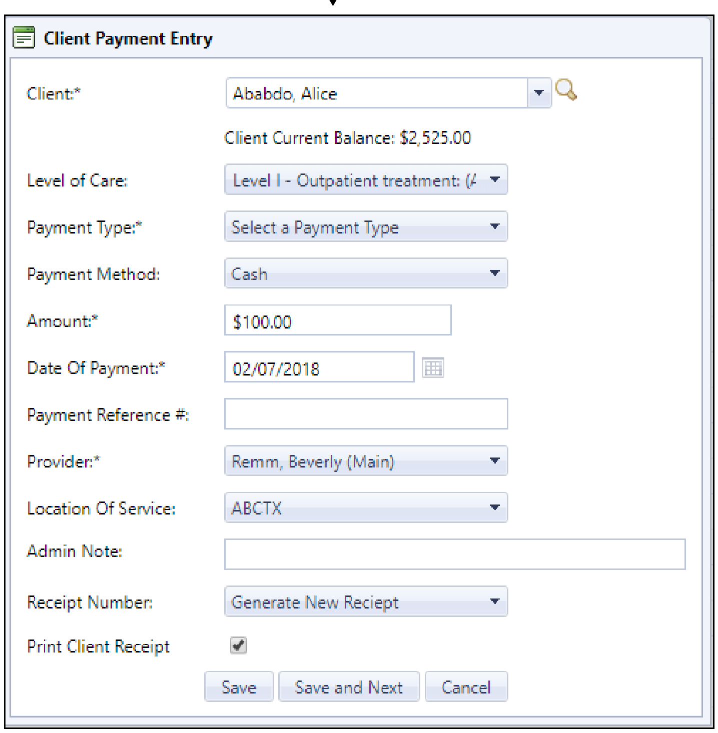


The 'Create New Master File' area allows you to quickly create a new client to be added to the 'Client Intake' area of AccuCare. You would enter the client details and then select the 'Save and Close' button. Prior to creating the client it is best practice to first select the 'Go to Client Intake' button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

Add/New - Payments

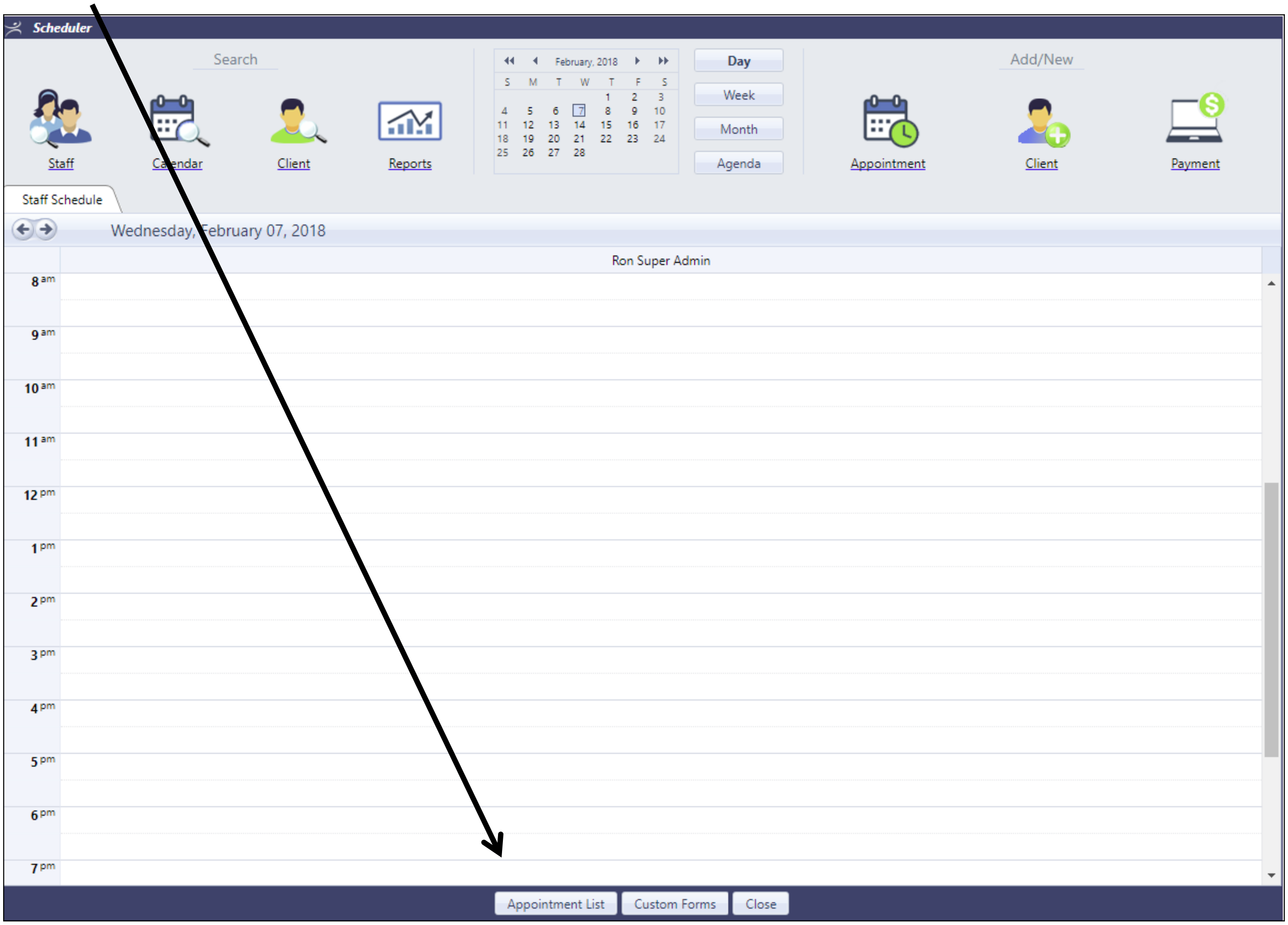


The 'Client Payment Entry' screen is opened by selecting the 'Payment' link under the 'Add/New' area. This screen is an easy way to take a customer payment and have those payment details recorded within the 'Billing Transfer' module. From this screen, you also have the option of printing a client receipt 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.

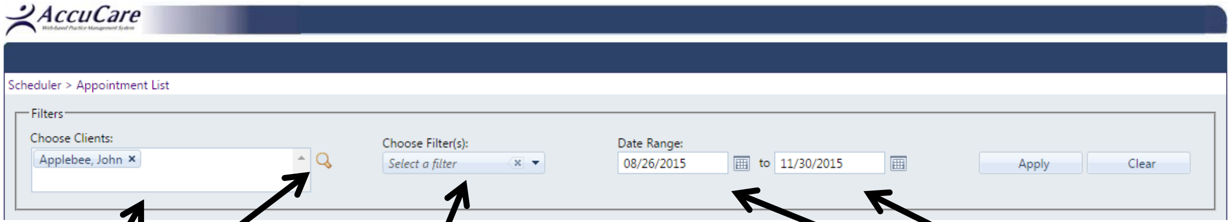


Appointment List Button

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



Appointment Filters – overview

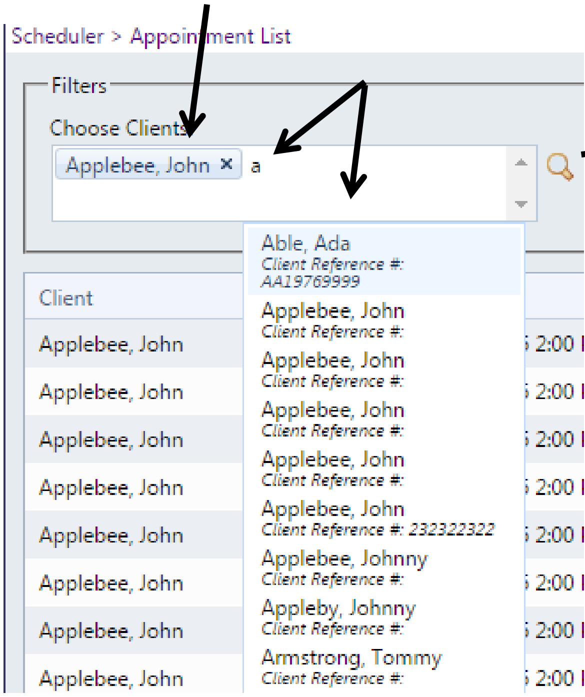


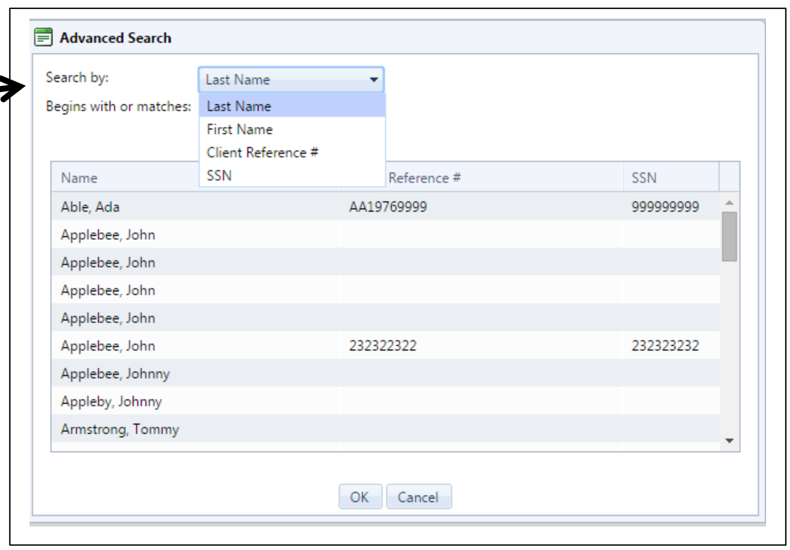
Choose Filters will further sort your search to look for specific conditions

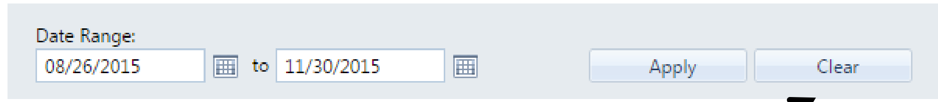
Choose you client or clients using this part of the filter. You can type in the name of client or use the spyglass to search by last name, first name, Client Ref# or SSN.

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

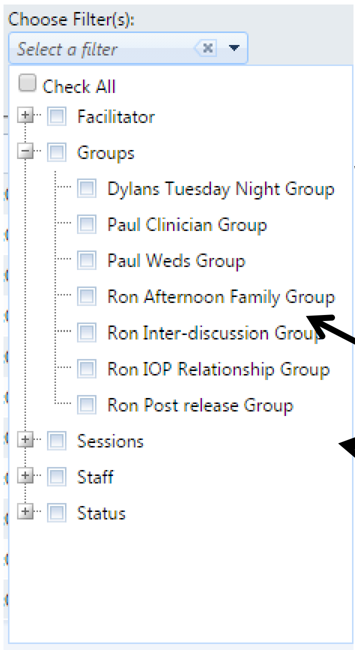






Put in you date range then click the [Apply] button

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!