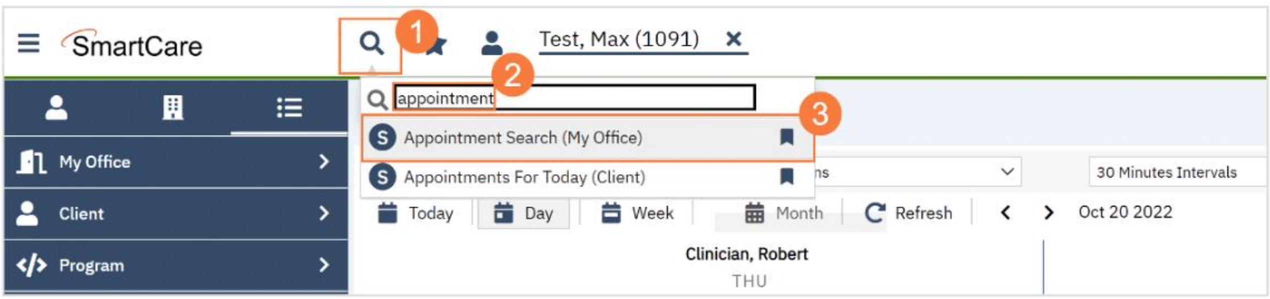
SmartCare search words are in **bold** throughout guide.

How to Use the Appointment Search Screen

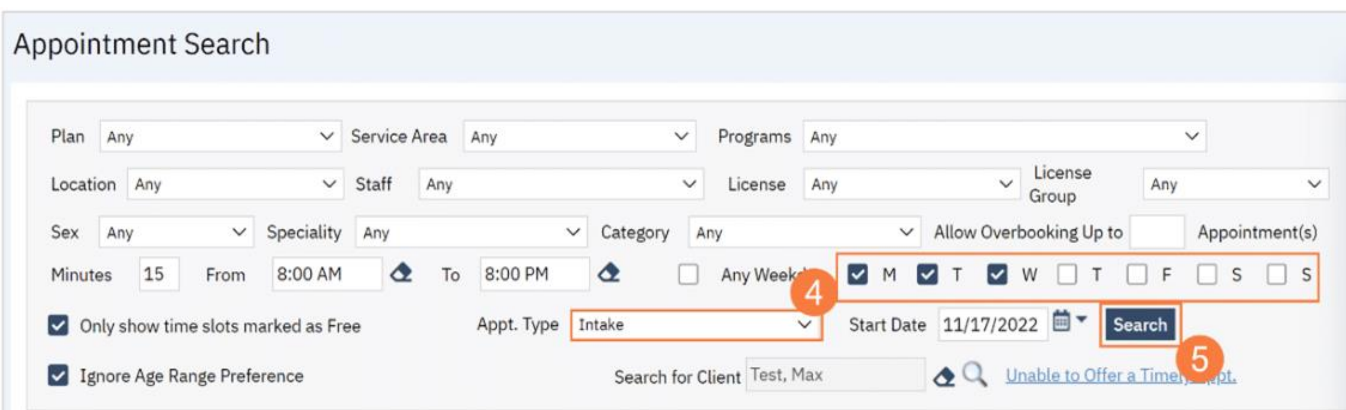
Note: This feature only works AFTER reoccurring events have been added to Staff Calendar (How-to discussed later in this guide. Also, although the client doesn't have to be Enrolled in a program, they do need to have a program assigned to them in the Requested status, to be able to schedule the appointment.)

1. With the client open, click the Search icon.
2. Type **Appointment** in the search bar.
3. Click to select **Appointment Search (My Office)**



4. In the Appointment Search screen, select the parameters for your search, such as:

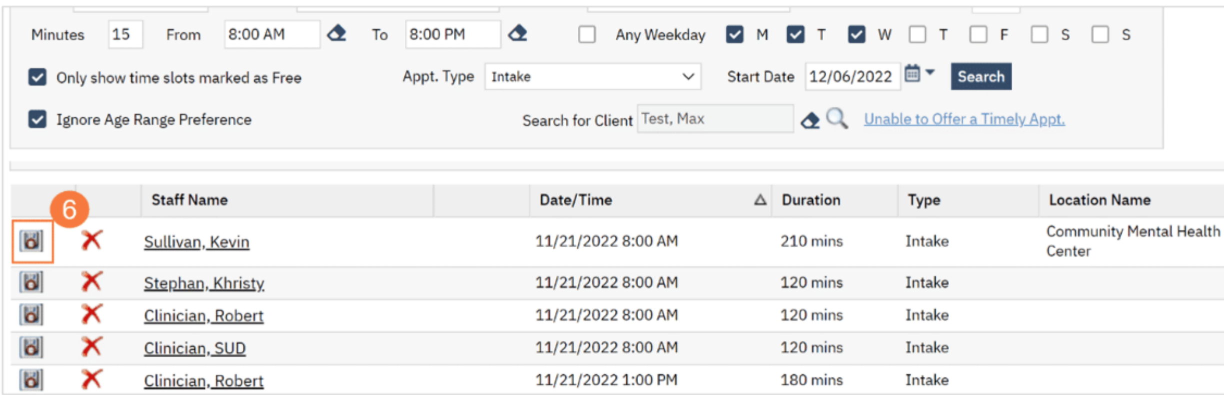
- Appointment type
- Days of the week



- Clinician, etc.

5. Click Search.

6. A list of available appointments will populate below, click the Schedule Appt icon next to the appointment time you want to choose.

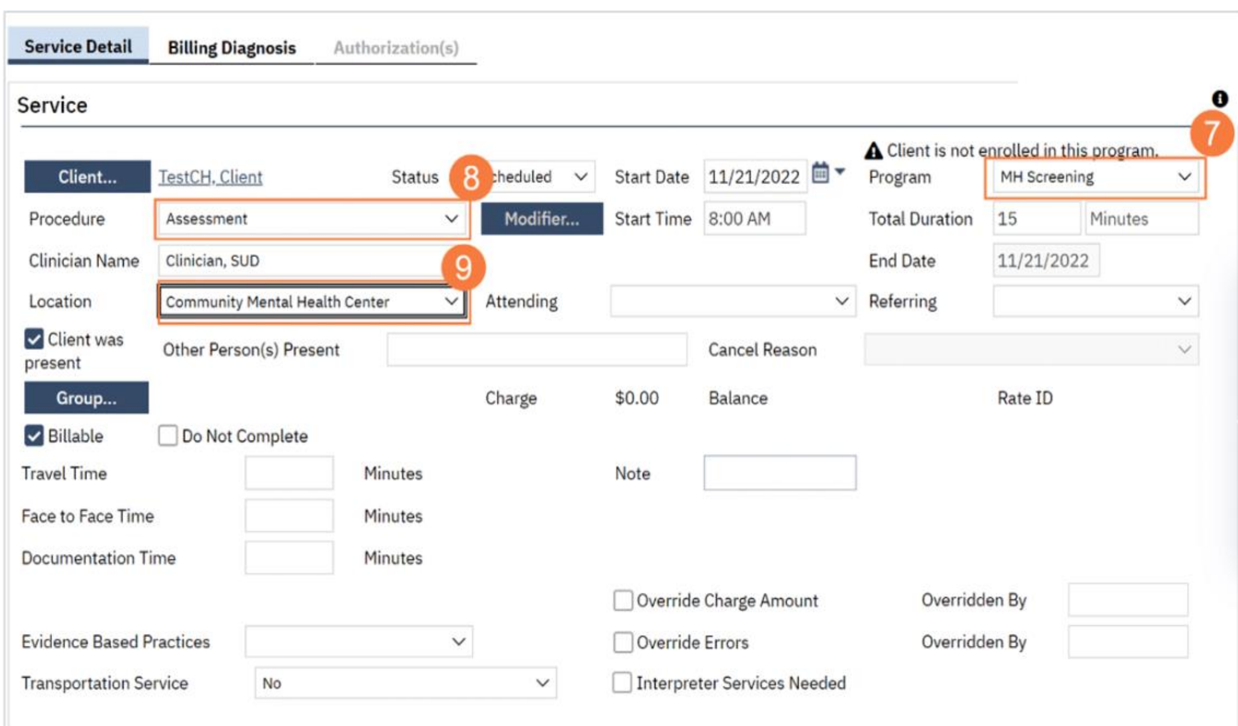


7. The Service Detail window will open, click the drop-down menu in the Program field to select a program.

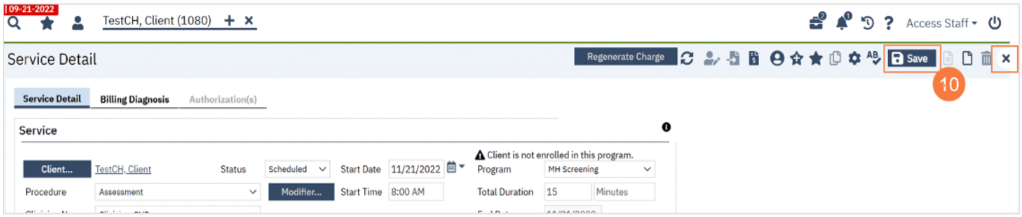
- Note: If a client is not yet enrolled in the program, an alert will pop up. This will not keep you from scheduling this appointment.

8. Click the drop-down menu in the Procedure field and select the appropriate option.

9. Click the drop-down menu in the Location field and select the appropriate location.

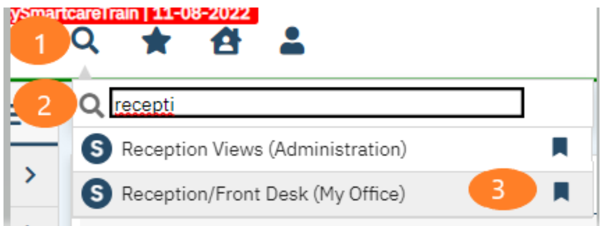


10. Click Save to schedule the appointment. Click the X icon to close this screen.



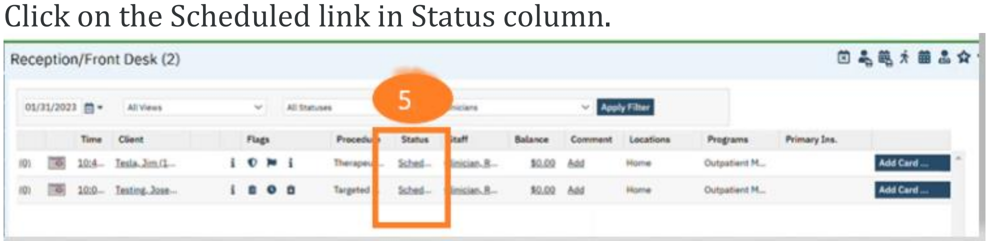
How to Check-in a client.

1. Click the Search icon.
2. Type **Reception** in the search bar.
3. Click to select **Reception-Front Desk (My Office)**

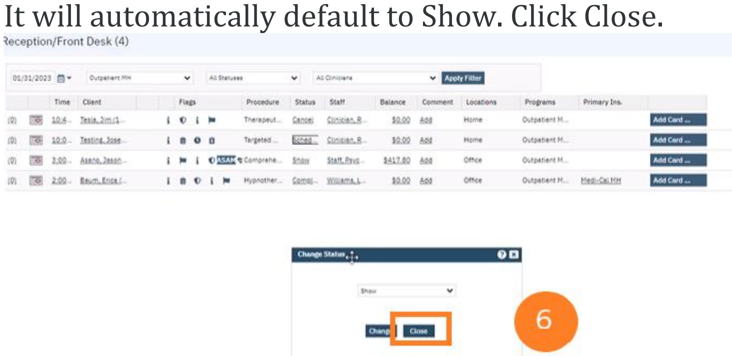


4. In the Reception/Front Desk screen, locate the correct client along with correct staff and appointment time.

5. Click on the Scheduled link in Status column.



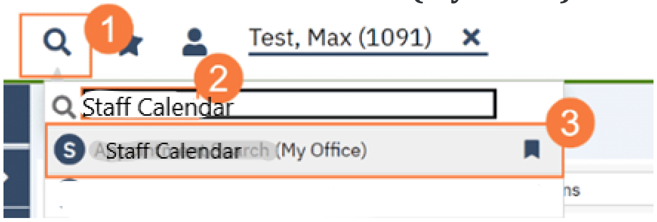
6. It will automatically default to Show. Click Close.



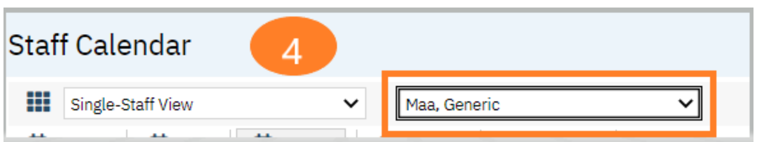
Note: Once the client has been checked-in, it will display as “Show” on the staff’s Appointments for Today widget. Staff should be encouraged to frequently refresh their Appointments for Today widget.

How to Schedule an Appointment

1. Click the Search icon.
2. Type **Staff Calendar** in the search bar.
3. Click to select **Staff Calendar (My Office)**

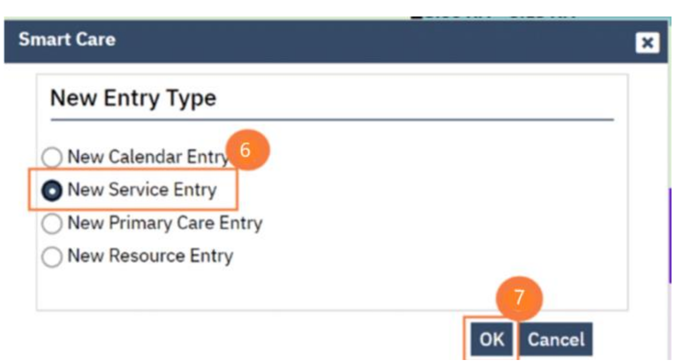


4. Select the staff you want to schedule for.



5. From the Staff Calendar screen, click and drag your mouse on the calendar timeslot you want to book. Note: If you are trying to schedule a time that has an available appointment spot indicated in the staff's calendar, you will need to click and drag your mouse in the white area next to the color block.

6. In the New Entry Type pop-up, select the New Service Entry radio button.



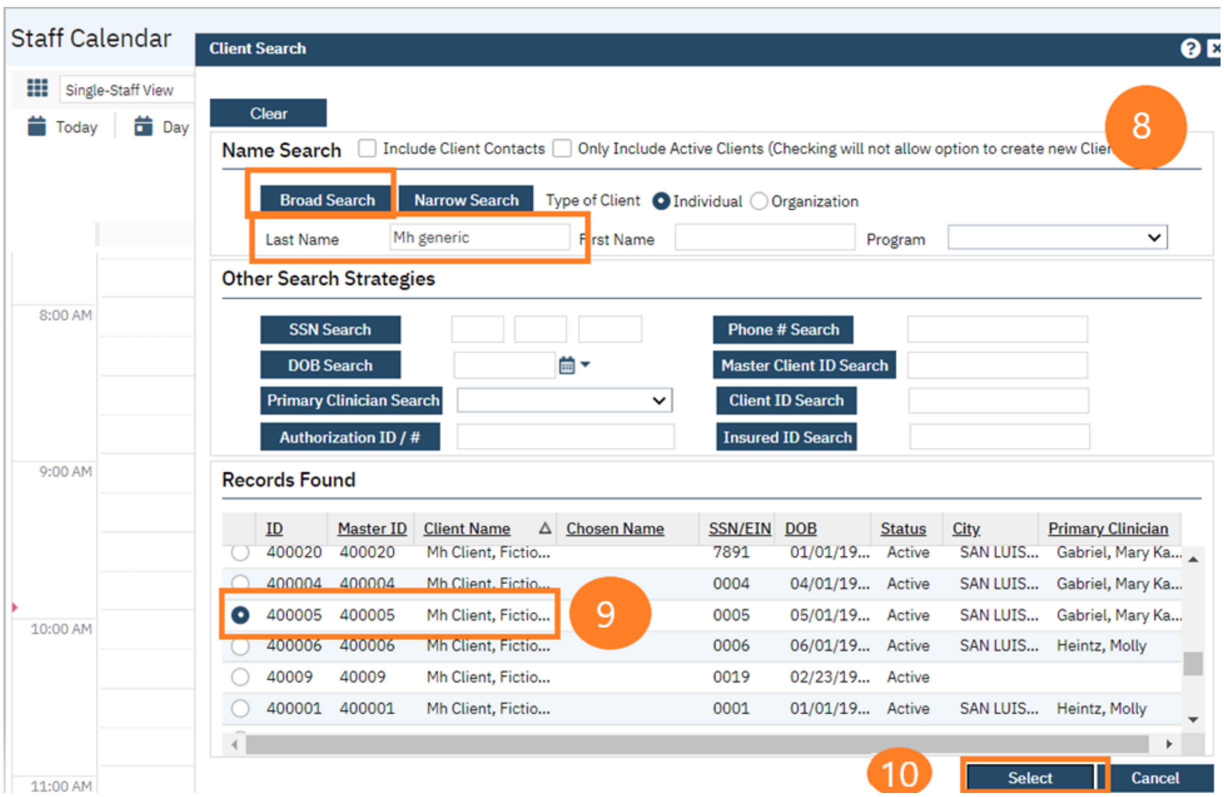
7. Click OK.

If the client record is already opened, skip to Step 11. If the client record is not opened, proceed to Step 8.

8. Enter client last name, enter client first name, select Broad Search. (If you are not in a client's record you will have this option. If you are in client record, name will auto-populate, and you will skip this screen.)

9. Click the radial button next to client record.

10. Click Select.

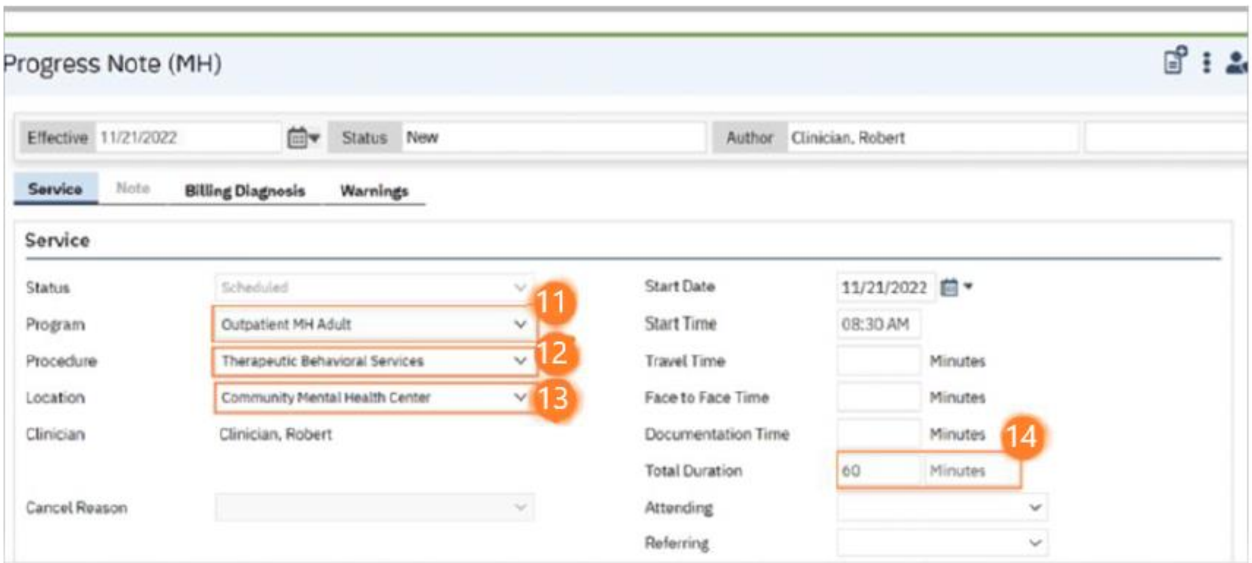


11. In the Service Notes screen, click the drop-down menu in the Program field and select the appropriate program.

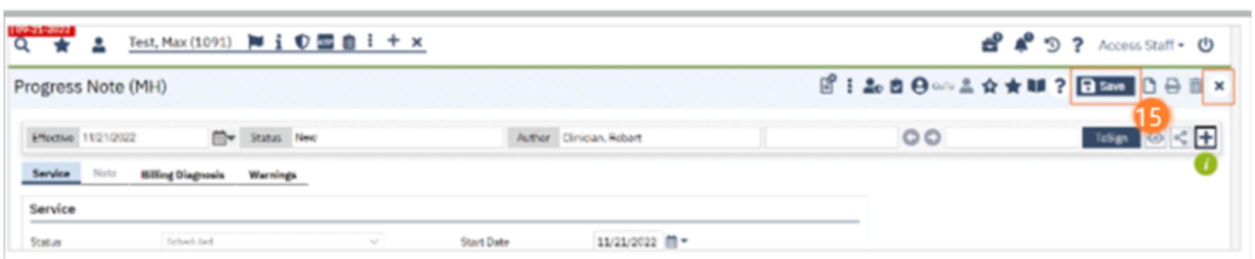
12. Click the drop-down menu in the Procedure field and select the appropriate procedure.

13. Click the drop-down menu in the Location field and select the appropriate location.

14. Click in the Total Duration field and enter the duration of the appointment.

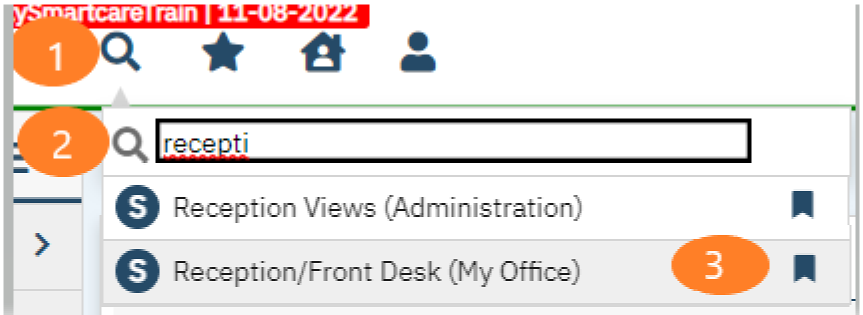


15. Click the Save icon. Click the X icon to close the screen.



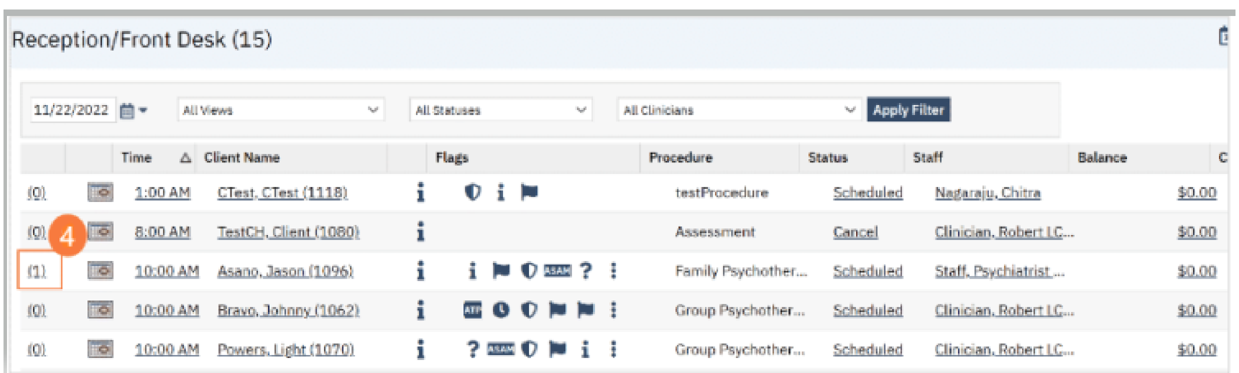
How to Reschedule an Appointment

1. Click the Search icon.
2. Type **Reception** in the search bar.
3. Click to select **Reception-Front Desk (My Office)**



4. In the Reception/Front Desk screen, locate the correct client along with correct staff and appointment time. Click the number in parenthesis to the left of the appointment time.

   Note: This number indicates the number of times this appointment has been rescheduled.



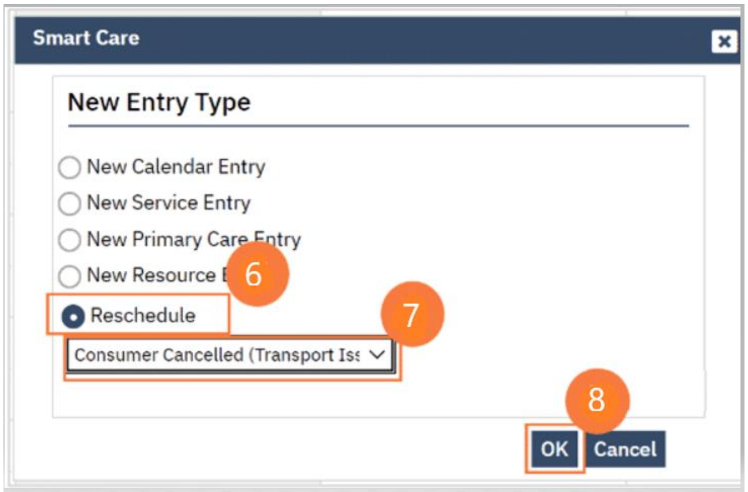
		Time	Client Name		Flags	Procedure	Status	Staff	Balance
(0)		1:00 AM	CTest, CTest (1118)			testProcedure	Scheduled	Nagaraju, Chitra	$0.00
(0)		8:00 AM	TestCH, Client (1080)			Assessment	Cancel	Clinician, Robert LC...	$0.00
(1)		10:00 AM	Asano, Jason (1096)		ASAM ?	Family Psychother...	Scheduled	Staff, Psychiatrist ...	$0.00
(0)		10:00 AM	Bravo, Johnny (1062)			Group Psychother...	Scheduled	Clinician, Robert LC...	$0.00
(0)		10:00 AM	Powers, Light (1070)		? ASAM	Group Psychother...	Scheduled	Clinician, Robert LC...	$0.00

5. This will take you to the Staff Calendar screen to allow you to select a new appointment time. Click and drag your mouse on the calendar timeslot you want to book.

6. In the New Entry Type window, click the radio button for Reschedule**.**

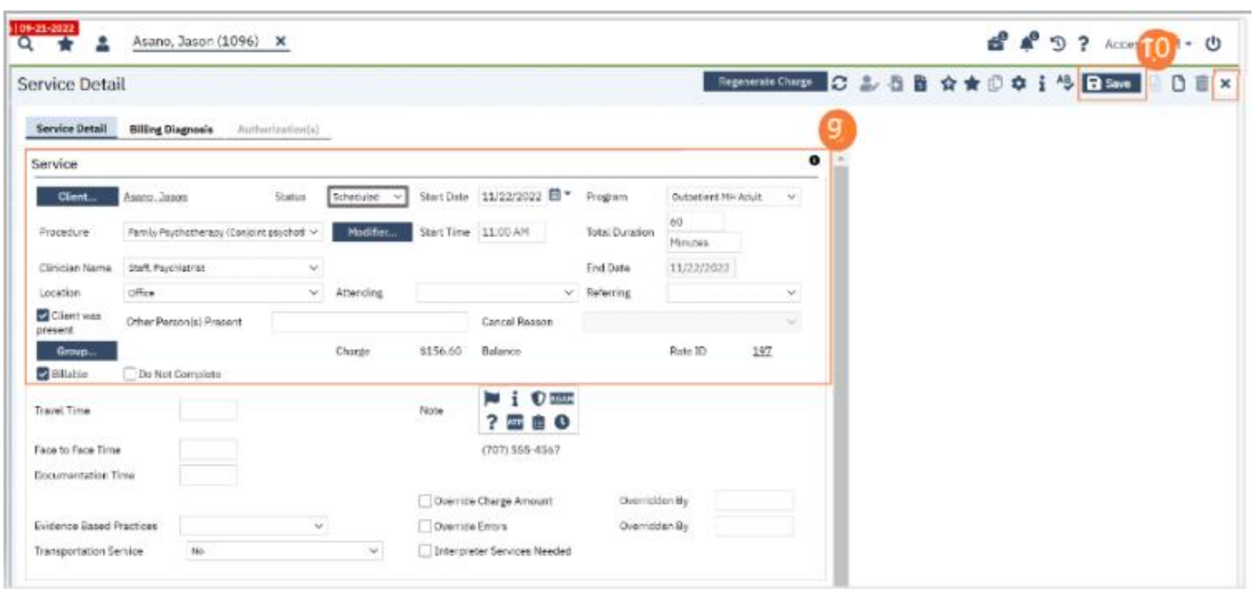
7. Click to select the reason for the reschedule.

8. Click OK.



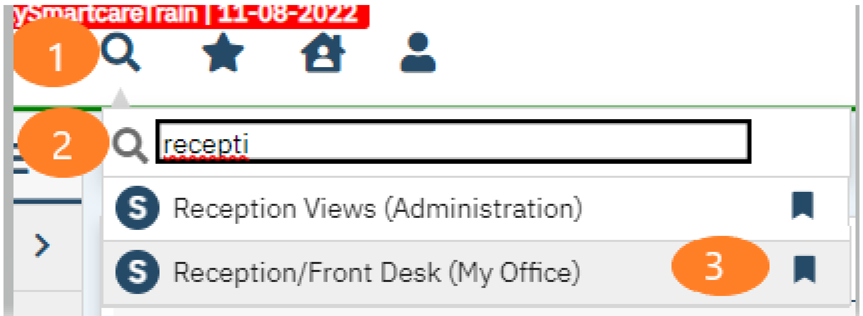
9. The Service Entry window will open, ensure all the information is correct.

10. Click Save to reschedule the appointment. Click the X to close.

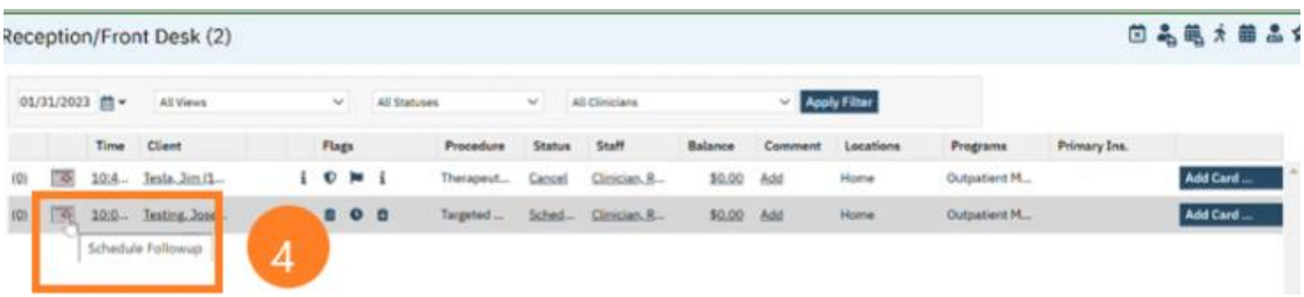


How to Schedule a Follow-Up Appointment

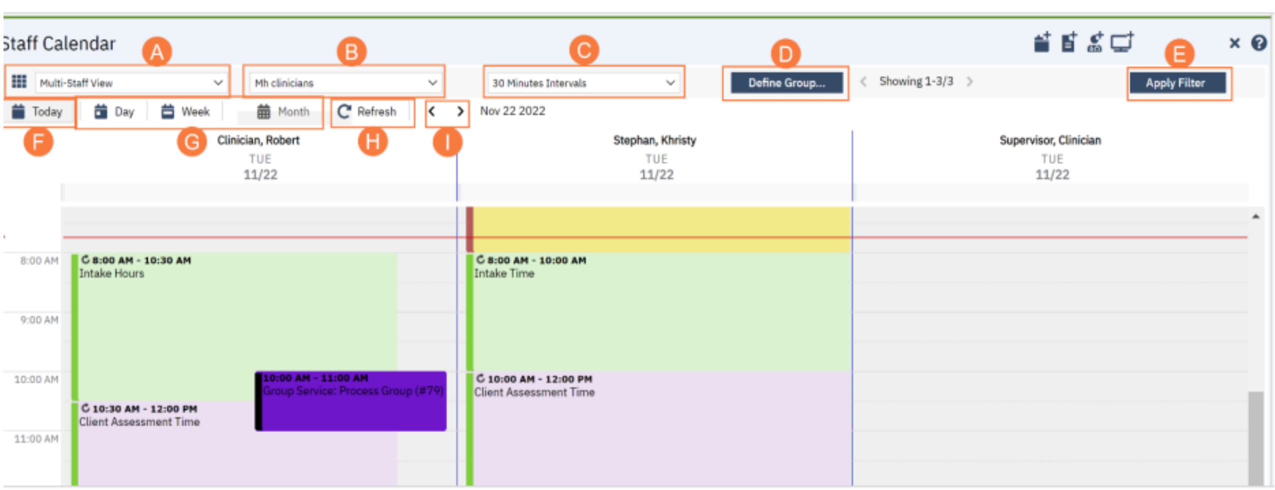
1. Click the Search icon.
2. Type **Reception** in the search bar.
3. Click to select **Reception-Front Desk (My Office)**



4. In the Reception/Front Desk screen, locate the correct client along with correct staff and appointment time. Click the Follow-Up icon (located to the left of the Time column.)



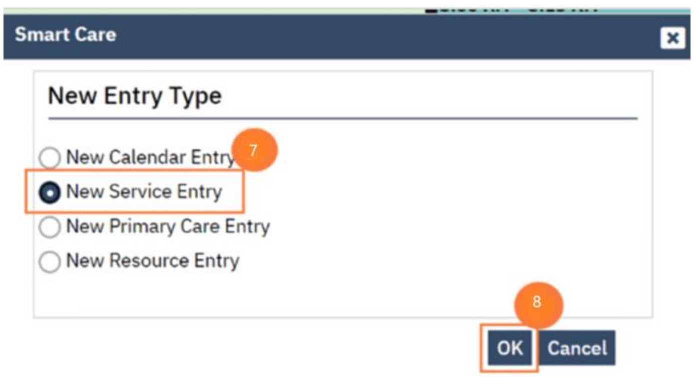
5. Staff Calendar will open. Use the > button to change date forward. (I)



6. Click and drag your mouse on the calendar timeslot you want to book.

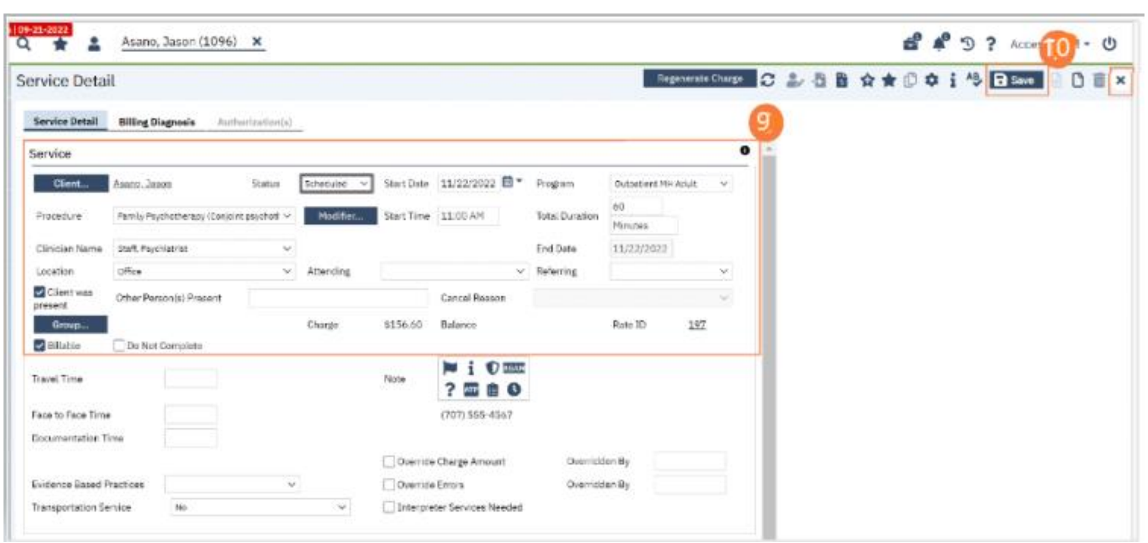
7. In the New Entry Type pop-up, select the New Service Entry radio button.

8. Click OK.



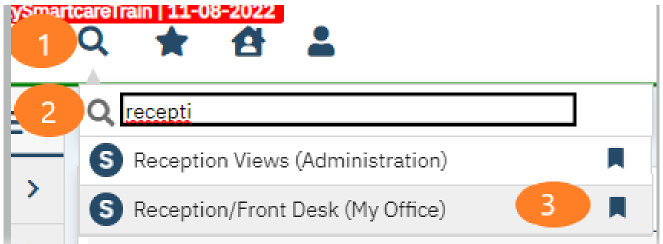
9. The Service Entry window will open, ensure all the information is correct.

10. Click the Save icon. Click the X icon to close the screen.

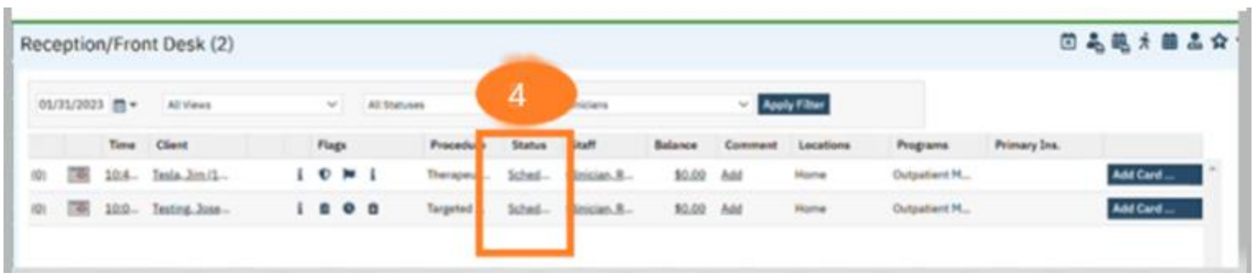


How to Document a No-Show

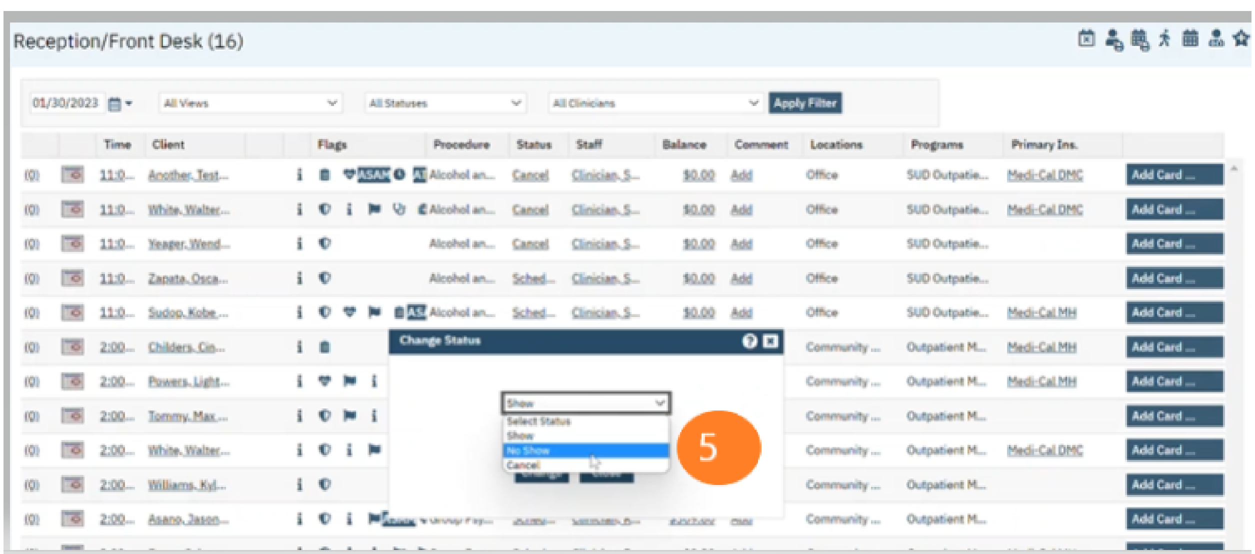
1. Click the Search icon.
2. Type **Reception** in the search bar.
3. Click to select **Reception-Front Desk (My Office)**



4. In the Reception/Front Desk screen, locate the correct client along with correct staff and appointment time. Click on the Scheduled link in Status column.



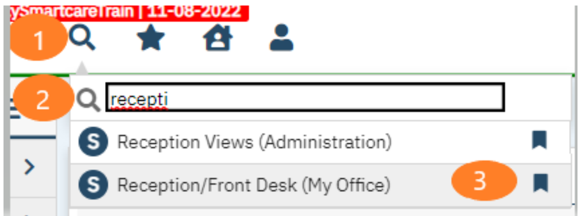
5. Select No Show. Click OK



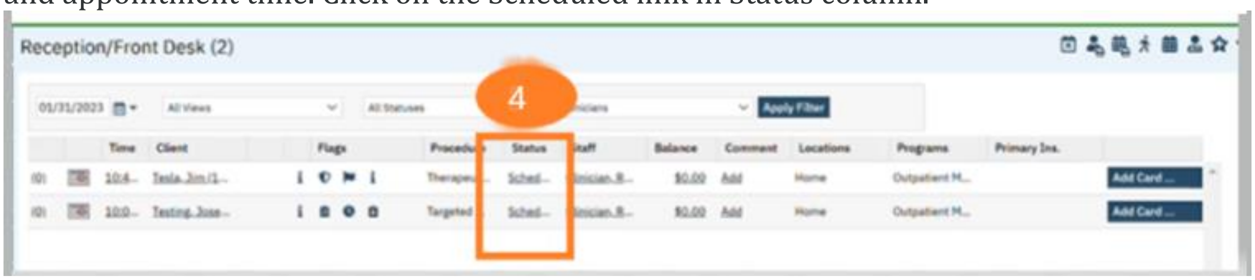
6. Once you have indicated client was a no-show, it will display as “No Show” on the staff’s Appointments for Today widget.

How to Cancel an Appointment

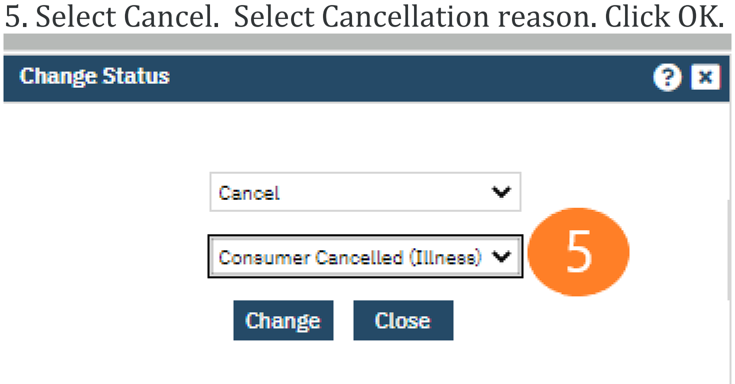
1. Click the Search icon.
2. Type **Reception** in the search bar.
3. Click to select **Reception-Front Desk (My Office)**



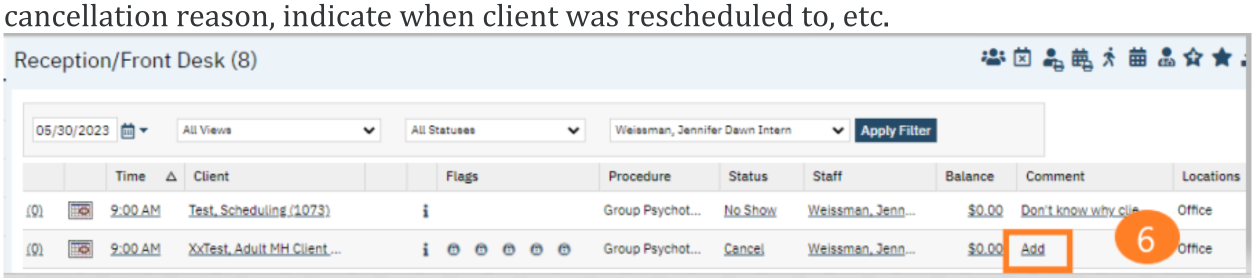
4. In the Reception/Front Desk screen, locate the correct client along with correct staff and appointment time. Click on the Scheduled link in Status column.

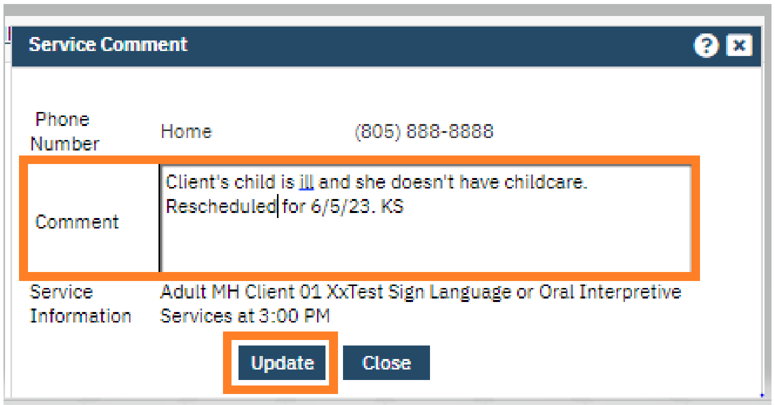


5. Select Cancel. Select Cancellation reason. Click OK.



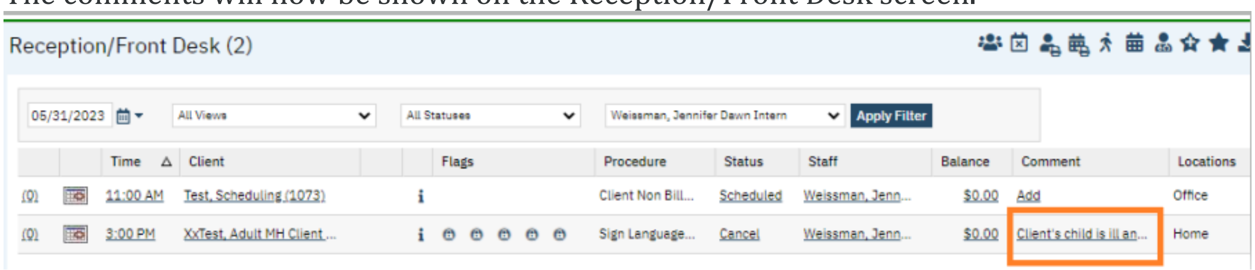
6. You may click the Add link to open a comment box where you can elaborate on the cancellation reason, indicate when client was rescheduled to, etc.



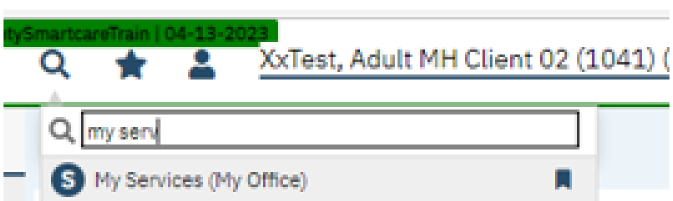


Note: If there is a phone number that has been entered into the Client Information screen, it will display here in the Comment box in the Phone Number field.

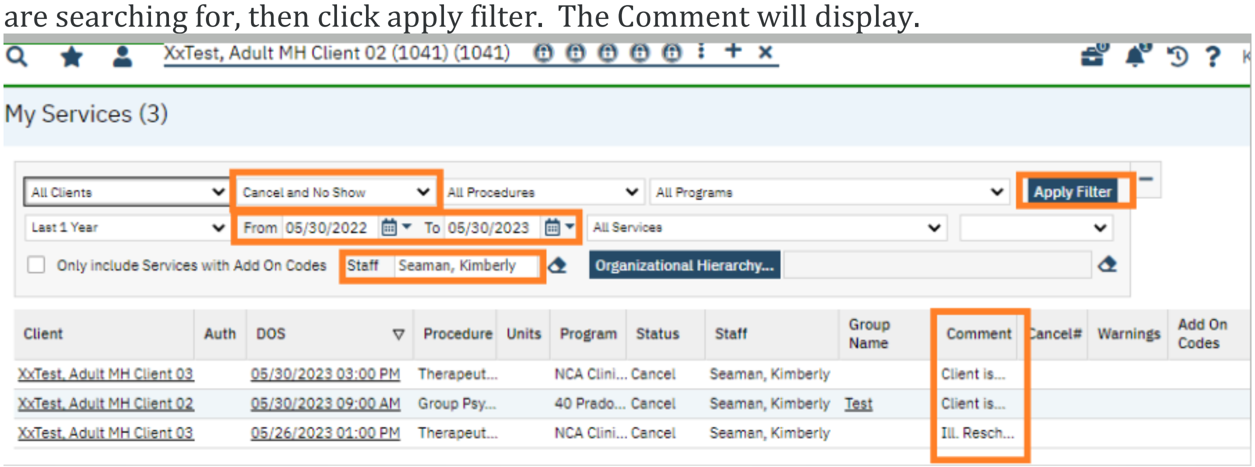
The comments will now be shown on the Reception/Front Desk screen.



You can also view it from the **My Services (My Office)** screen.



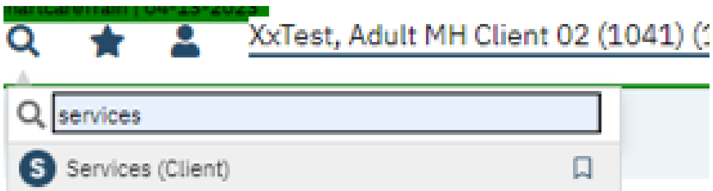
Change the All-Statuses field to cancel and no show, select the date range and staff you are searching for, then click apply filter. The Comment will display.



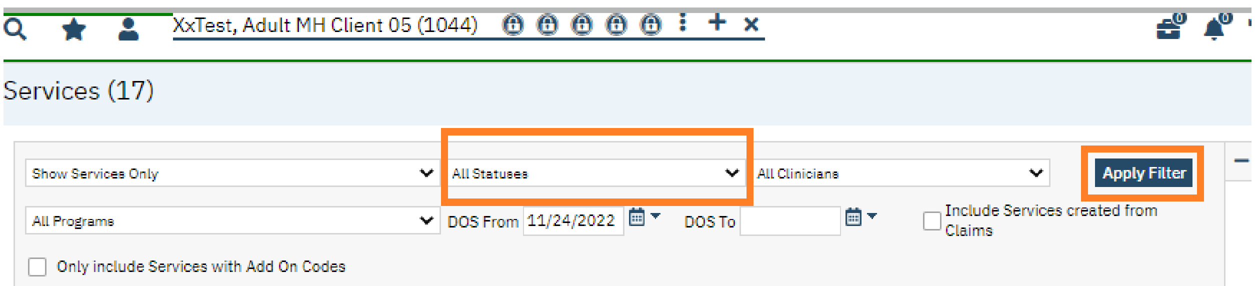
How to view Cancelled & No-Show Appointments and see when they were cancelled.

(AZ equivalent=Scheduled services tab)

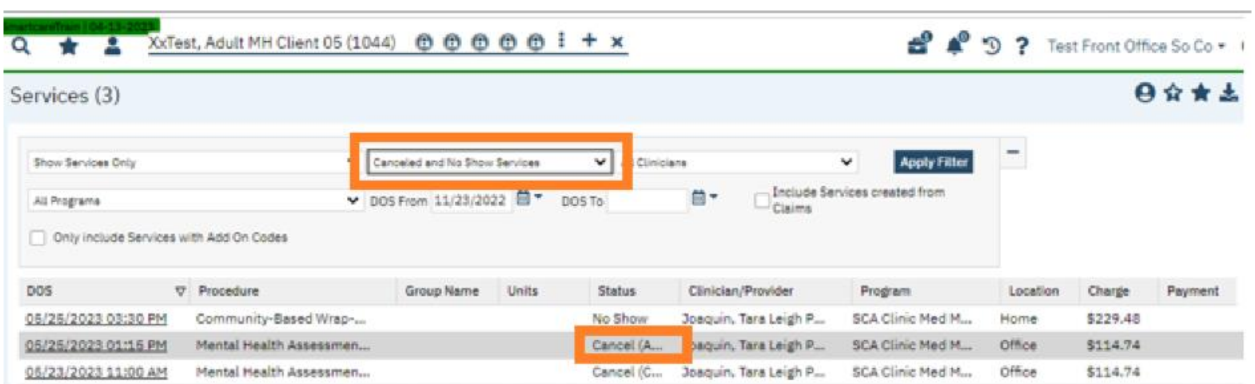
With the client open, search **Services** and select **Services (Client)**.



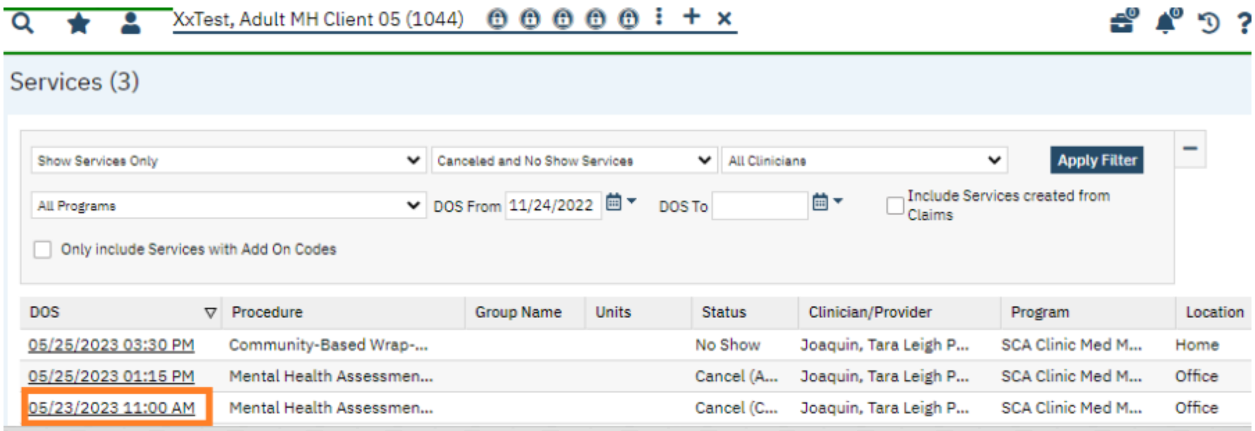
In the All-Status field, there is a drop-down to show canceled/no shows, completed, scheduled, and show services. Select canceled and no-show services and click Apply Filter. (You can also search for specific date range, program, and staff.)



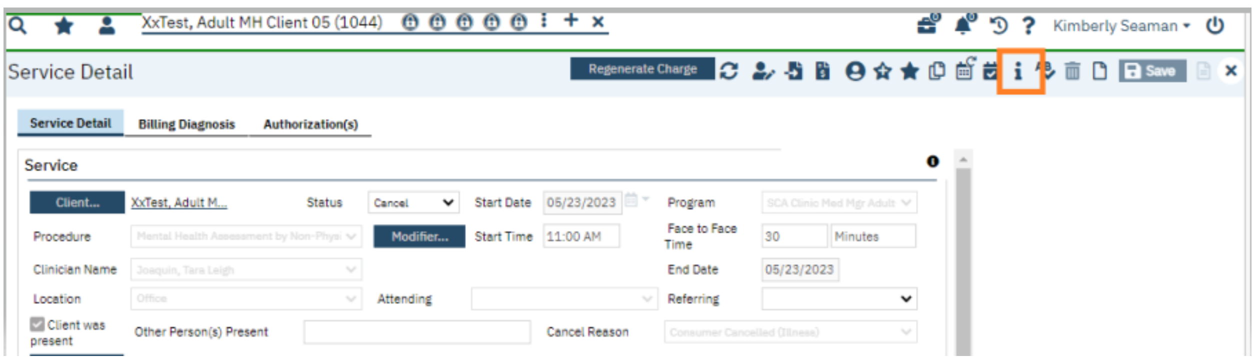
Hover over the status field in the list area and it will show the reason selected when the appointment was cancelled.



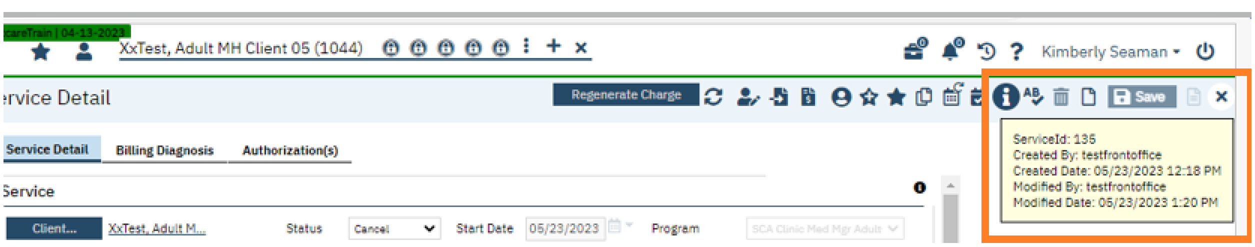
Click the DOS link and the Service Note for the cancelled appointment will open.



Hover your cursor over the i icon.

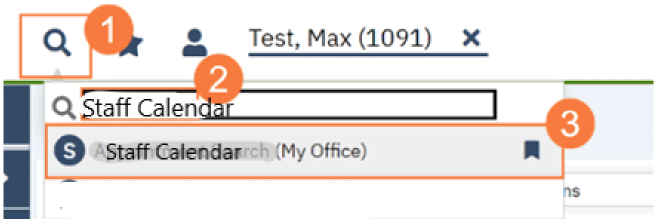


You will see when it was originally scheduled and by who, and when it was cancelled and who cancelled it in SmartCare.

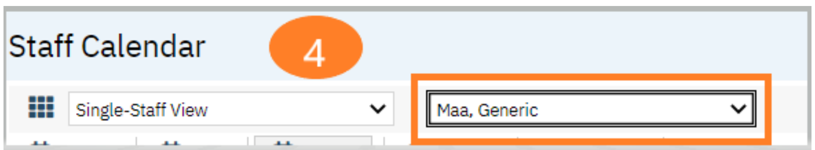


How to Schedule Non-Client Time (meetings, holidays, trainings, etc.)

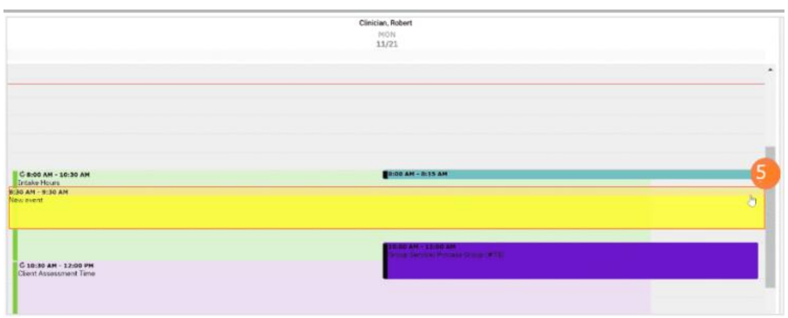
1. Click the Search icon.
2. Type **Staff Calendar** in the search bar.
3. Click to select **Staff Calendar (My Office)**



4. Select the staff you want to schedule for.

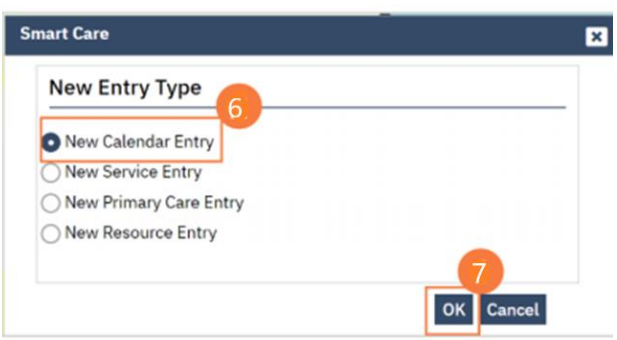


5. From the Staff Calendar screen, click and drag your mouse on the calendar timeslot you want to book.



6. In the New Entry Type pop-up, select the New Calendar Entry radio button.

7. Click OK.

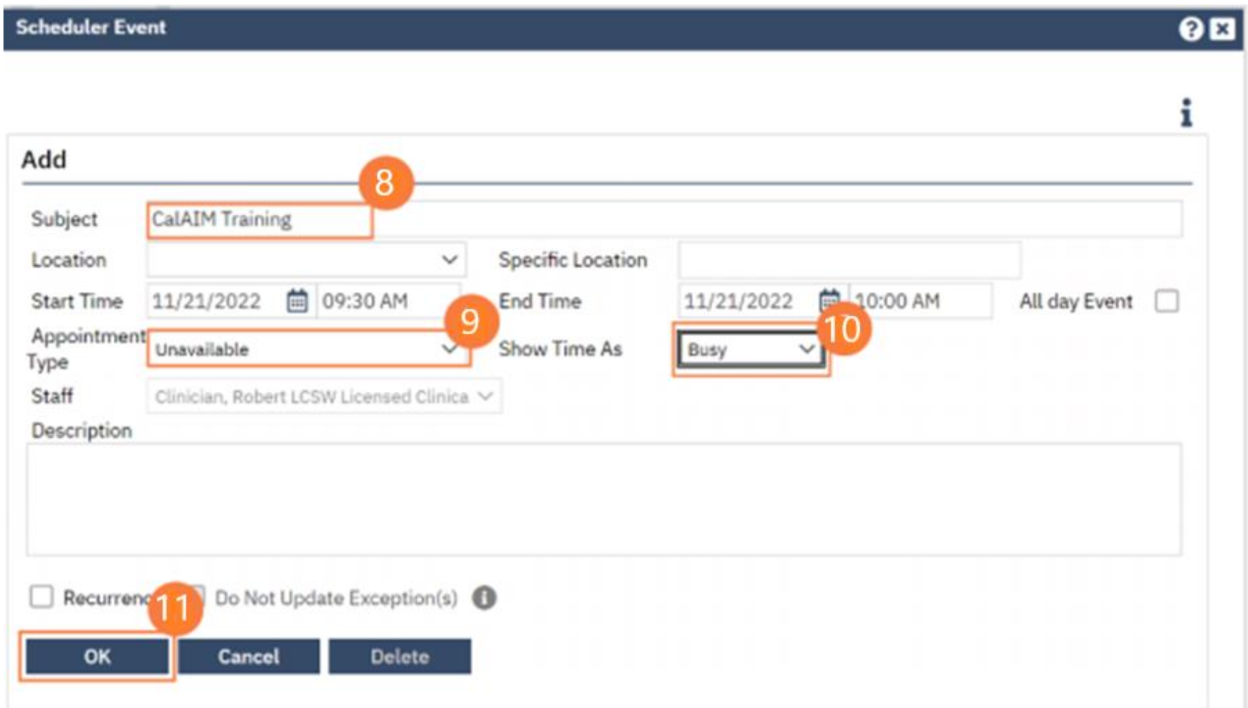


8. The Scheduler Event window will open, click in the Subject field, and enter the subject for the calendar entry.

9. Click the drop-down menu in the Appointment Type field and select the correct option**.**

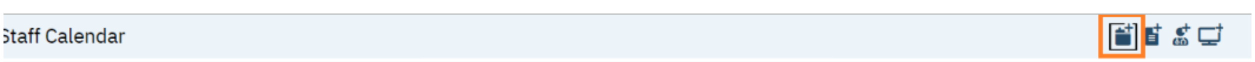
10. Click the drop-down menu **i**n the Show Time As field and select the correct option.

11. Click OK.



Alternate Method:

You can also click the "Click to Create New Calendar Entry" button (instead of clicking and dragging on desired time in schedule) and this same window will appear, however you will need to manually enter in the start date, start time and end time.



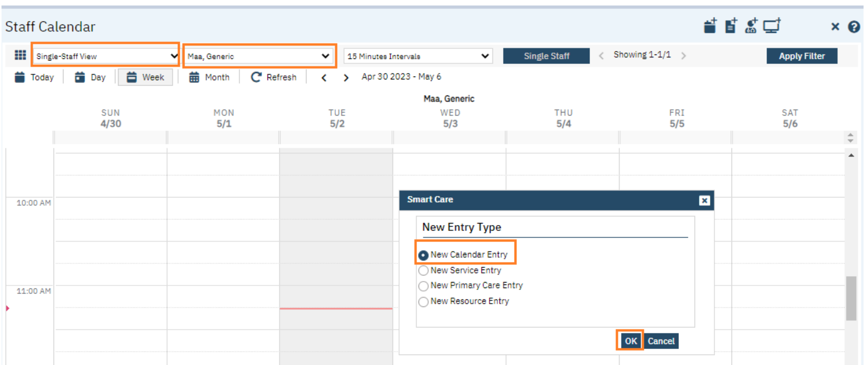
How to Add Reoccurring Events to Staff Calendar

Search **Staff Calendar (My Office)**.

Select Single-Staff View and Staff.

Click and drag your mouse to the desired start date and time of the reoccurring appointment.

Select New Calendar Entry and click OK.



In this window, you need to enter the subject (it doesn't populate when you select an appointment type.

You may enter a location/specific location although it's not required but will make it easier when searching for available appointments at a specific location.

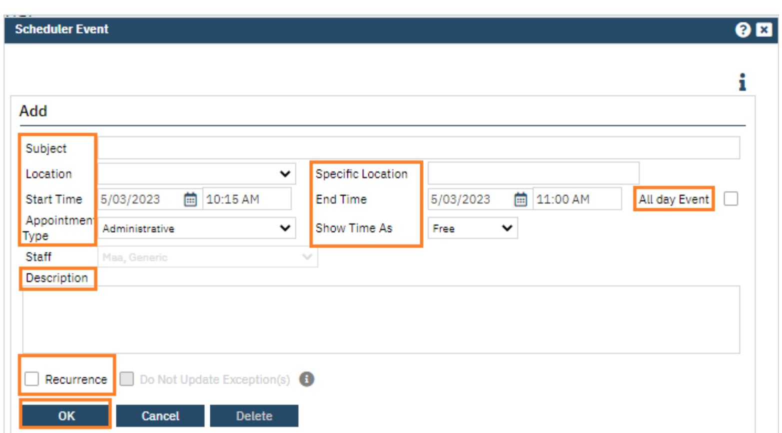
Enter start time and end time information. You can select "all day event" if applicable.

Choose from drop down the appointment type. Note: Right now, Intake is the only available clinic-type appointment in the drop-down menu. We are asking if we can add other options to this menu, like med support follow-up & post-appointment/urgent services appointment.

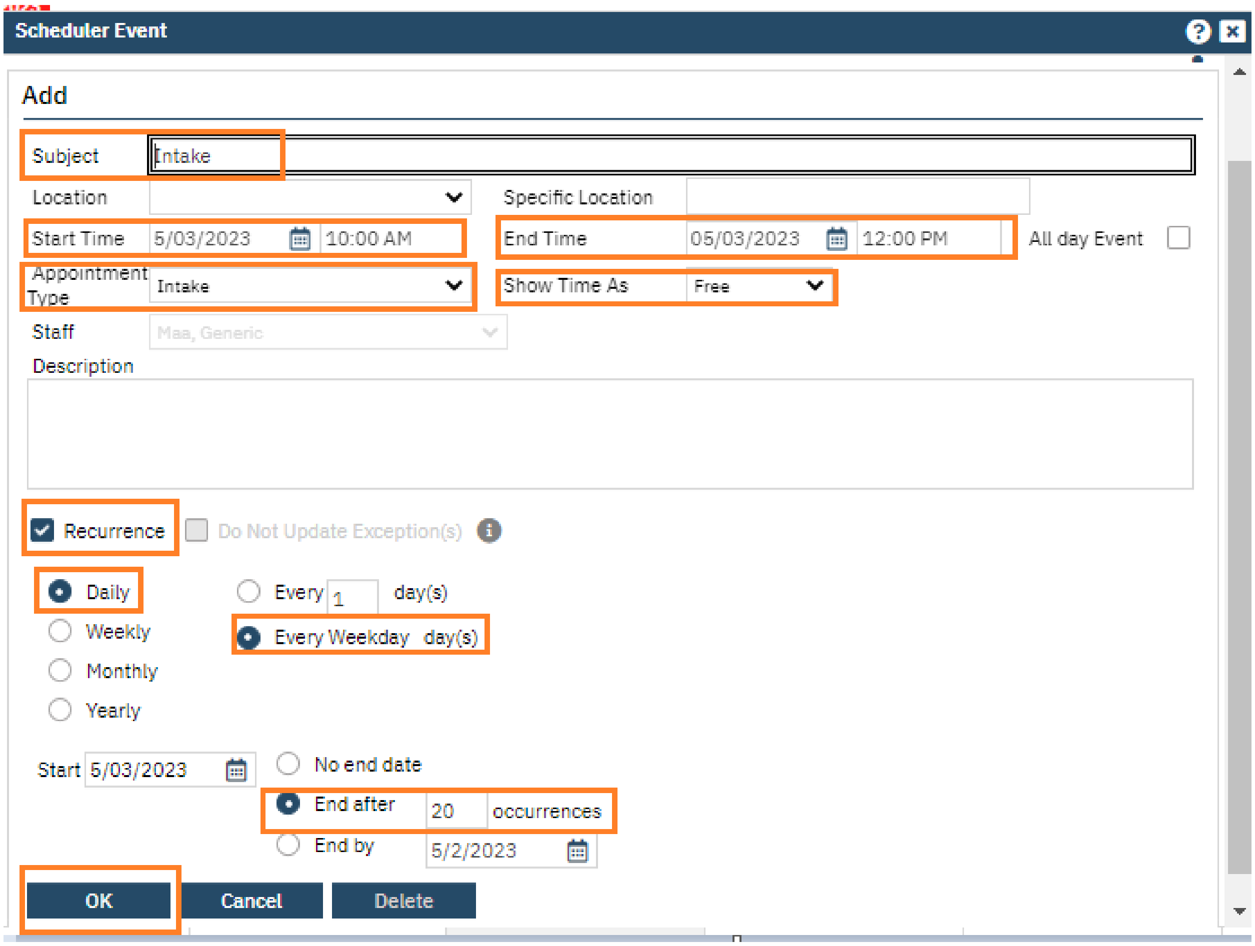
Select from drop down for "show time as".

You may enter a description, but not required.

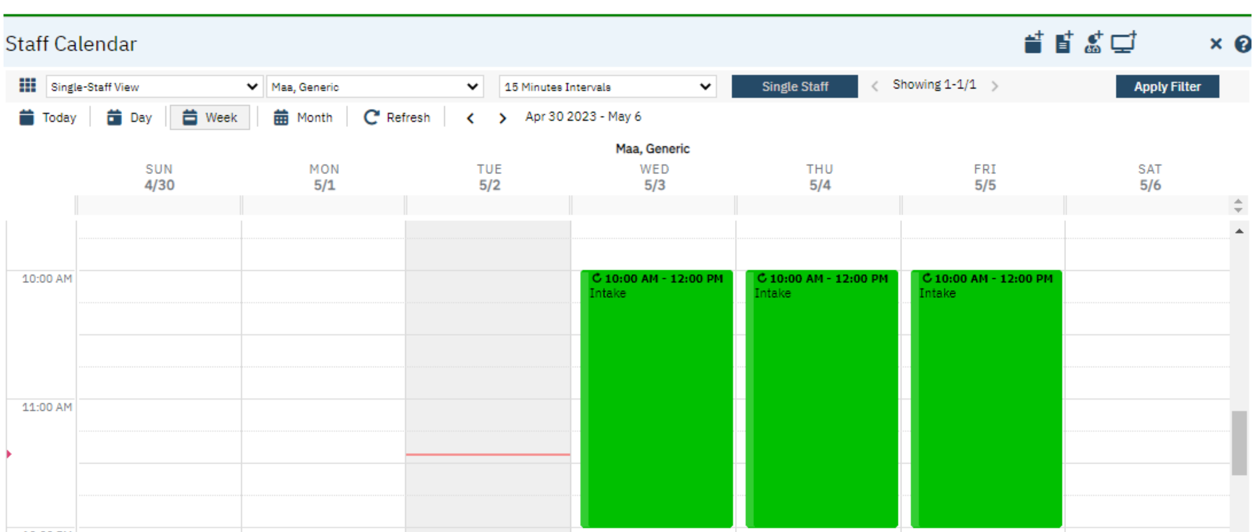
Select choose recurrence and click OK.



In this example, I am scheduling a reoccurring intake from 10am to 12pm, every weekday from 5/03/2023, for 20 occurrences. (You can specify an end date if you choose.)

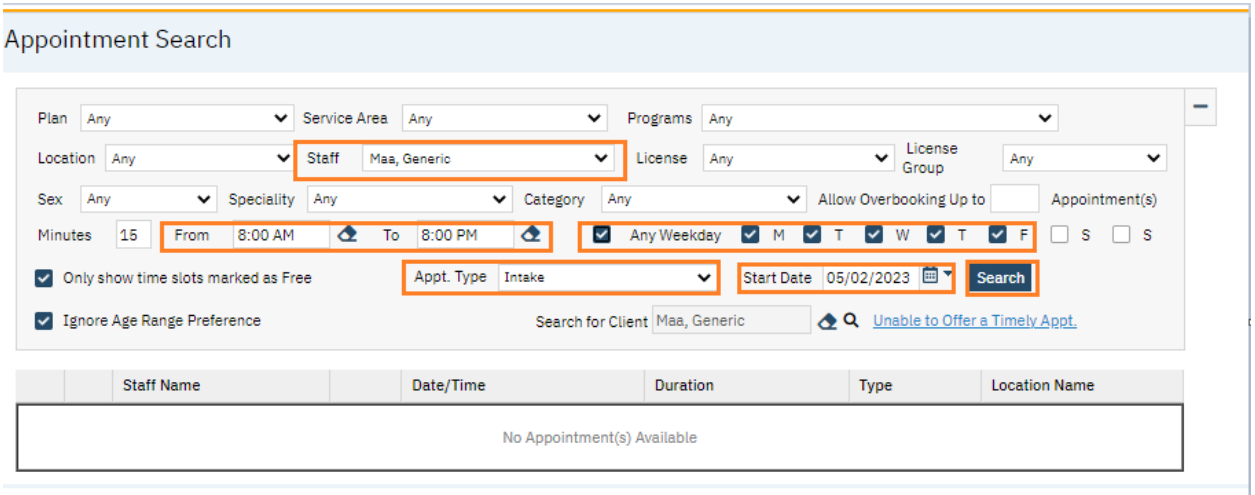


This is how it will be displayed on the Staff's calendar.

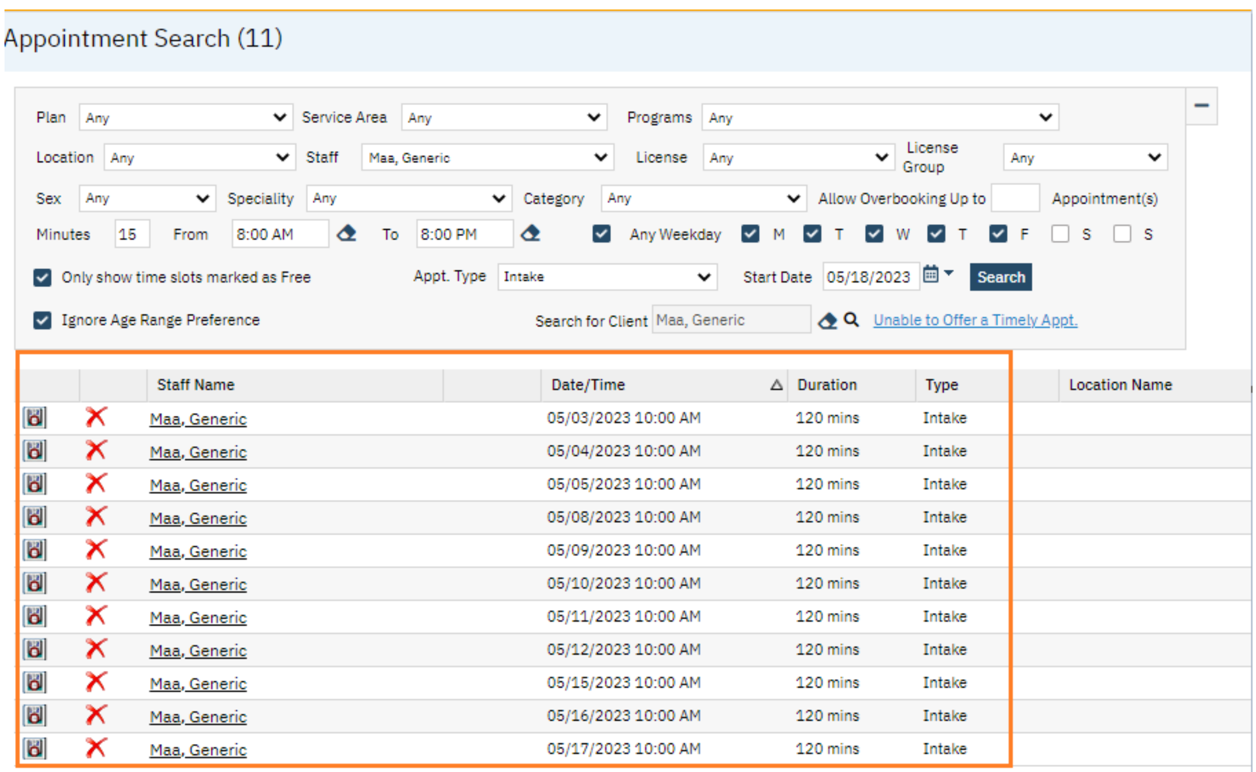


Now you can do **Appointment Search (My Office)**.

Enter all search parameters and click Search.

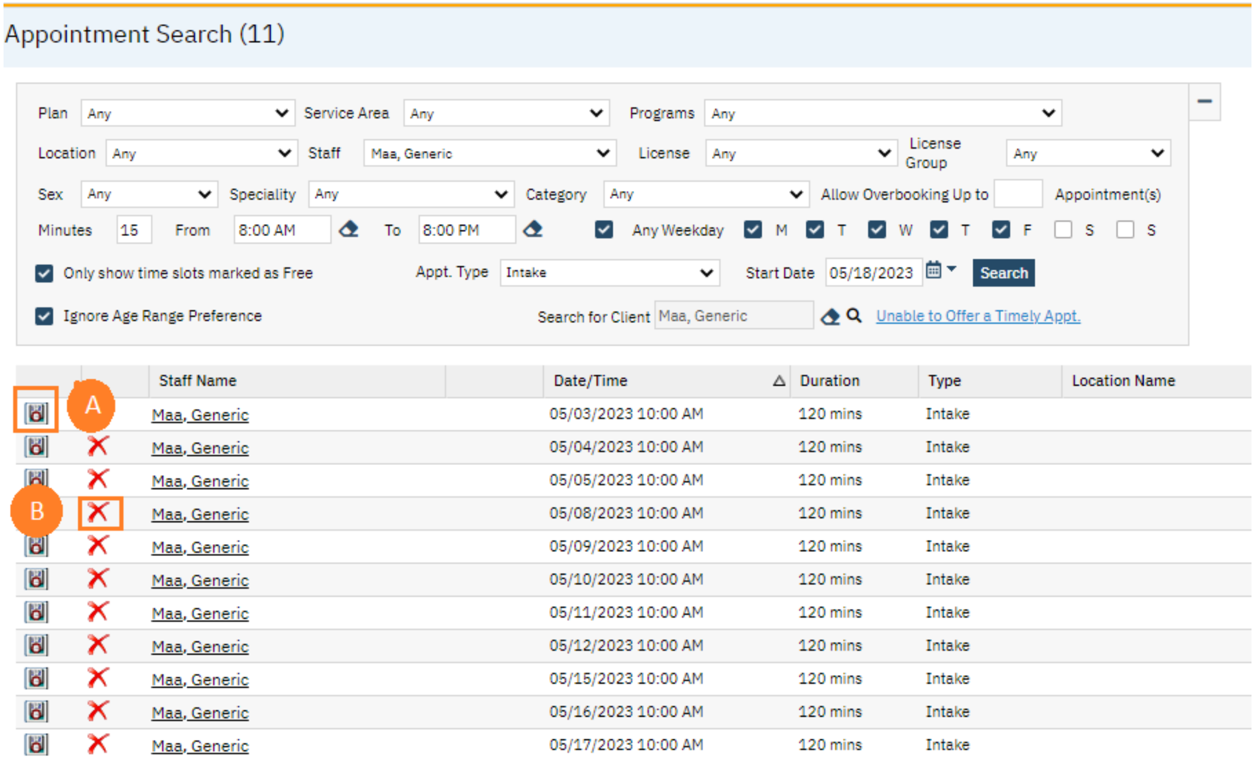


You will now see all available intake appointments for that staff.



If you would like to schedule, you click A.

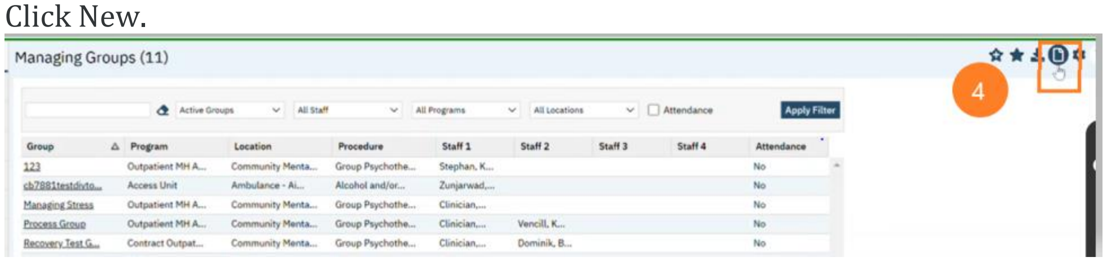
If client declines offered appointment, you click B and select reason from drop-down. (Central Access function tied to timeliness reporting.)



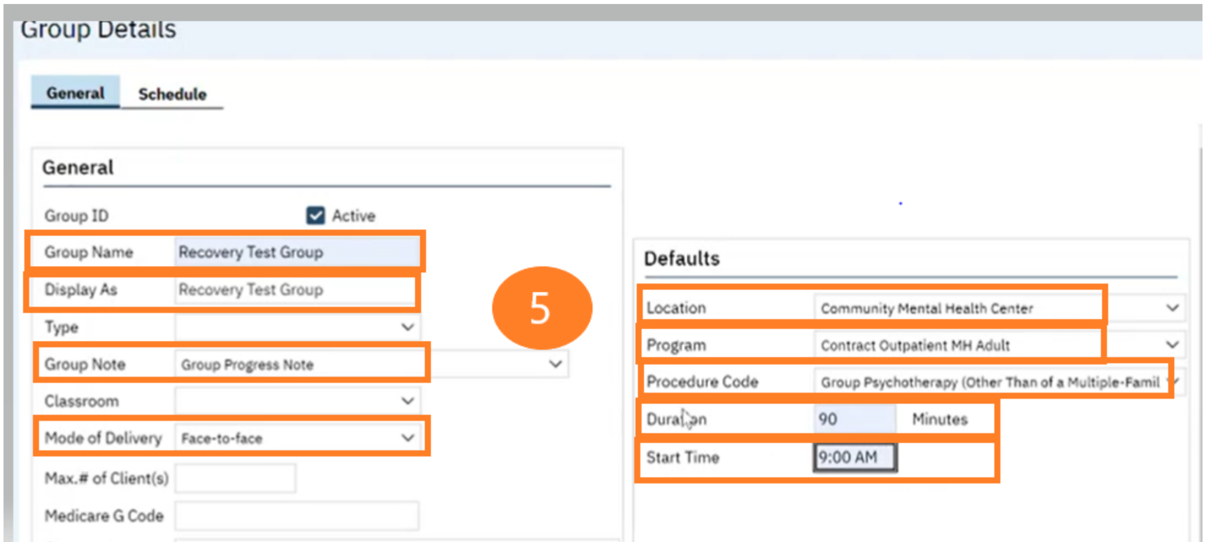
How to Schedule a Single Occurrence Group & a Reoccurring Group

1. Click the Search icon**.**
2. Type **Managing** in the search bar. Note: you can also type **Group** and get the same result.
3. Click to select **Managing Groups (My Office)**.

4. Click New.



5. Enter all group details in the General Tab.



6. Locate the Client section towards the bottom of the Group Details screen. Click Add Clients.

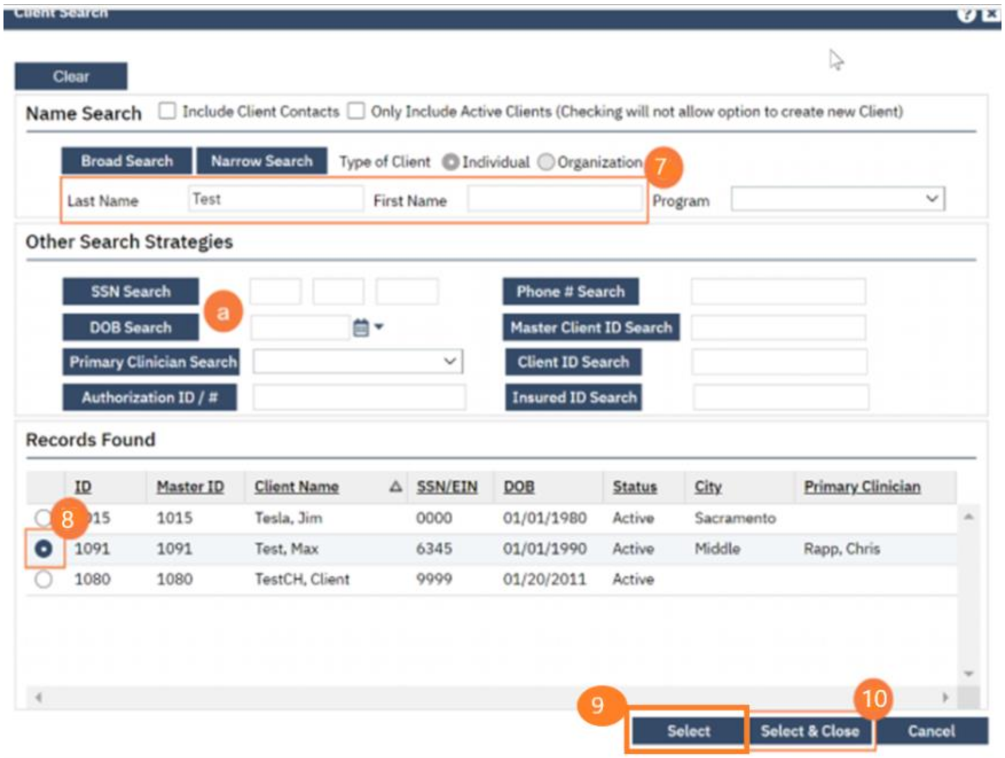
7. The Client Search window will open, click in the Last Name and First Name fields to enter the corresponding information. Select Enter on your Keyboard to populate search results.

   a. You can also use the Other Search Strategies fields to search by SSN, DOB, etc.

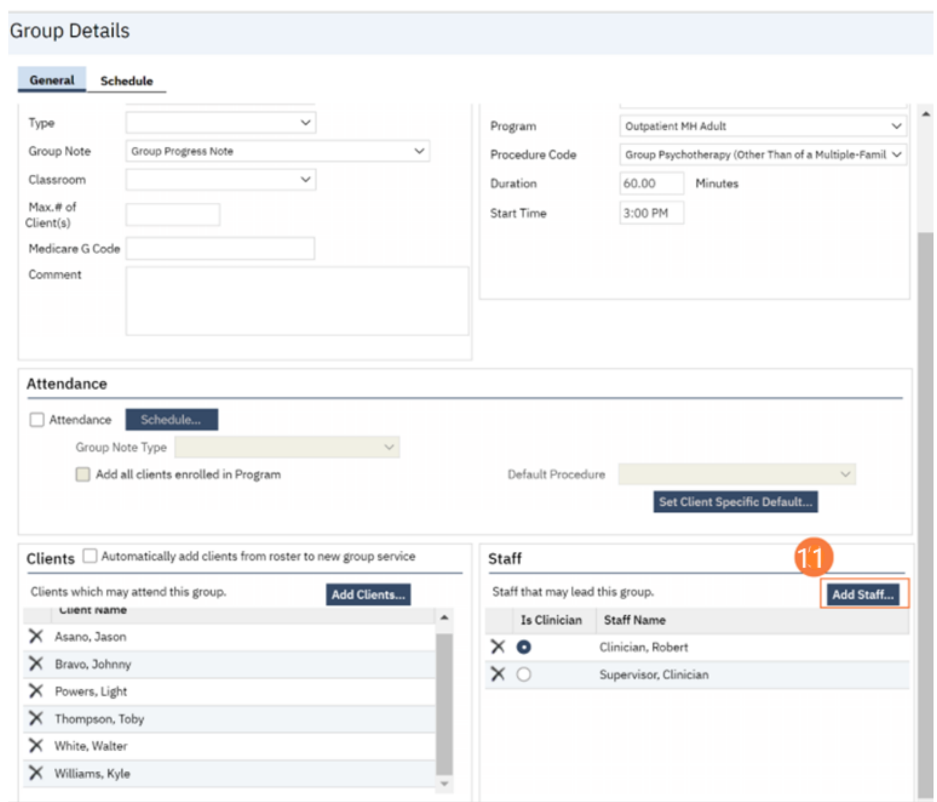
8. Click the radio button to the left of the client you want to select.

9. Click Select. Add each client, one at a time by selecting the radial button next to client's name and clicking select.

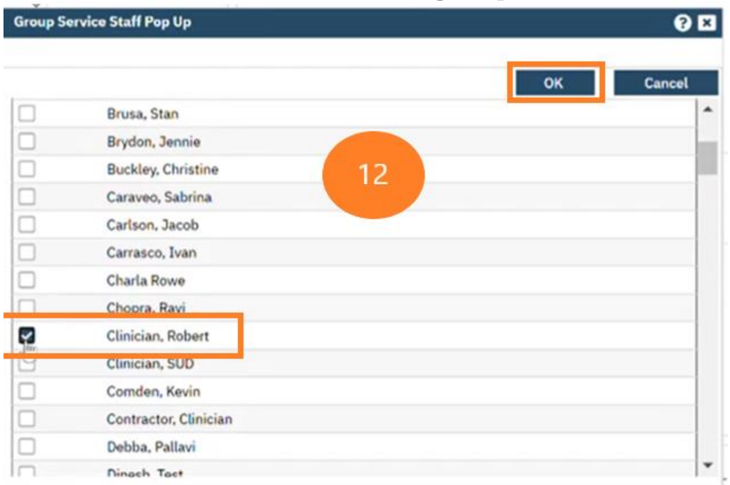
10. Once you have selected the last client to add to the group, Click Select & Close.



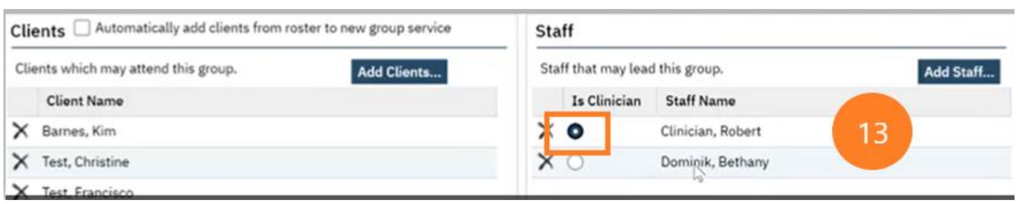
11. Locate the Staff section towards the bottom of the Group Details screen. Click Add Staff.



12. Select all staff members for the group, then click OK.

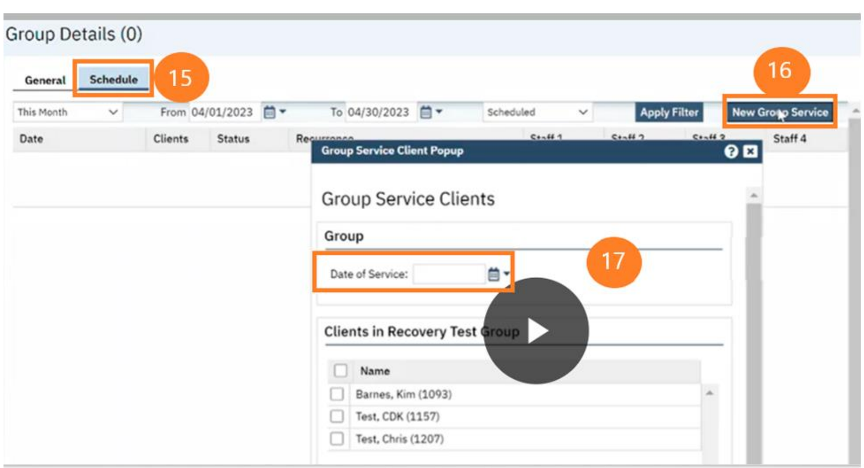


13. Designate lead staff member of group by clicking radial button next to staff member's name.



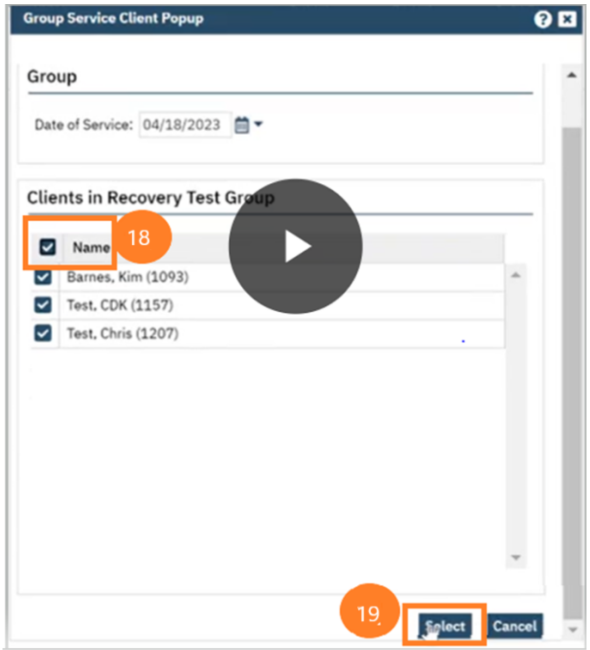
14. Click Save.

15. Go to the Schedule tab.
16. Click New Group Services.
17. Enter date of service.



18. Select clients.

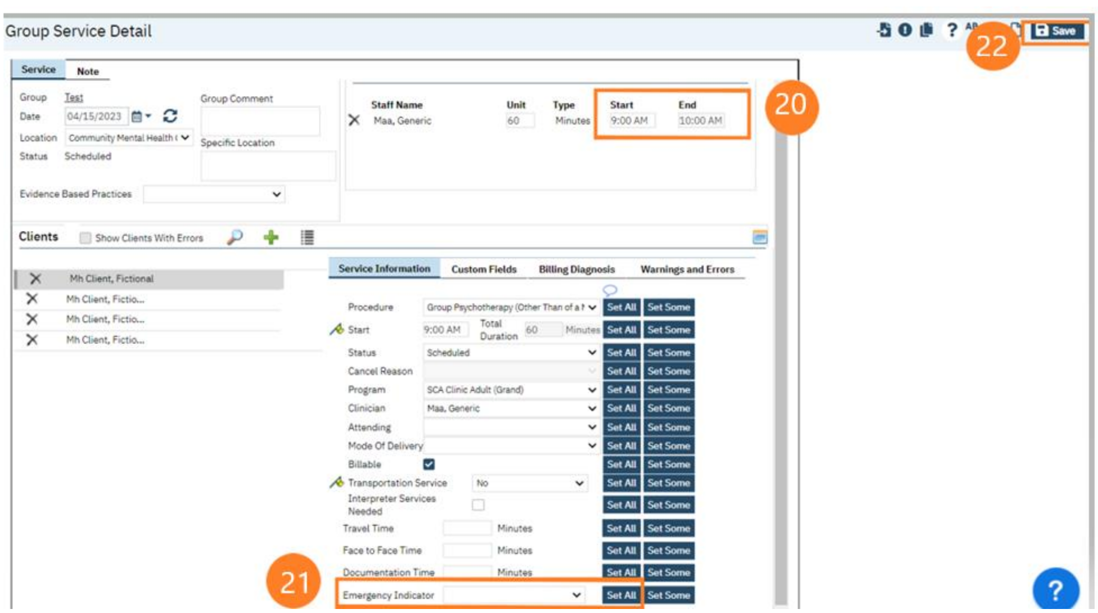
19. Click Select.



20. Enter start and end time for staff.

21. Enter Emergency Indicator and select all under Service Information tab**.**

22. Click Save. A single group will now appear on the staff's calendar.



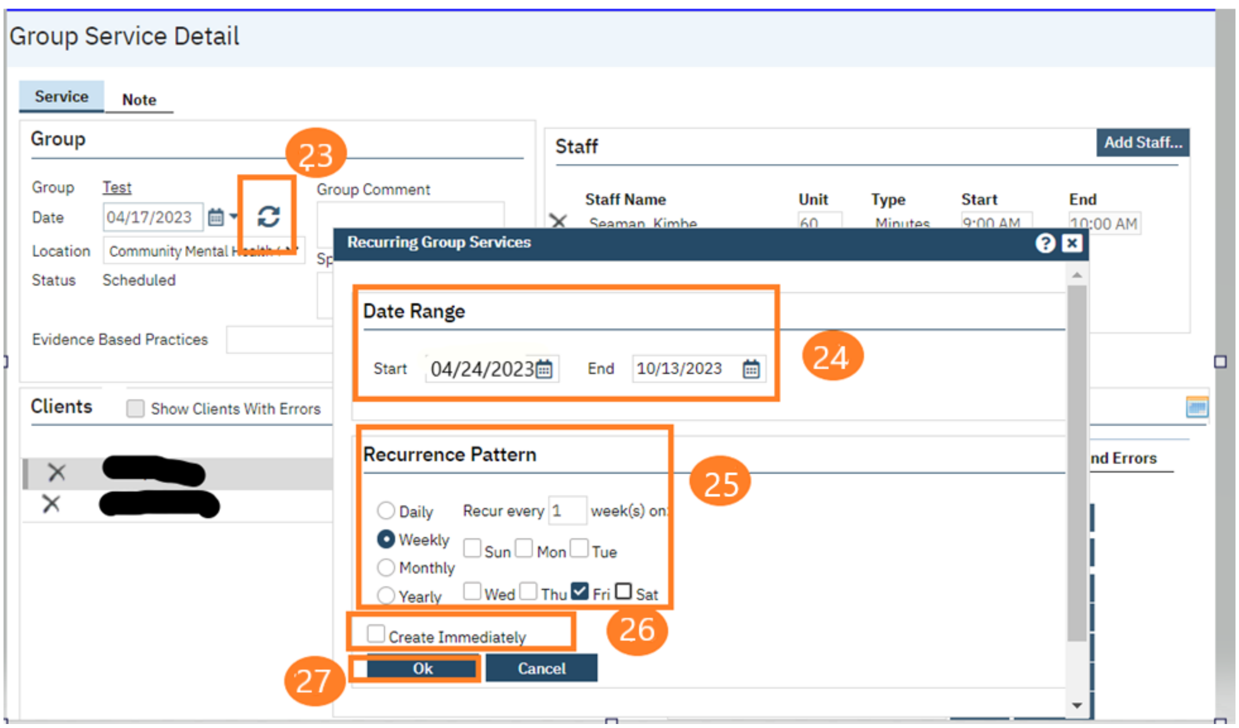
23. To make group re-occurring, click make reoccurring icon.

24. Enter start date and end date. (Start date needs to be the next group date since the first group is already on staff's calendar as a single event.)

25. Specify reoccurrence pattern.

26. Only check the create immediately button if this will be a closed group (you don't anticipate group members changing) and if you don't anticipate staff member changing. If this will be an open group and/or multiple staff facilitating the group, leave this box unchecked.

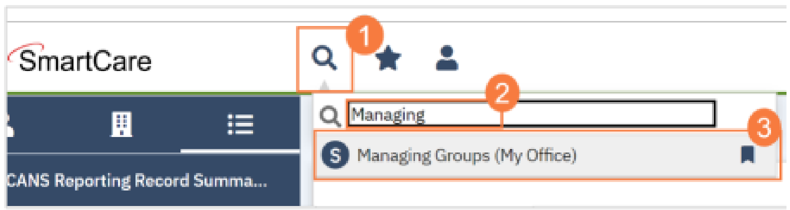
27. Click OK.



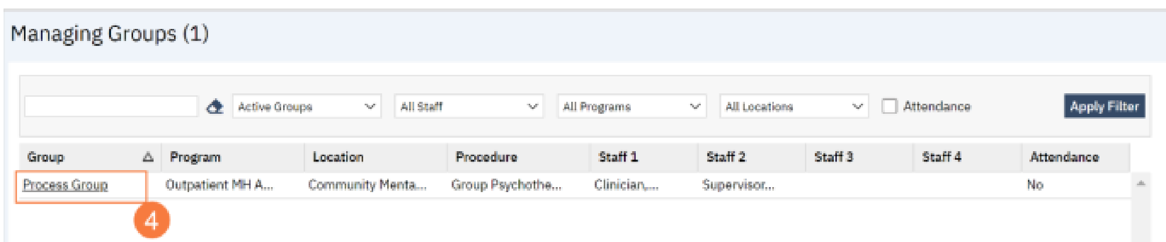
28. Click the X icon to close the screen.

How to Add a Client to a Group

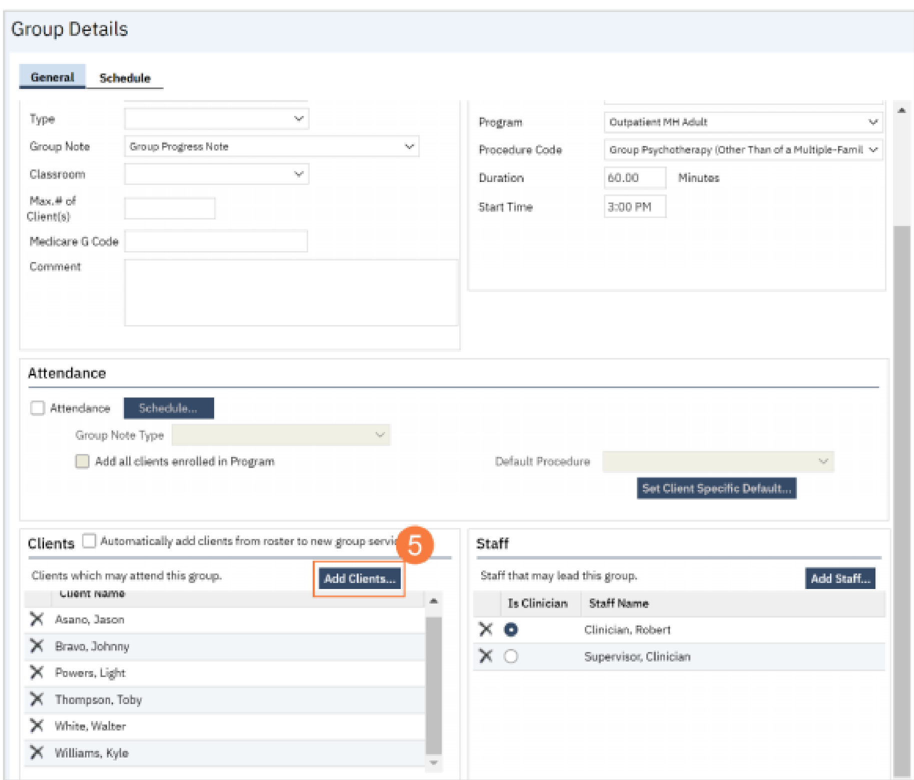
1. Click the Search icon.
2. Type **Managing** into the search bar. Note: you can also type **Group** and get the same result.
3. Click to select **Managing Groups (My Office)**.



4. Click to select the Group you will be adding the client to.



5. Locate the Client section towards the bottom of the Group Details screen. Click Add Clients.

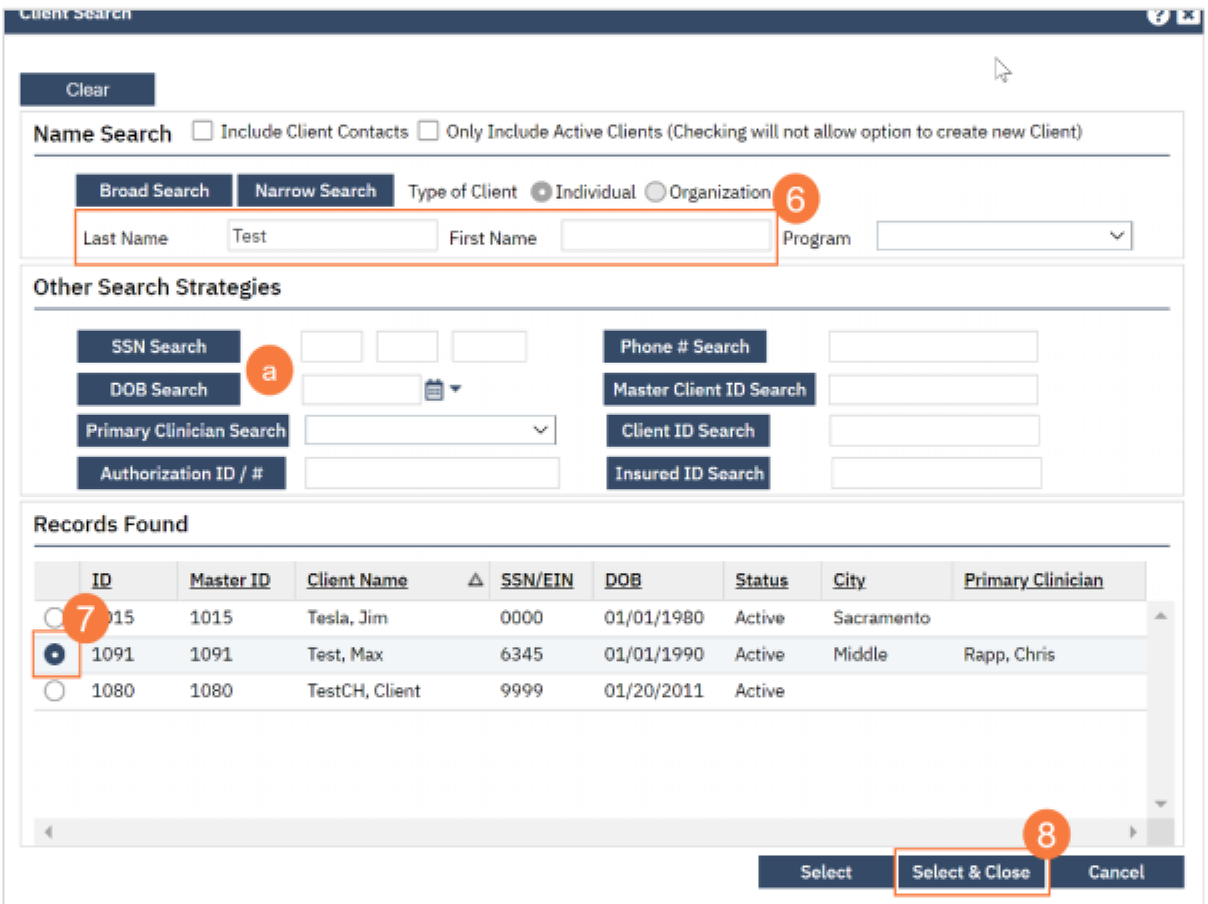


6. The Client Search window will open, click in the Last Name and First Name fields to enter the corresponding information. Select Enter on your Keyboard to populate search results.

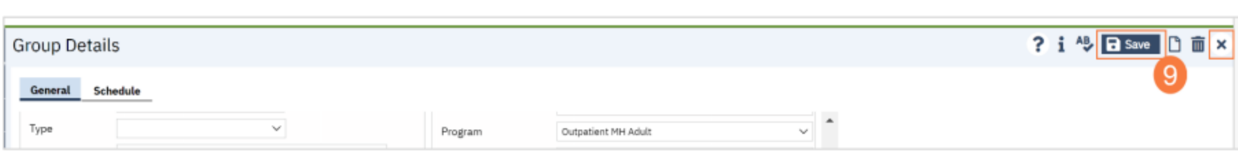
a. You can also use the Other Search Strategies fields to search by SSN, DOB, etc.

7. Click the radio button to the left of the client you want to select.

8. Click Select and Close. This client will be added to the group.

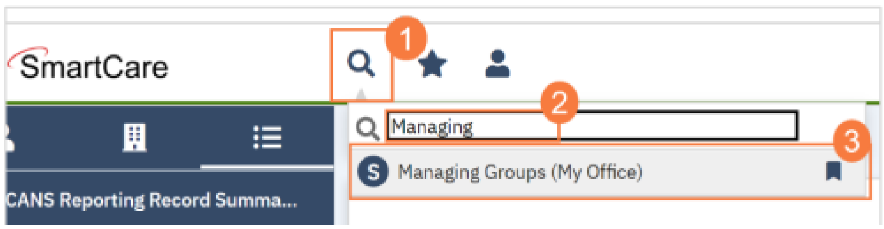


9. Click Save. Click the X to close the screen.

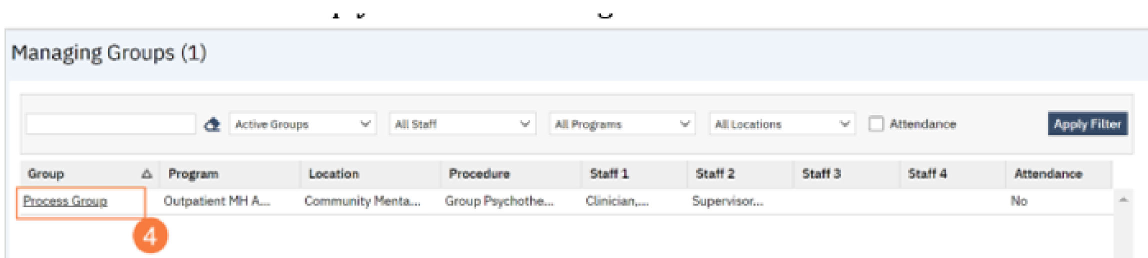


How to Remove a Client from a Group

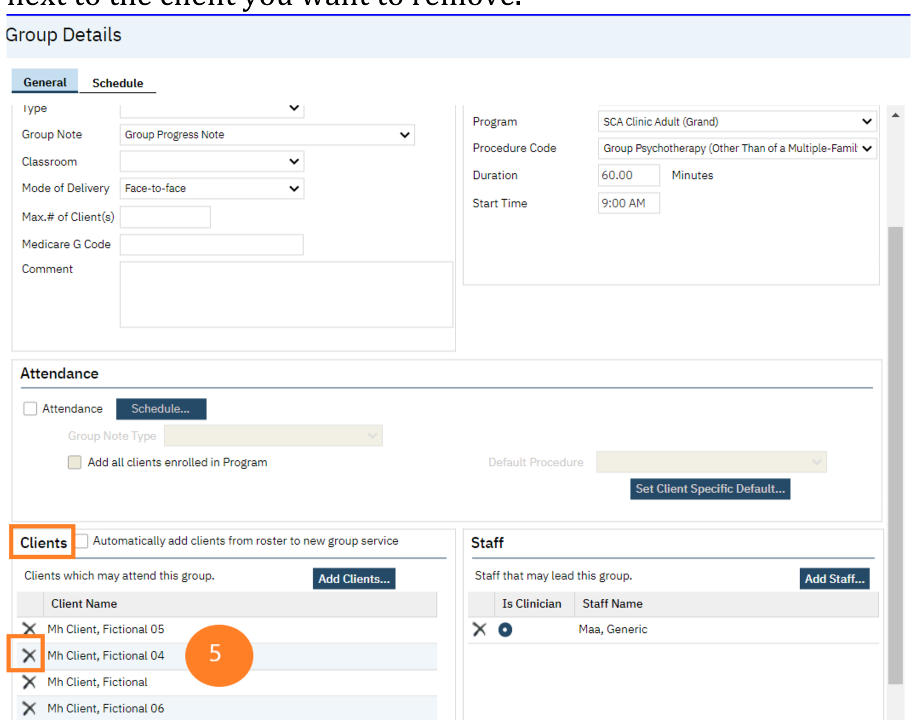
1. Click the Search icon.
2. Type **Managing** into the search bar. Note: you can also type **Group** and get the same result.
3. Click to select **Managing Groups (My Office)**.



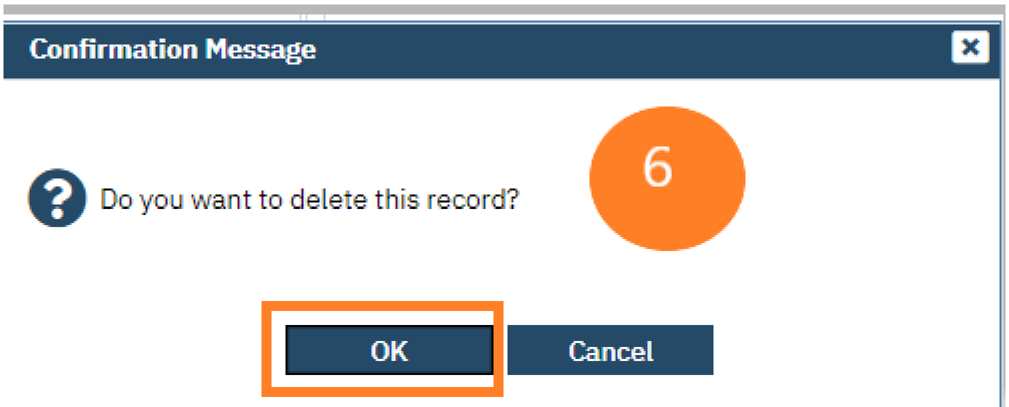
4. Click to select the Group you will be removing the client from.



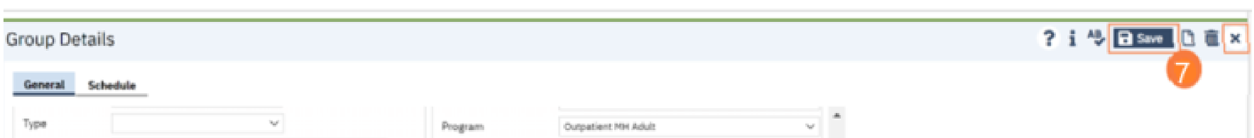
5. Locate the Client section towards the bottom of the Group Details screen. Click the X next to the client you want to remove.



6. A confirmation window will open. Click OK.

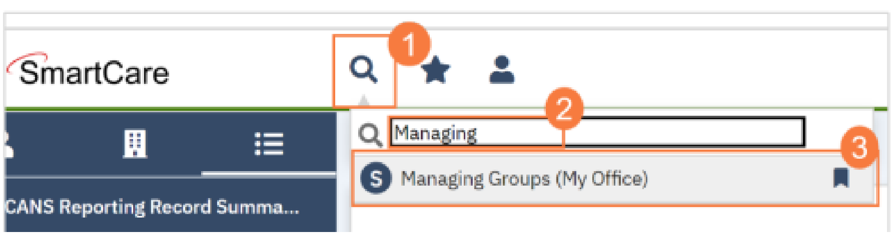


7. Click Save and X to close.

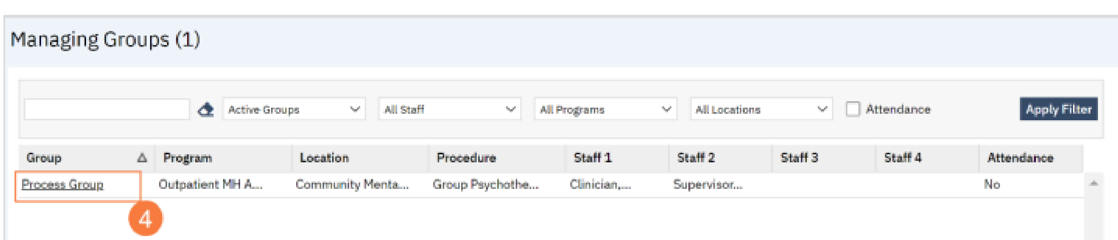


How to Add or Change a Staff Member in a Group

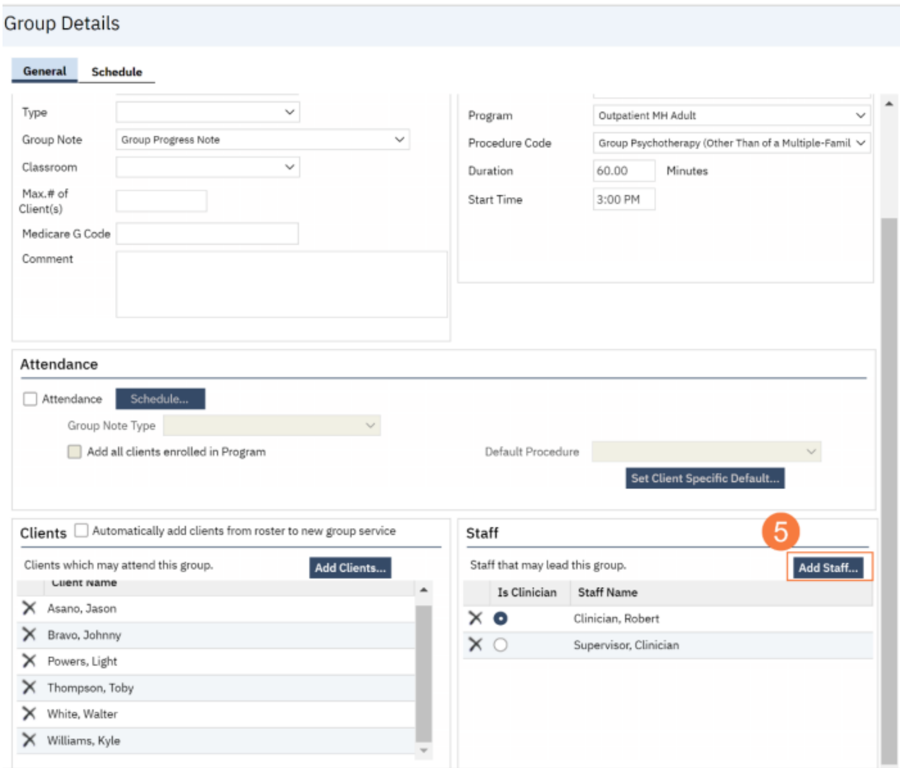
1. Click the Search icon.
2. Type **Managing** into the search bar. Note: you can also type **Group** and get the same result.
3. Click to select **Managing Groups (My Office).**



4. Click to select the Group you will be adding the staff to.



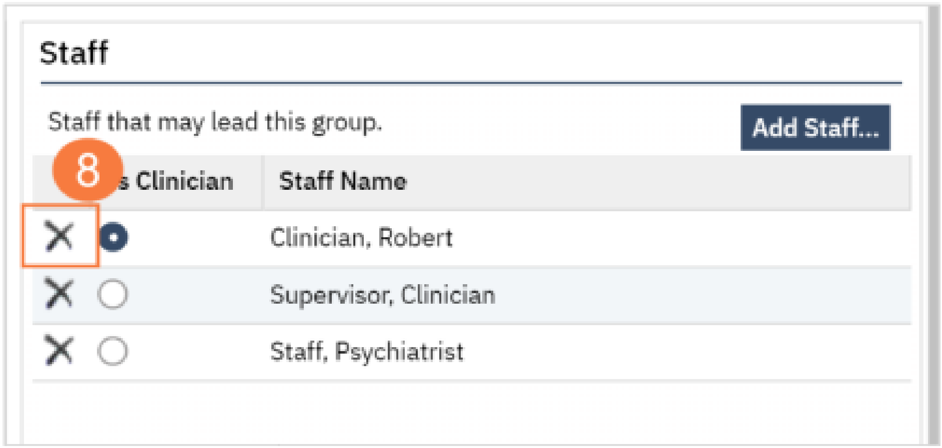
5. Locate the Staff section towards the bottom of the Group Details screen. Click Add Staff.



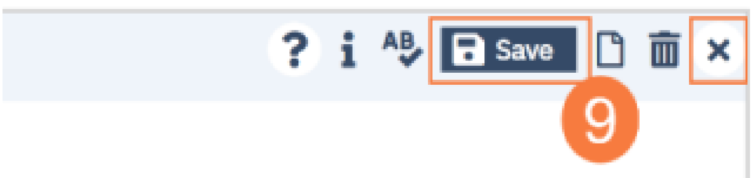
6. Click to select the correct staff member to add.

7. Click OK.

8. And/or, if you need to remove a staff member, click the X to the left of the staff member you want to remove.

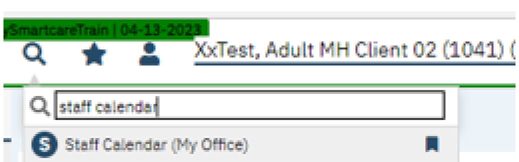


9. Click Save. Click the X to close the screen.

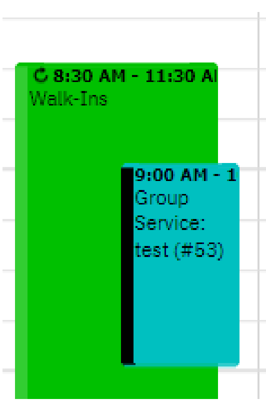


If staff is out sick and someone else will be facilitating group for the day

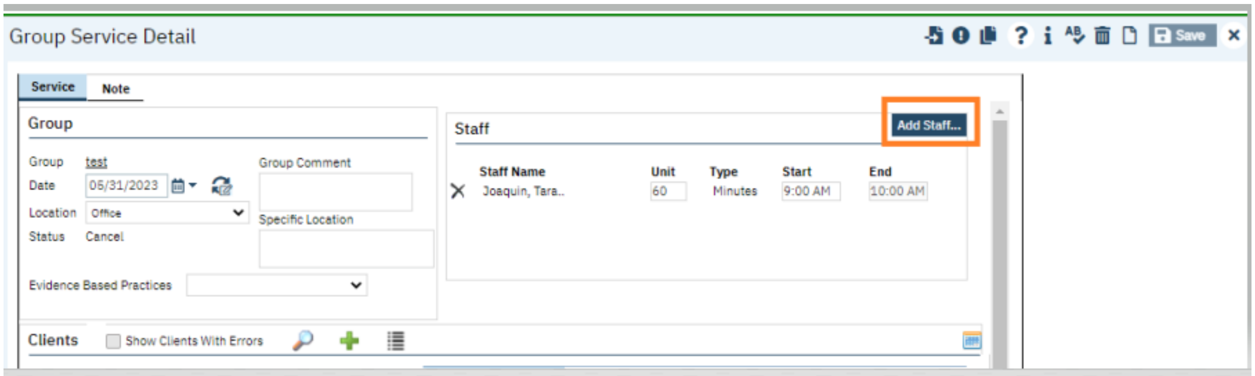
1. Search **Staff Calendar**. Select **Staff Calendar (My Office)**.



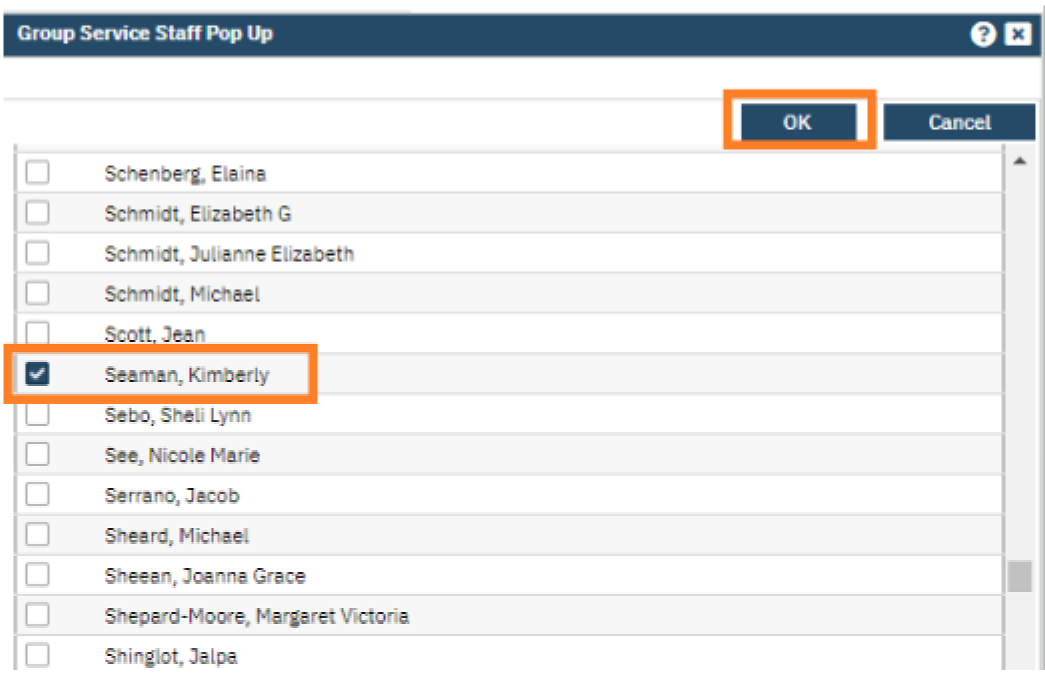
2. Locate the group service and double click to open.



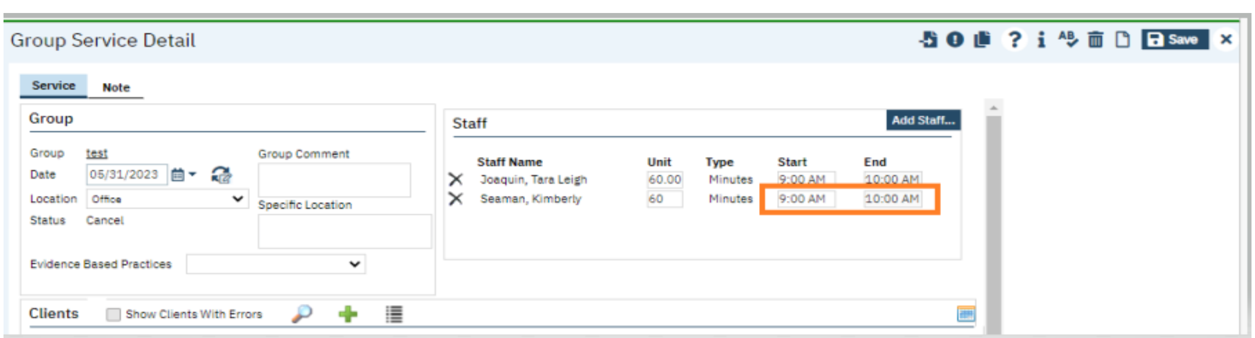
3. Click the Add Staff button.



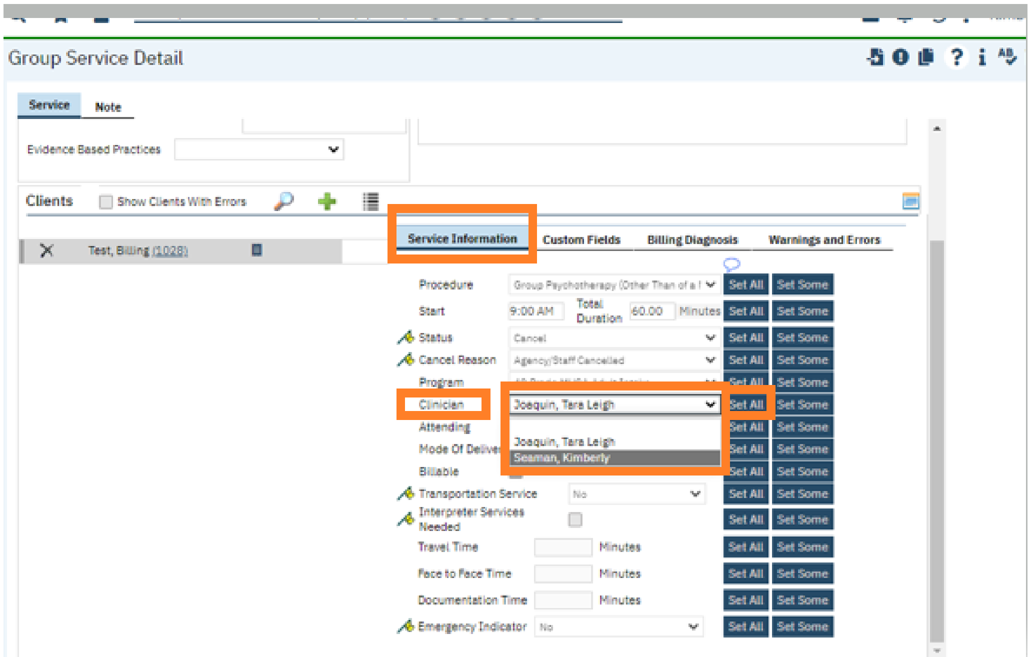
4. Select the staff from the drop-down menu and click OK.



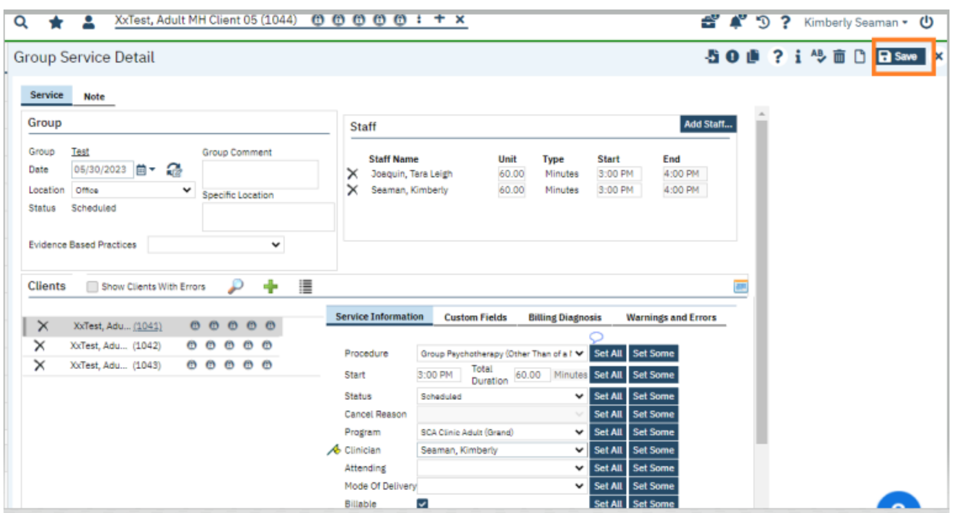
5. Enter in start time for newly added staff.



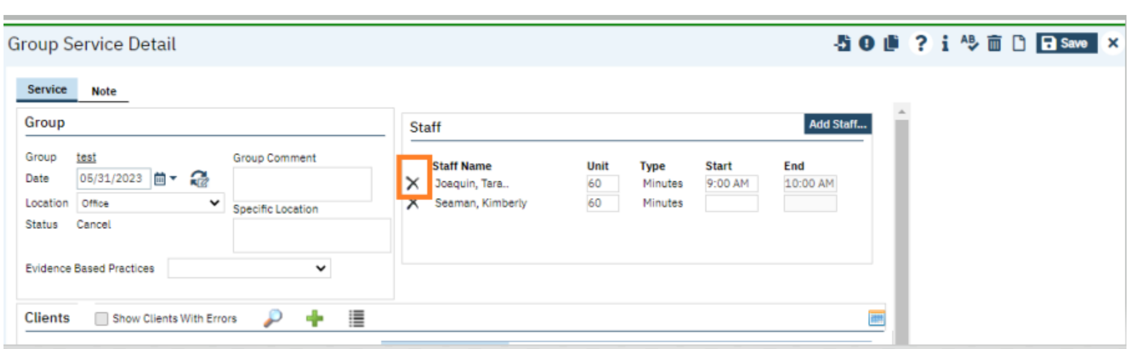
6. In the Service Information tab, change the clinician and click Set All.



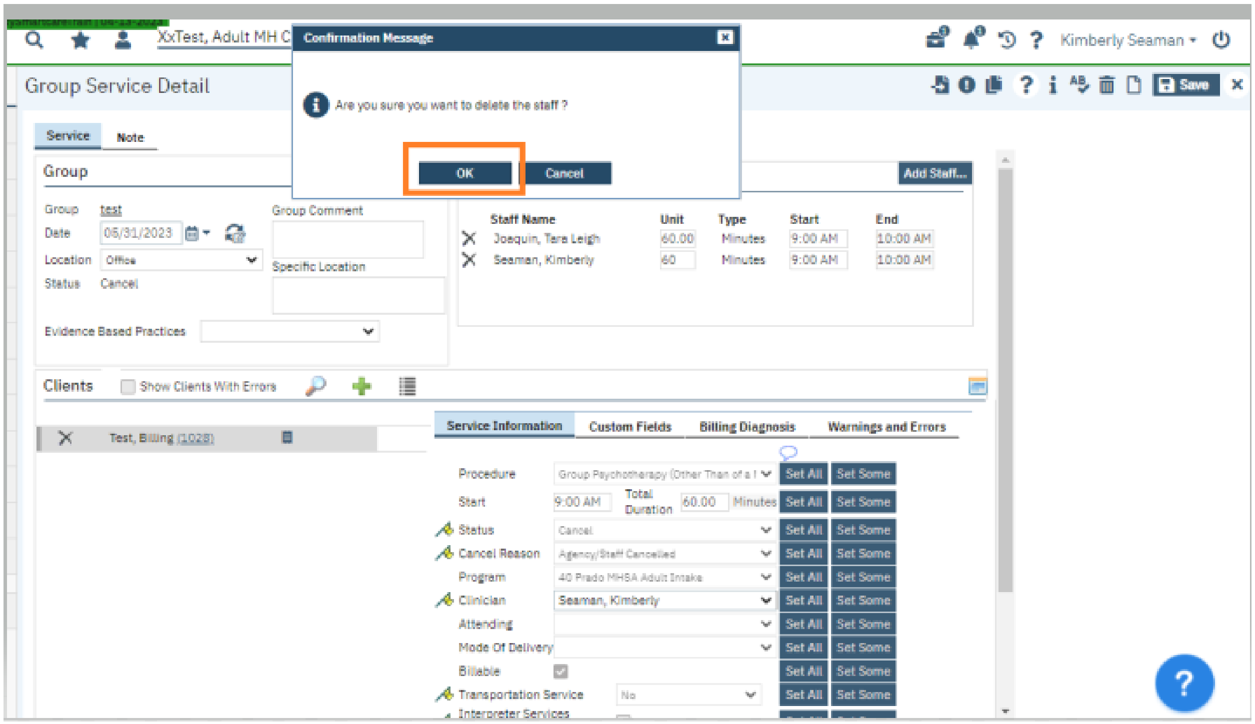
7. Click Save.



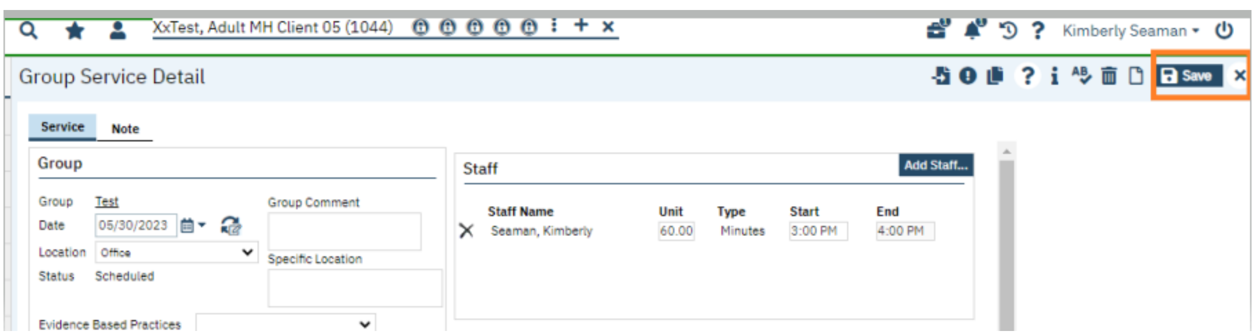
8. Click the X next to the staff you are removing from that day's group.



9. Click OK.

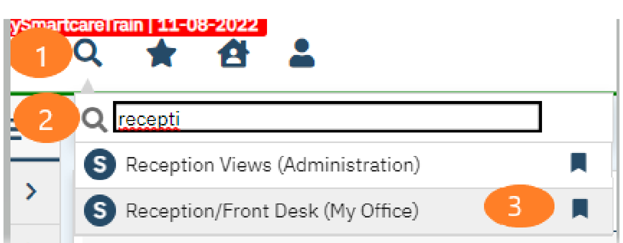


10. Click Save and X to Close.



How to Cancel an Entire Day of Appointments

1. Click the Search icon.
2. Type **Reception** in the search bar.
3. Click to select **Reception-Front Desk (My Office)**



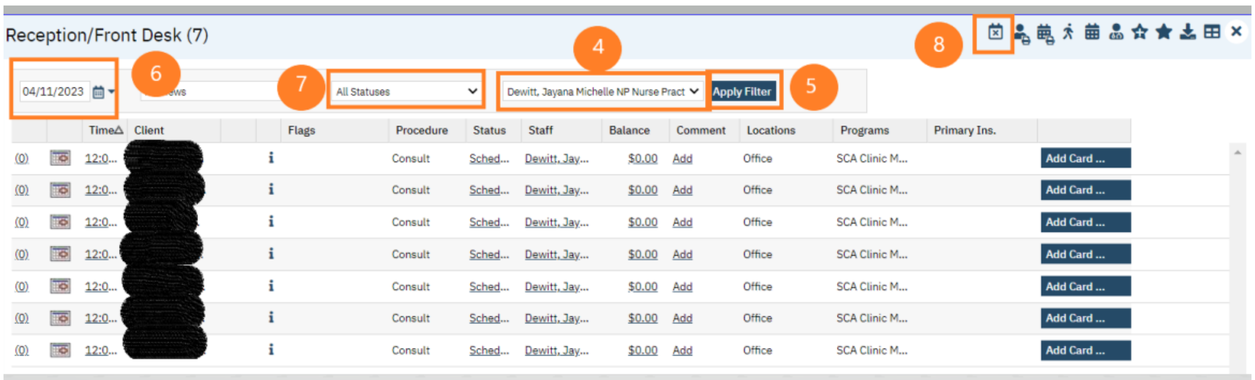
4. Select the staff you want to cancel appointments for.

5. Select Apply Filter.

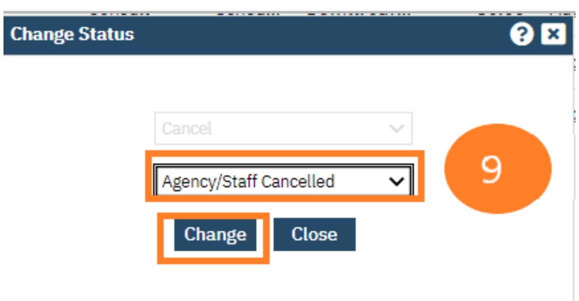
6. Select the date.

7. Select Scheduled in the All-Statuses field. Click Apply Filter.

8. Click the Cancel Appointments icon.

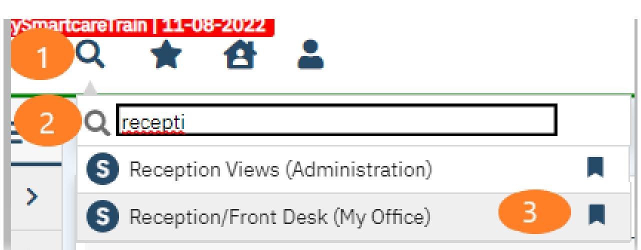


9. A window opens asking for cancellation reason. Select appropriate reason and click Change.



How to Print a Daily Schedule

1. Click the Search icon.
2. Type **Reception** in the search bar.
3. Click to select **Reception-Front Desk (My Office)**



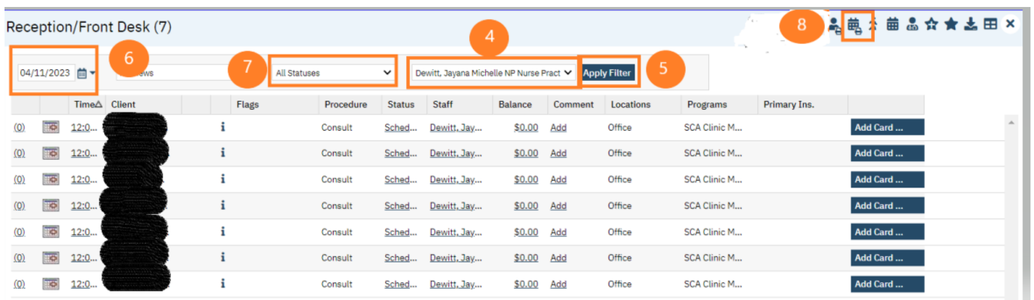
4. Select the staff you want to print the daily schedule for.

5. Select Apply Filter.

6. Select the date.

7. Select Scheduled.

8. Click the Print Daily Schedule icon.



How to Print a Daily Schedule that includes comments, phone #s, insurance info, etc.

Open Search **Reception/Front Desk (my office)**

Chose date, views (defaults to all views), status (defaults to all statuses) & chose Doctor/staff of choice.

Click on the **Export Icon** at top right-hand side of page.

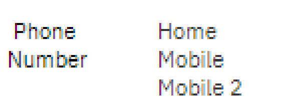
This is now saved in Downloads on your computer.

Downloads window pops up, Click the Open File blue link, click ok to open from trusted source & chose Enable Editing.

It is now an Excel document to adjust, add/delete, etc.

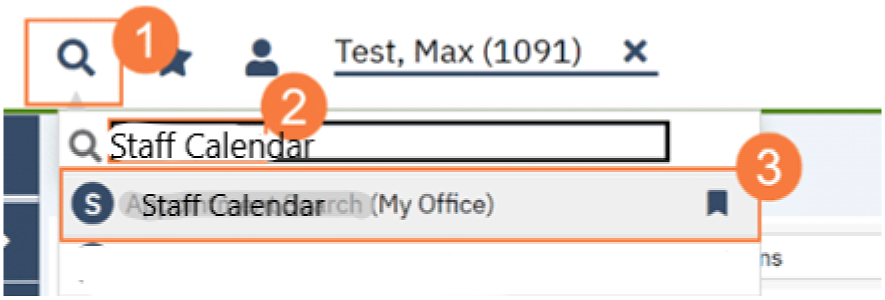
Reminders:

- Save as an "Excel Workbook"
- Phone numbers are in order as follows:



Different Views in Staff Calendar

1. Click the Search icon**.**
2. Type **Staff Calendar** in the search bar.
3. Click to select **Staff Calendar (My Office)**



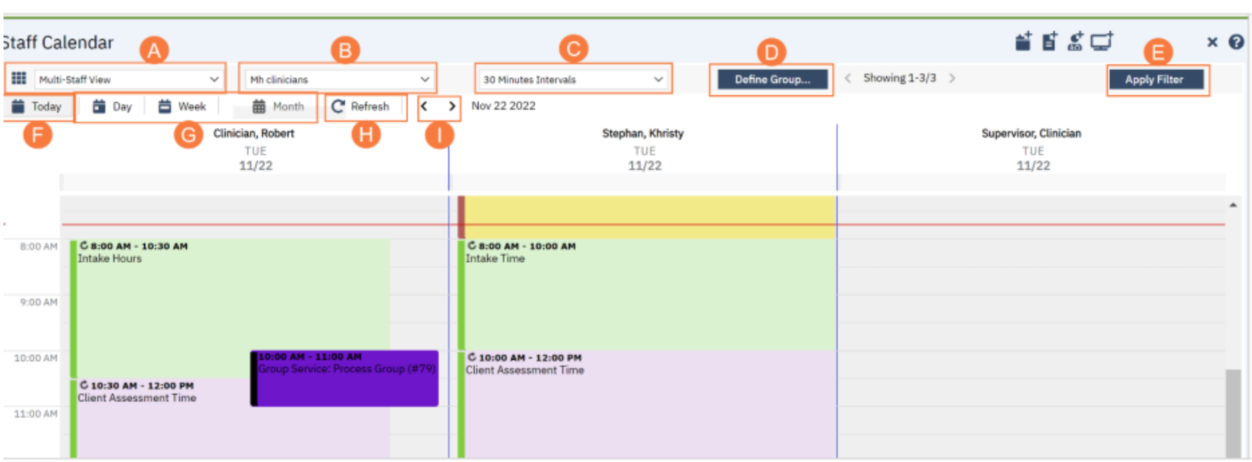
4. Select Single Day View; Select Provider to View; Click Apply Filter (A & E)

   OR

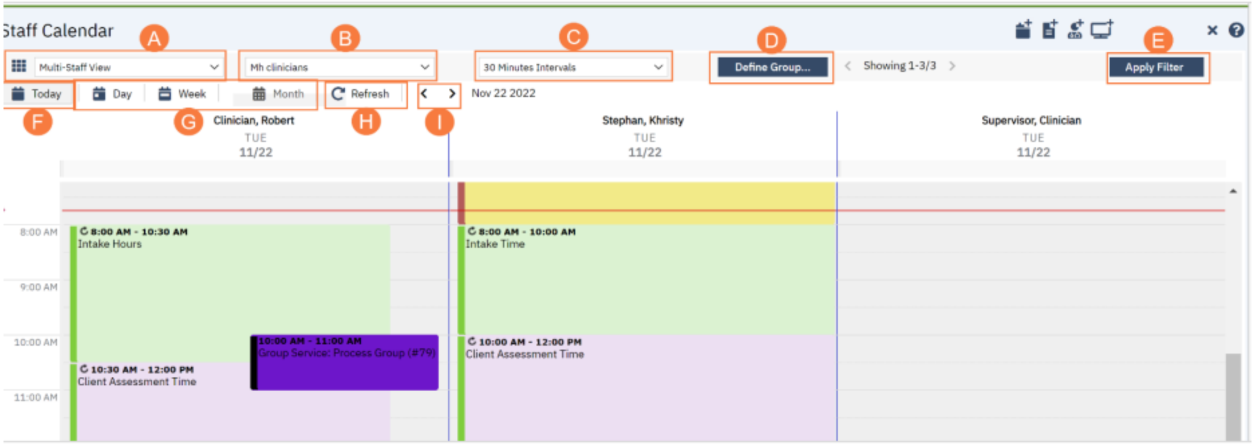
5. Select Multi-Day View**;** Select group you have access to view; Click Apply Filter (A, B & E)

   OR

6. Select Multi-Staff Selected View**;** Select providers; Click OK; Click Apply Filter (A, B & E)



You can view it by day, week, or month. (F & G) Use < > buttons to change date. (I)



A. The View drop-down menu will allow you to switch between calendar views of a single-staff, multiple-staff members based on a pre-defined group, or multiple-staff members that you can select.

B. In the multiple-staff view, this will allow you to choose between pre-defined groups. In single-staff view, this will allow you to switch between staff members.

C. The Intervals drop-down menu will allow you to tell SmartCare the time intervals you want the calendar to display. in. For example, if you select 30 minutes there will be two time slots in each hour on the calendar.

D. The Define Group button will allow you to create your own customized staff group.

E. The Apply Filter button will need to be clicked any time you make changes to A-C (listed above) for it to update the calendar below.

F. The Today button will bring you back to today's date when you have navigated away to a different date.

G. The Day, Week, and Month buttons will allow you to change between daily view, weekly view, or monthly view.

H. The Refresh button will refresh the calendar and show you the most up-to-date information.

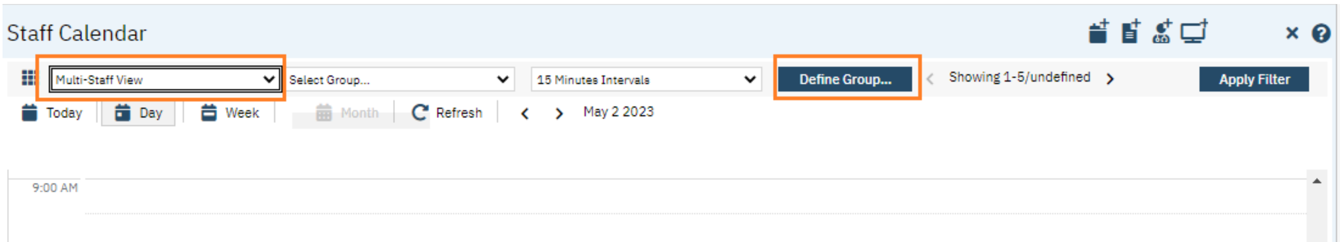
I. The Forward and Back buttons will take you forward a day and back a day.

How to Create a Scheduling Group Template in SmartCare

Search Staff Calendar (My Office).

Select Multi-Staff View.

Select Define Group.



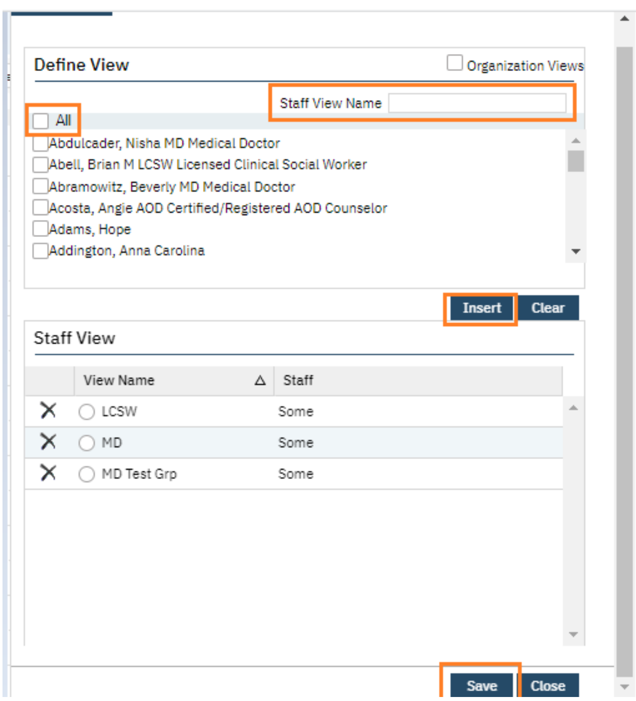
Uncheck All.

Select Staff.

Enter the name of the group in Staff View Name field.

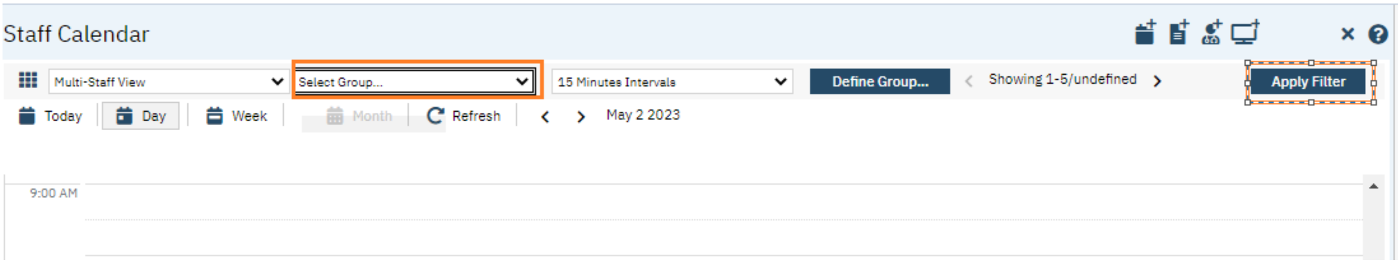
Click Insert.

Scroll down and click Save and Close.

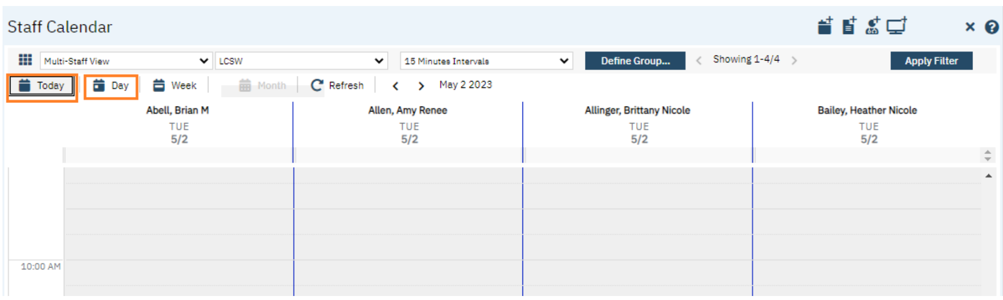


To view the group, click the drop down in Select Group field.

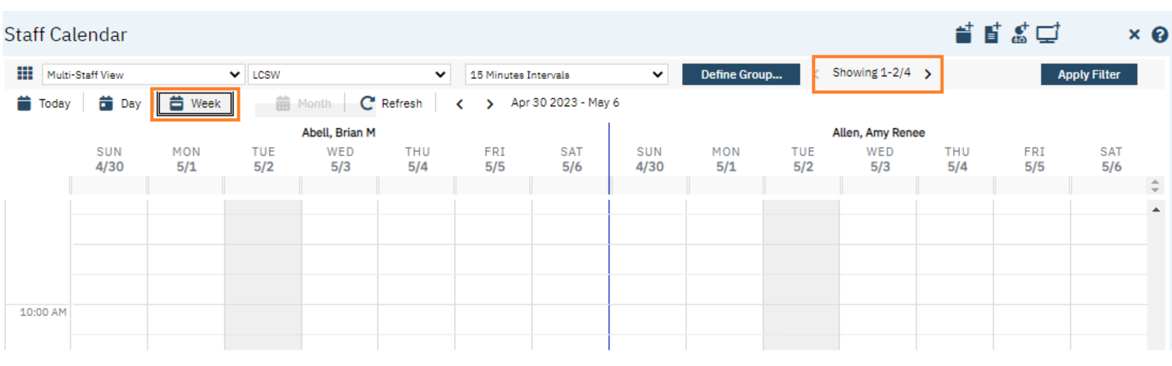
Click Apply Filter.



You can view Today, Day, or Week by clicking the corresponding button.

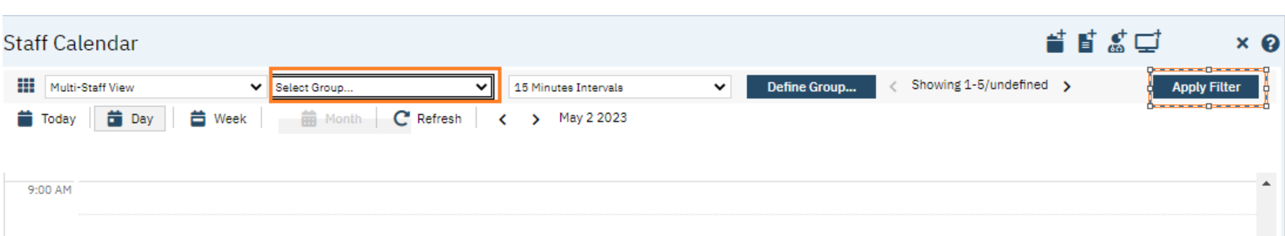


To navigate by week, click the <Showing> button.



To add/remove staff from group, click drop down in Select Group field.

Click Apply Filter.



Click the radial button next to the group name you want to edit.

Select/remove staff.

Click update.

Scroll down, click save and close.