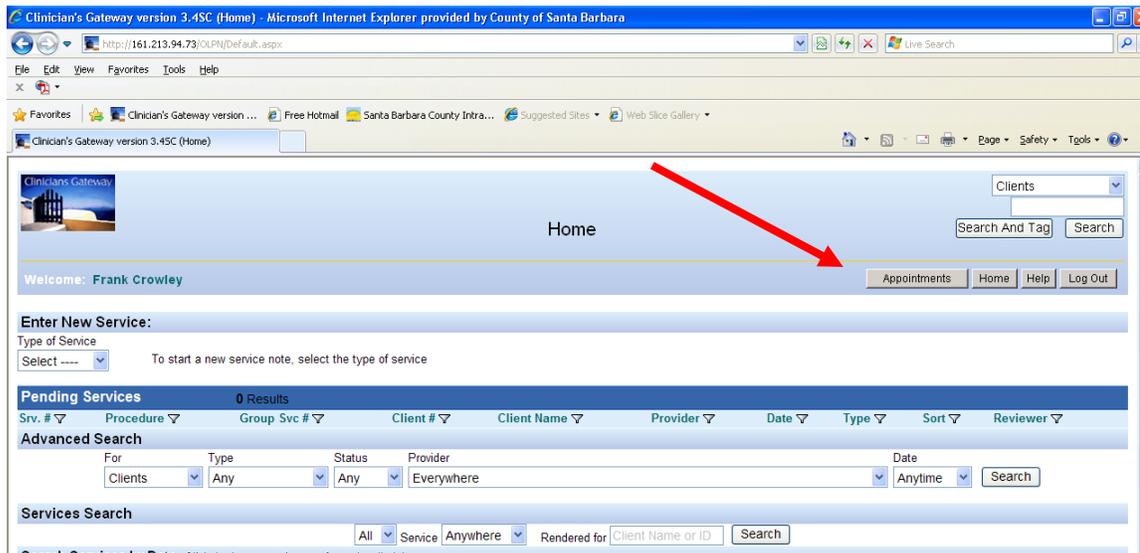


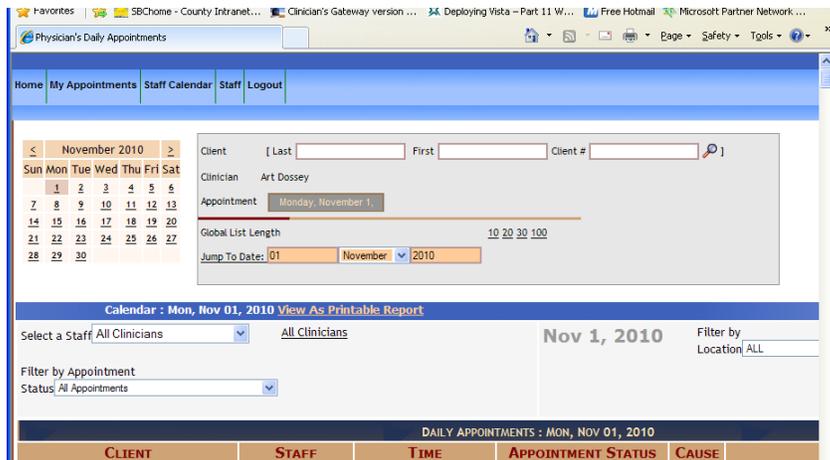
Scheduling/ Calendar Software Training Manual

In order to enter the Scheduling Software, click on **Appointment** button on the home page in Clinician Gateway.



Once you click on the **Appointment** button an additional browser page called the **Physician's Daily Appointments or Daily calendar view** will launch by default; the page should look like the one below; if the **Physician Login Form** page appears instead of this screen, close the window and click on the appointment button again.

Example: Physician's Daily Appointments Page



Example: **Physician Login Form Page** appears in error; close and click **Appointment** button again.

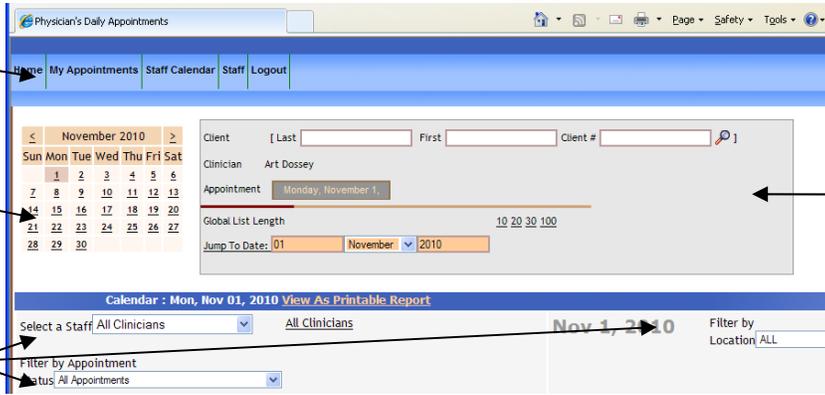


Scheduling/ Calendar Software Training Manual

Drop-Down Menus

Calendar with today's date highlighted

Calendar filters by staff, or by appointment status or by location.



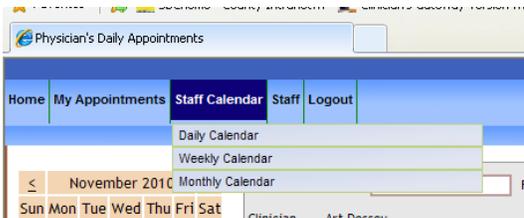
Ignore the gray search area; it will be replaced in the future with a three month widget.

Refer to the drop-down menus.



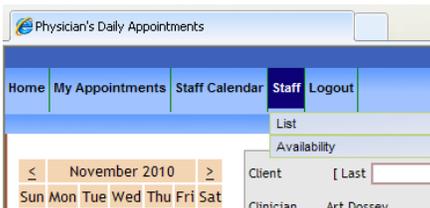
My Appointments:

- **Search** for an existing appointment.
- Create a **new** appointment.
- Create a **recurring** appointment.
- Run **reports**.



Staff Calendar:

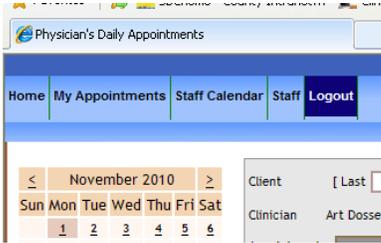
- **Daily Calendar** view.
- **Weekly Calendar** view.
- **Monthly Calendar** view.



Staff:

- Staff **list** is not currently functioning.
- Staff **availability** is also not functioning correctly at this time.

Scheduling/ Calendar Software Training Manual



Logout:

- Ignore the Logout drop-down menu item and button; instead just close the Scheduling/Calendar window by clicking on the red 'X' in the upper right corner of the window.



By default the **Physician's Daily Appointments** or **Daily Calendar View** will appear when you first enter the scheduling/calendar software. In addition, the view is not filtered so all the clinician appointments in all locations and all appointment statuses appear.

Calendar : Tue, Nov 02, 2010 View As Printable Report

Select a Staff: All Clinicians Nov 2, 2010 Filter by Location:

Filter by Appointment Status:

DAILY APPOINTMENTS : TUE, NOV 02, 2010						
CLIENT	STAFF	TIME	APPOINTMENT STATUS	CAUSE	LOCATION	DETAILS
11am, Aquia CFT meeting	[Ms.] Kiera E Berry	11/2/10 7:00 AM 0.25	Created		Lompoc Children's Services - New Heights - TAY	→
, BLOCKED: Prep Time	Colleen Rydjord	11/2/10 7:15 AM 0.25	Created		Calle Real MHS Center - Adult Outpatient	→
, BLOCKED: Check V/S / lab records	Colleen Rydjord	11/2/10 7:30 AM 0.25	Created		Calle Real MHS Center - Adult Outpatient	→
, BLOCKED: Prep time	[Dr.] James Stewart	11/2/10 8:00 AM 1.0	Created		Calle Real MHS Center - Adult Outpatient	→
SUBJ: staffing	Kenneth D Nichols	11/2/10 8:00 AM 1.0	Created		Santa Maria MH Services - Adult Outpatient	→

Scheduling/ Calendar Software Training Manual



To filter for your daily calendar, click the **down-arrow** to the right of the **Select a Staff** field and select your name. Currently the list of clinicians is sorted by first name.

Refer to the page below:

- This clinician does not have any appointments on this date.
- A spreadsheet view of the appointments appears above the hourly view.
- The add column allows you an additional method for creating an appointment
- Another method for creating an appointment is clicking **My Appointments** from drop-down menus and selecting **New** from the list of choices.



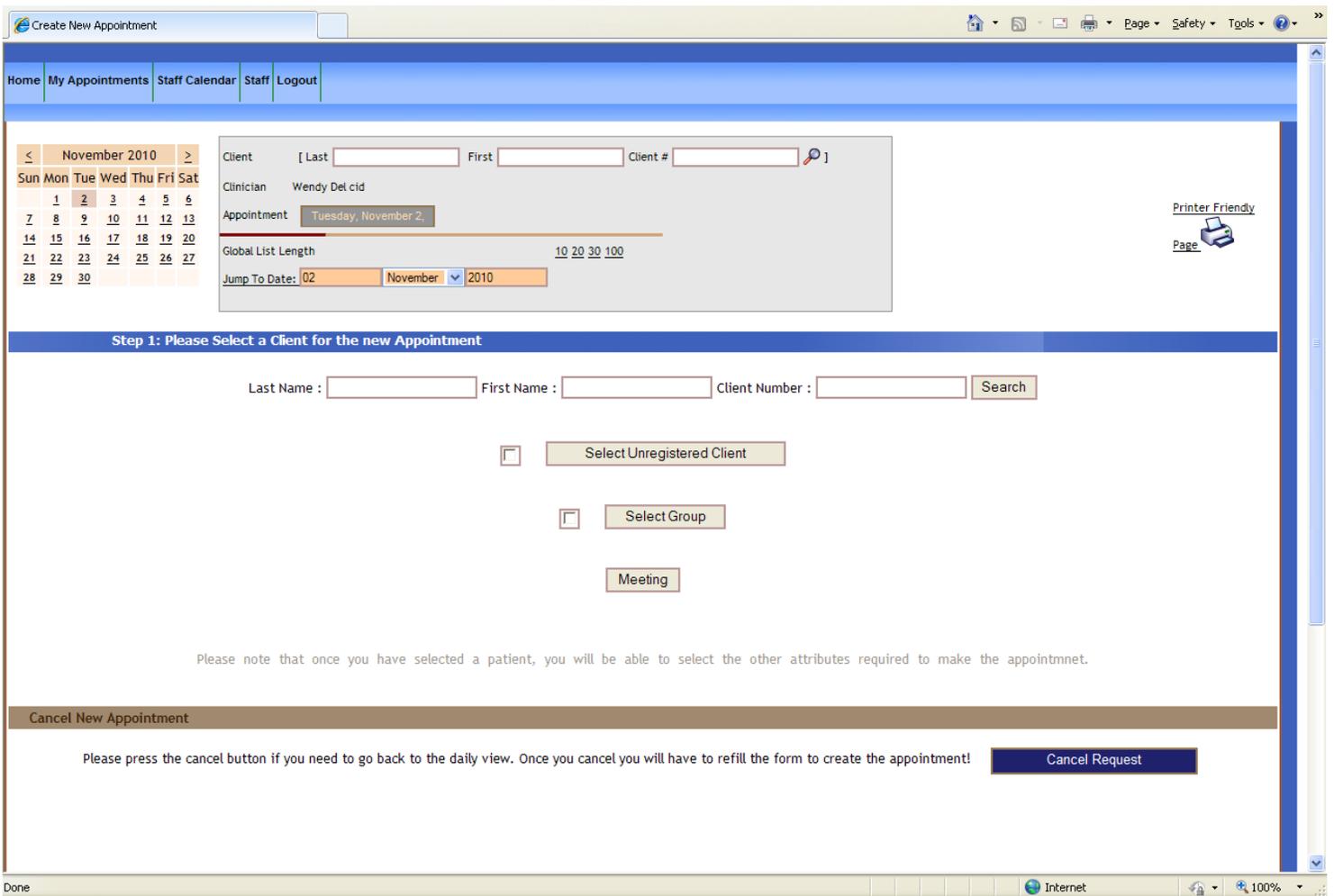
Scheduling/ Calendar Software Training Manual



My Appointments:

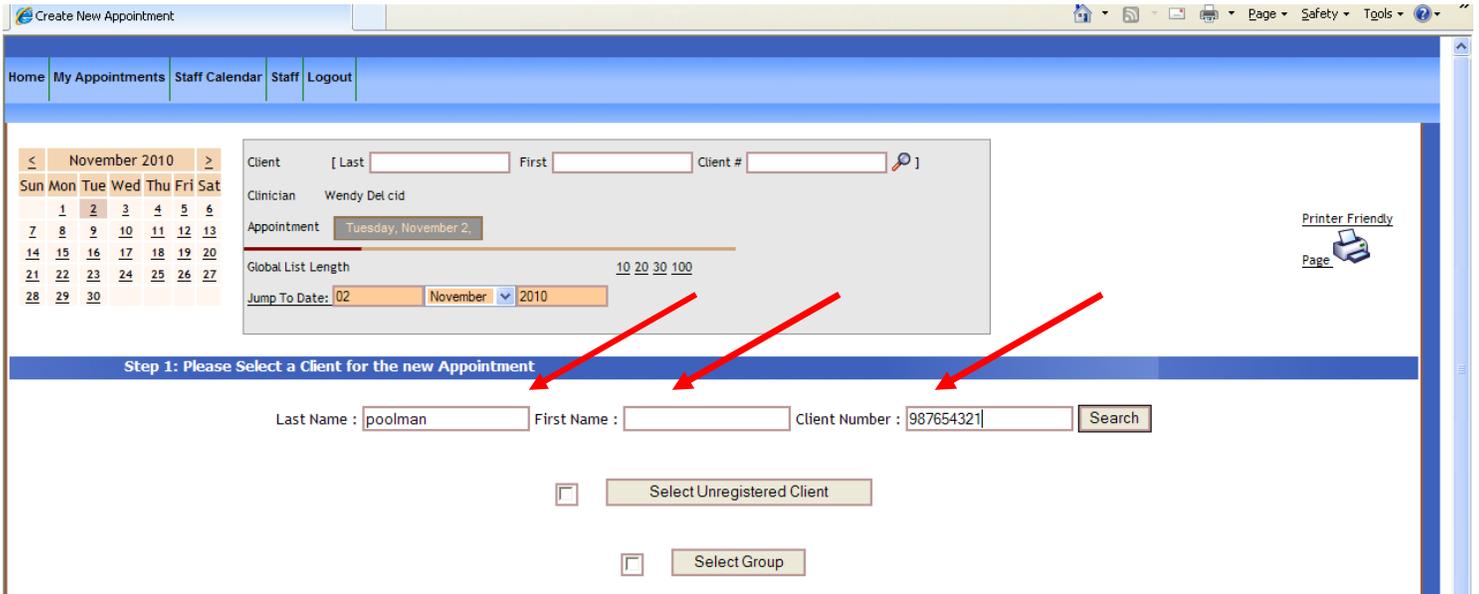
- Click on **New** and the **Create New Appointment** page will appear; refer to the page below.

Step 1: select a client for the new appointment. At this point you have the ability to search for **Registered and Open** clients using their Last Name, First Name and Client Number or some other combination. You can also check and click to enter an appointment for an **Unregistered Client, Group or Meeting**. In this case, I am going to Search for a registered client and make the appointment using the **appointment detail page** for a registered client.



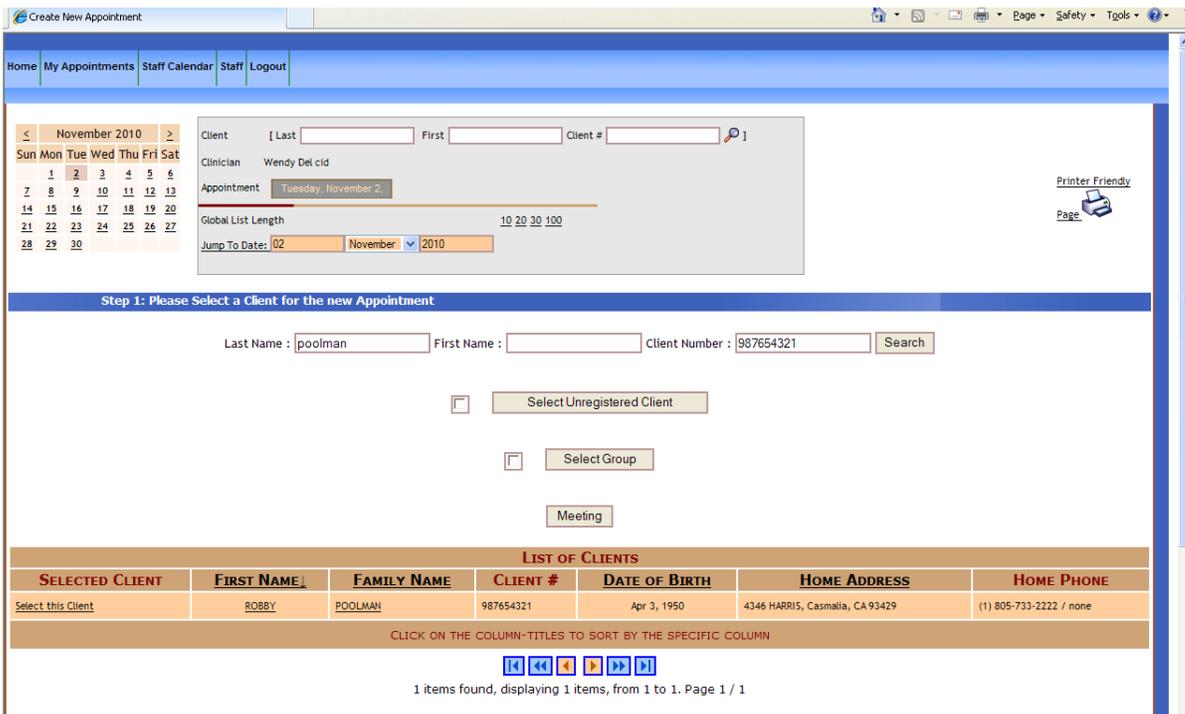
Scheduling/ Calendar Software Training Manual

In this example, I am going to search for a fictitious client by the name of **poolman** and click the **Search** button.
Hint: Ignore the search fields in grey; only use the fields below the blue line.



Hint: When searching for a client in a database, if you have the client's number use it first. If the client has a hard to spell last name or hyphenated name search by the first few letters of the last name instead.

Scroll down to the spreadsheet with **List of Clients**; verify the client #, name or date of birth; then click on the link on the far left, **Select the Client** which will launch the Appointment Entry Form Details page.



Scheduling/ Calendar Software Training Manual

Step 2; fill-in all the required fields, Clinician, Clinic, Date for the appointment, Appointment time, Appointment duration, Procedure, Note or Clinician Gateway Template Type, Location, Flags, New or Returning Patient, and Reason for Appointment. Then click the **Submit** button.

The screenshot shows a web browser window with the URL 'Create New Appointment'. The page has a navigation bar with 'Home', 'My Appointments', 'Staff Calendar', 'Staff', and 'Logout'. Below the navigation bar is a calendar for November 2010. The main content area is titled 'Step 2: Appointment Entry Form Details' and contains the following fields:

- Client:** [Last First Client #]
- Clinician:** Wendy Del cid
- Appointment:** Tuesday, November 2, 2010
- Global List Length:** 10 20 30 100
- Jump To Date:** 02 November 2010

The 'Step 2: Appointment Entry Form Details' section includes:

- Select a Clinician for the Appointment:** Frank Crowley
- Clinic:** Calle Real MHS Center - Adult Outpatient
- Date for the Appointment:** Tuesday, November 2, 2010
- Select the Appointment Time:** 07:00 AM
- Appointment Duration:** 00:15
- Client Name, #:** Robby Poolman, 987654321
- Procedure:** 13, Individual Therapy
- Notes:** 1, Adult
- Location:** Office
- Flag 1, Flag 2, Flag 3:** None Selected
- New Client:**
- Restricted Client:**
- Reason For Appointment:**

Buttons for 'Submit' and 'Reset' are located at the bottom of the form. A 'Cancel New Appointment' button is also present. A message at the bottom states: 'Please press the cancel button if you need to go back to the daily view. Once you cancel you will have to refill the form to create the appointment!' with a 'Cancel Request' button.

Hint: Make sure you select the correct Note type which also sets the proper Template type in Clinician Gateway; this is one of the only fields in Clinician Gateway that can't be changed after the draft note is generated.

Scheduling/ Calendar Software Training Manual

After clicking on the **Submit** button, the appointment detail page appears on the screen with an appointment status of “**Created**”. If the Clinic and Procedure match possible choices for this client, based on the face sheet and current admissions, a draft note will be generated in Clinician Gateway.

Click on **Staff Calendar** from the drop-down menu and select **Daily Calendar** to view this appointment on your daily calendar. Notice the **arrow** which designates the start time in fifteen minute increments. Also the text has the **client’s name** followed by the **clinician’s name** and the **person who created the appointment**. Finally, notice the **blue colored square** which lets you know that the appointment is in **Created status**; no draft note has been created yet.

CLIENT	STAFF	TIME	APPOINTMENT STATUS	CAUSE	LOCATION	DETAILS
Robby Poolman Ph. (11805-732222220000)	Frank Crowley	11/7/10 7:00 AM 0.25	Created	This is a test appt...	Calle Real MHS Center - Adult Outpatient	→

Scheduling/ Calendar Software Training Manual

Click on the *Appointment text* or the *Appointment Time* to reenter the *Appointment Details Form*. If you click on the *Client Name* you will launch the *Patient Workflow* page in error; go to the *Daily Calendar* and click on the *Appointment Time* or *Appointment Text* again.

Calendar : Sun, Nov 07, 2010 [View As Printable Report](#)

Select a Staff: All Clinicians Nov 7, 2010 Filter by Location:

Filter by Appointment Status:

DAILY APPOINTMENTS : SUN, NOV 07, 2010						
CLIENT	STAFF	TIME	APPOINTMENT STATUS	CAUSE	LOCATION	DETAILS
Robby Poolman Ph: (1)805-7332222Xnone	Frank Crowley	11/7/10 7:00 AM 0.25	Created	This is a test appt..	Calle Real MHS Center - Adult Outpatient	→
CLIENT	STAFF	TIME	STATUS	CAUSE	LOCATION	DETAILS

DAILY APPOINTMENTS : SUN, NOV 07, 2010

1 items found, displaying 1 items, from 1 to 1 Page 1 / 1

SCHEDULE OF THE DAY'S APPOINTMENTS		
Time	Appointments	Add
7:00 AM	→ Robby Poolman [Frank Crowley] /fcrowley	+
7:15 AM		+
7:30 AM		+
7:45 AM		+
8:00 AM		+

Example of the Patient Workflow Page.

Select a workflow for the Patient

Patient Workflow for Robby Poolman

- [View Patient Profile](#)
- [Patient Dashboard](#)
- [Edit Patient Profile](#)
- [Create an Appointment](#)
- [View Appointment History](#)
- [View Billing History](#)
- [Create a Message for a Patient](#)
- [Add Patient Insurance](#)
- [Patient Ledger](#)
- [Unabridged View](#)

Scheduling/ Calendar Software Training Manual

At [this](#) point we are going to **change the Appointment Status and generate a draft note**. The clinician or front office staff will be able to **check-in** the client, **cancel** the appointment, **enter** additional comments, or **no show** the appointment. Someone would have to change the Appointment Status in order to generate a draft note. Notice the **blue bar along the top of the appointment details which designated 'Created' Status**.

The screenshot displays the 'Appointment Details' web application. At the top, there is a navigation menu with 'Home', 'My Appointments', 'Staff Calendar', 'Staff', and 'Logout'. A calendar for November 2010 is visible on the left, with the 7th highlighted. The main content area shows appointment details for Robby Poolman, scheduled for Sunday, November 7, 2010, at 7:00 AM, with a status of 'Created'. A blue bar at the top of the details section contains the word 'Created'. Below this, the 'Appointment Basic Information' section lists client details, appointment time, and status. The 'Description' section provides procedure and location information. The 'Appointment Status Information' section includes checkboxes for 'Check In', 'Confirm Appointment', and 'Cancel', along with a 'Cancelled By' dropdown. The 'Appointment Temporal Information' section shows creation and update times. At the bottom, another blue bar contains the word 'Created', and a row of buttons includes 'Check In', 'Confirm', 'Cancel', 'Edit', 'No Show', and 'Copy'.

Appointment Details [Edit] [Cancel] [Check In] [Inactivate Appointment] [Copy]

Created

Appointment Basic Information

Client	Robby Poolman
Client Number	987654321
Clinician	Frank Crowley
Appointment Status	Created
Appointment Type	
Clinic	Calle Real MHS Center - Adult Outpatient
Appointment Time	Sunday, November 7, 2010 7:00 AM
Appointment End Time	Sunday, November 7, 2010 7:15 AM
Check-In Time	
Appointment Request Cause	This is a test appt. to create user documentation. Poolman is not a valid client.

Description

Procedure	13, Individual Therapy
Notes	1, Adult
Location	Office
Color Code	None Selected
Remidner Flag 1	
Reminder Flag 2	
Reminder Flag 3	

Appointment Status Information

Check In	<input type="checkbox"/>
Confirm Appointment	<input type="checkbox"/>
Cancel	<input type="checkbox"/> { <input type="checkbox"/> Cancelled & Rescheduled <input checked="" type="checkbox"/> Cancelled }
Cancelled By	<input type="checkbox"/> Staff <input type="checkbox"/> Client
Comments	
New Comments	<input type="text"/>

[Add New Comments](#)

Appointment Temporal Information

Creation Time	Tuesday, November 2, 2010 2:55 PM
Last Modified By	fcrowley
Last Update Time	Tuesday, November 2, 2010 2:55 PM

Created

Check In Confirm Cancel Edit

No Show Copy

Scheduling/ Calendar Software Training Manual

In this example, I am going to **Check-In** the client and change the **Appointment Status from Created to Check-In**, which will **generate a draft note in Clinician Gateway**. In the Appointment Status Information section, **check the box next to Check In** and click the blue **Check In** button at the bottom of the Appointment Details Form.

Appointment Details [Edit Cancel Check In Inactivate Appointment Copy]

Created

Appointment Basic Information

Client	Robby Poolman
Client Number	987654321
Clinician	Frank Crowley
Appointment Status	Created
Appointment Type	
Clinic	Calle Real MHS Center - Adult Outpatient
Appointment Time	Sunday, November 7, 2010 7:00 AM
Appointment End Time	Sunday, November 7, 2010 7:15 AM
Check-In Time	
Appointment Request Cause	This is a test appt. to create user documentation. Poolman is not a valid client.
Description	
Procedure	13, Individual Therapy
Notes	1, Adult
Location	Office
Color Code	None Selected
Remidner Flag 1	
Reminder Flag 2	
Reminder Flag 3	

Appointment Status Information

Check In	<input checked="" type="checkbox"/>
Confirm Appointment	<input type="checkbox"/>
Cancel	<input type="checkbox"/> { <input type="checkbox"/> Cancelled & Rescheduled <input type="checkbox"/> Cancelled }
Cancelled By	<input type="checkbox"/> Staff <input type="checkbox"/> Client
Comments	[11/03/2010;fcrowley: This is not a real clinician Gateway note; strictly for training documentation.]
New Comments	<input type="text"/> Add New Comments

Appointment Temporal Information

Creation Time	Tuesday, November 2, 2010 2:55 PM
Last Modified By	fcrowley
Last Update Time	Wednesday, November 3, 2010 1:20 PM

Created

Check In Confirm Cancel Edit

No Show Copy

Scheduling/ Calendar Software Training Manual

Notice the **green bar along the top of the appointment details** which designated **‘Checked In’ Status**. Also the appointment status field has changed to **‘Checked In’** and a draft note will be generated in Clinician Gateway.

Appointment Details - Microsoft Internet Explorer provided by County of Santa Barbara

Appointment Details [Inactivate Appointment Copy]

Checked In

Appointment Basic Information

Client	Robby Poolman
Client Number	987654321
Clinician	Frank Crowley
Appointment Status	Checked In
Appointment Type	
Appointment ISRN	1824569
Clinic	Calle Real MHS Center - Adult Outpatient
Appointment Time	Sunday, November 7, 2010 7:00 AM
Appointment End Time	Sunday, November 7, 2010 7:15 AM
Check-In Time	Wednesday, November 3, 2010 1:48 PM
Appointment Request Cause	This is a test appt. to create user documentation. Poolman is not a valid client.
Description	
Procedure	13, Individual Therapy
Notes	1, Adult
Location	Office
Color Code	None Selected
Reminder Flag 1	
Reminder Flag 2	
Reminder Flag 3	
Comments	[Appointment Checked-In on 11/03/2010 by fcrowley] [11/03/2010;fcrowley: This is not a real clinician Gateway note; strictly for training documentation.]
New Comments	<input type="text"/> Add New Comments

Appointment Temporal Information

Creation Time	Wednesday, November 3, 2010 1:48 PM
Last Modified By	fcrowley
Last Update Time	Wednesday, November 3, 2010 1:20 PM

Switch to the Daily Calendar and notice Appointment Status and the green square next to the appointment.

Physician's Daily Appointments

DAILY APPOINTMENTS : SUN, NOV 07, 2010

CLIENT	STAFF	TIME	APPOINTMENT STATUS	CAUSE	LOCATION	DETAILS
Robby Poolman Ph: (1)805-733222Xnone	Frank Crowley	11/7/10 7:00 AM 0.25	Checked In	This is a test appt..	Calle Real MHS Center - Adult Outpatient	→

SCHEDULE OF THE DAY'S APPOINTMENTS

Time	Appointments	Add
07:00 AM	→ Robby Poolman [Frank Crowley] /fcrowley	+
07:15 AM		+
07:30 AM		+
07:45 AM		+

Scheduling/ Calendar Software Training Manual

In this example, I am going to **Cancel the Appointment** and change the **Appointment Status from Created to Cancelled**, which will **generate a draft note in Clinician Gateway**. In the Appointment Status Information section, **check the box next to Cancel plus the radio button next to Cancelled or Cancelled & Rescheduled** and **select one of the radio boxes next to Cancelled By; either in the box next to Staff or Client**. Then click the blue **Cancelled button** at the bottom of the Appointment Details Form.

The screenshot shows the 'Appointment Details' form with the following sections and content:

- Appointment Basic Information:**
 - Client: Robby Poolman
 - Client Number: 987654321
 - Clinician: Frank Crowley
 - Appointment Status: Created
 - Appointment Type: [blank]
 - Clinic: Calle Real MHS Center - Adult Outpatient
 - Appointment Time: Sunday, November 7, 2010 7:00 AM
 - Appointment End Time: Sunday, November 7, 2010 7:15 AM
 - Check-In Time: [blank]
 - Appointment Request Cause: This is a test appt. to create user documentation. Poolman is not a valid client.
 - Description: [blank]
 - Procedure: 13, Individual Therapy
 - Notes: 1, Adult
 - Location: Office
 - Color Code: None Selected
 - Remidner Flag 1: [blank]
 - Reminder Flag 2: [blank]
 - Reminder Flag 3: [blank]
- Appointment Status Information:**
 - Check In:
 - Confirm Appointment:
 - Cancel: { Cancelled & Rescheduled Cancelled }
 - Cancelled By: Staff Client
 - Comments: [11/03/2010;fcrowley: This is not a real clinician Gateway note; strictly for training documentation.]
 - New Comments: [text area]
- Appointment Temporal Information:**
 - Creation Time: Tuesday, November 2, 2010 2:55 PM
 - Last Modified By: fcrowley
 - Last Update Time: Wednesday, November 3, 2010 1:20 PM

At the bottom of the form, there is a blue bar with the text 'Created' and a row of buttons: Check In, Confirm, Cancel, Edit, No Show, and Copy. A red arrow points to the 'Cancel' button.

Scheduling/ Calendar Software Training Manual

Notice the appointment status has changed to Cancelled and a draft note will be generated.

Appointment Details

Appointment Basic Information

Client	Robby Poolman
Client Number	987654321
Clinician	Frank Crowley
Appointment Status	Cancelled
Appointment Type	
Rescheduled	false
Cancelled By	Client
Clinic	Calle Real MHS Center - Adult Outpatient
Appointment Time	Wednesday, November 3, 2010 7:30 AM
Appointment End Time	Wednesday, November 3, 2010 7:45 AM
Check-In Time	
Appointment Request Cause	THis is for Training Documentation Only; fake client
Description	Post Factum appointment created by fcrowley on Wed, Nov 3, '10.
Procedure	13, Individual Therapy
Notes	1, Adult
Location	Office
Color Code	None Selected
Remidner Flag 1	
Reminder Flag 2	
Reminder Flag 3	
Comments	[Appointment Cancelled on 11/03/2010 by fcrowley] [11/03/2010;fcrowley: Training documentation only; fake client and appointment]
New Comments	<input type="text"/>

Appointment Temporal Information

Creation Time	Wednesday, November 3, 2010 2:18 PM
Last Modified By	fcrowley
Last Update Time	Wednesday, November 3, 2010 2:18 PM

Switch to the Daily Calendar and notice Appointment Status and the red 'X' next to the appointment.

Physician's Daily Appointments

CLIENT	STAFF	TIME	APPOINTMENT STATUS	CAUSE	LOCATION	DETAILS
Robby Poolman Ph: (1)805-7332222Xnone	Frank Crowley	11/14/10 7:00 AM 0.25	Cancelled		Calle Real MHS Center - Case Management	→
CLIENT	STAFF	TIME	STATUS	CAUSE	LOCATION	DETAILS

DAILY APPOINTMENTS - SUN, NOV 14, 2010

SCHEDULE OF THE DAY'S APPOINTMENTS

Time	Appointments	Add
07:00 AM	→ Robby Poolman [Frank Crowley] /fcrowley	+
07:15 AM		+

Scheduling/ Calendar Software Training Manual

In this example, I am going to **No Show the Appointment** and change the **Appointment Status from Created to No Show**, which will **generate a draft note in Clinician Gateway**. In the Appointment Status Information section, click the blue **No Show** button at the bottom of the Appointment Details Form.

The screenshot displays the 'Appointment Details' form with the following sections:

- Appointment Basic Information:** Client (Robby Poolman), Client Number (987654321), Clinician (Frank Crowley), Appointment Status (Created), Appointment Type, Clinic (Calle Real MHS Center - Case Management), Appointment Time (Wednesday, November 3, 2010 8:00 AM), Appointment End Time (Wednesday, November 3, 2010 8:15 AM), Check-In Time, Appointment Request Cause (Test only), Description (Post Factum appointment created by fcrowley on Wed, Nov 3, '10), Procedure (13, Individual Therapy), Notes (1, Adult), Location (Office), Color Code (None Selected), and three Reminder Flags.
- Appointment Status Information:** Check In, Confirm Appointment, Cancel (with options for Canceled & Rescheduled and Canceled), Cancelled By (Staff or Client), Comments ([11/03/2010;fcrowley: Test appointment for training documentation of fake client.]), and a text area for New Comments with an 'Add New Comments' link.
- Appointment Temporal Information:** Creation Time (Wednesday, November 3, 2010 2:22 PM), Last Modified By (fcrowley), and Last Update Time (Wednesday, November 3, 2010 2:39 PM).

At the bottom of the form, there is a blue bar with the text 'Created'. Below this bar are two rows of buttons: the first row contains 'Check In', 'Confirm', 'Cancel', and 'Edit'; the second row contains 'No Show' and 'Copy'. A red arrow points to the 'No Show' button.

Scheduling/ Calendar Software Training Manual

The No Show Appointment form with launch; click the **No Show** button at the bottom of the form.

The screenshot shows a web browser window titled "No Show Appointment". The browser's address bar is empty, and the page has a blue header with navigation links: Home, My Appointments, Staff Calendar, Staff, and Logout. On the left side, there is a calendar for November 2010, with the 3rd highlighted. The main content area is titled "No Show Appointment" and contains the following information:

- Client: Robby Poolman
- Physician: Frank Crowley
- Referring Staff: [Empty]
- Appointment Status: Created
- Appointment Time: Wednesday, November 3, 2010 4:00 PM
- Appointment Reason: Test only.
- Location: Calle Real MHS Center - Case Management
- Appointment Progress Report: Post Factum appointment created by fcrowley on Wed, Nov 3, '10.

At the bottom of the form area, there is a prominent "No Show" button. The browser's status bar at the bottom shows "Done" and "Internet".

Scheduling/ Calendar Software Training Manual

Notice the red bar along the top of the appointment details which designated No Show Status. Also the appointment status has changed to No Show status and a draft note will be generated.

The screenshot shows the 'Appointment Details' window. At the top, a red bar spans the width of the window with the text 'No Show'. Below this, the 'Appointment Basic Information' section is visible. A red arrow points to the 'Appointment Status' field, which is set to 'No Show'. Other fields include Client (Robby Poolman), Client Number (987654321), Clinician (Frank Crowley), Appointment Type, Clinic (Calle Real MHS Center - Case Management), Appointment Time (Wednesday, November 3, 2010 8:00 AM), Appointment End Time (Wednesday, November 3, 2010 8:15 AM), Check-In Time, Appointment Request Cause (Test only), Description (Post Factum appointment created by fcrowley on Wed, Nov 3, '10), Procedure (13, Individual Therapy), Notes (1, Adult), Location (Office), Color Code (None Selected), and three Reminder Flag fields.

Switch to the Daily Calendar and notice Appointment Status and the red square next to the appointment. Remember a red 'X' is cancelled and a red square is no show.

The screenshot shows two windows. The top window is 'DAILY APPOINTMENTS : WED, NOV 03, 2010'. It contains a table with columns: CLIENT, STAFF, TIME, APPOINTMENT STATUS, CAUSE, LOCATION, and DETAILS. Two rows are visible. The first row shows a cancelled appointment at 7:30 AM. The second row shows a 'No Show' appointment at 8:00 AM, with a red arrow pointing to the 'No Show' status. The bottom window is 'Physician's Daily Appointments' showing a 'SCHEDULE OF THE DAY'S APPOINTMENTS'. It displays a grid of time slots from 7:00 AM to 8:30 AM. Two appointments are listed for 7:30 AM and 8:00 AM, both for Robby Poolman with Frank Crowley. A red 'X' is next to the 7:30 AM appointment, and a red square is next to the 8:00 AM appointment, with a red arrow pointing to it.

CLIENT	STAFF	TIME	APPOINTMENT STATUS	CAUSE	LOCATION	DETAILS
Robby Poolman Ph: (1)805-7332222Xnone	Frank Crowley	11/3/10 7:30 AM 0.25	Cancelled	This is for Trainin..	Calle Real MHS Center - Adult Outpatient	→
Robby Poolman Ph: (1)805-7332222Xnone	Frank Crowley	11/3/10 8:00 AM 0.25	No Show	Test only.	Calle Real MHS Center - Case Management	→

Scheduling/ Calendar Software Training Manual

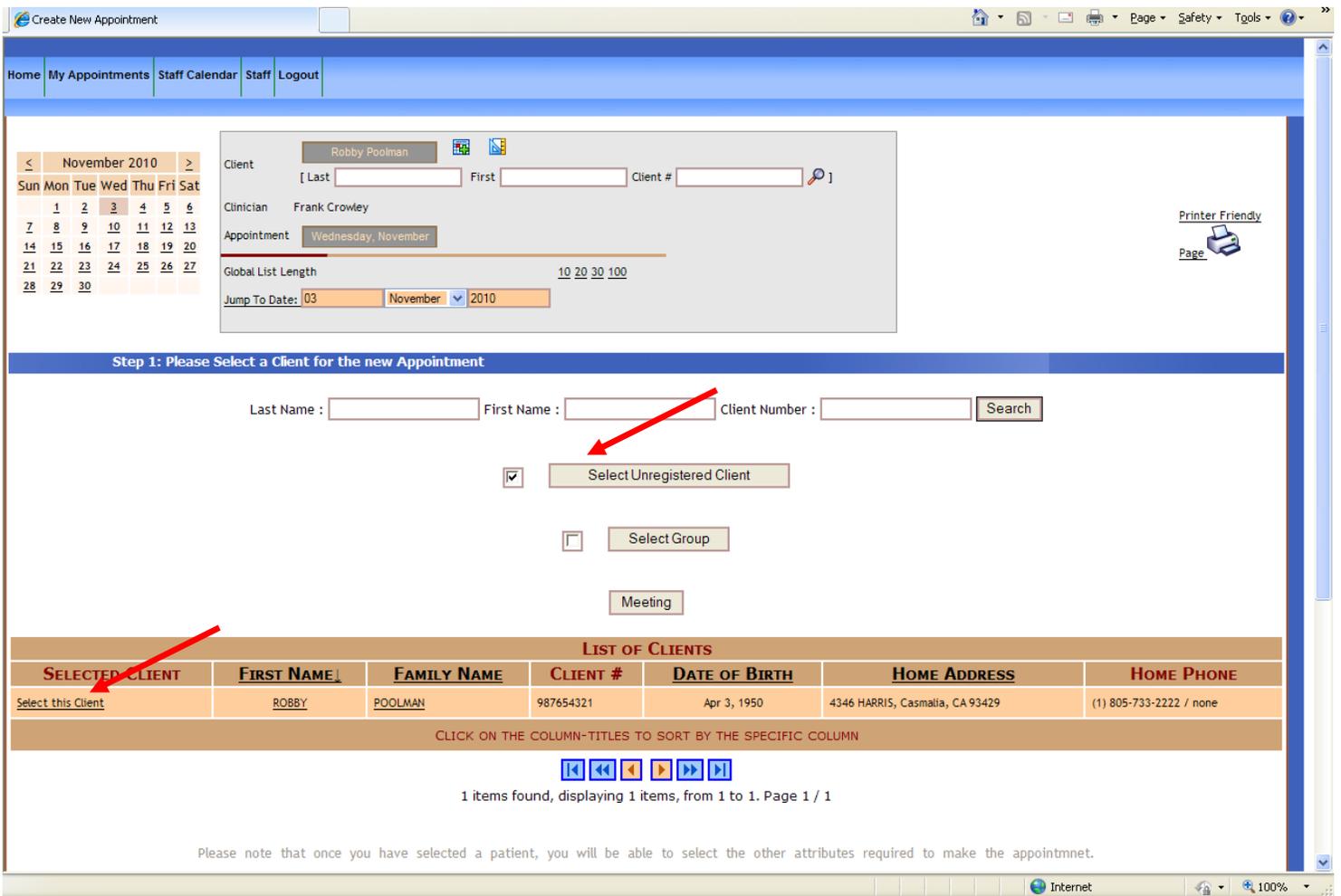
Now I will create a New appointment for an Unregistered Client; this could be used by the CARES staff to show appointments in the scheduling software for unregistered clients.



My Appointments:

- Click on **New** and the **Create New Appointment** page will appear; refer to the page below.

Step 1; select a client for the new appointment. At this point you check and click to enter an appointment for an **Unregistered Client**. Click on the link **Select this Client**. This will cause the Appointment Details page to launch.



Scheduling/ Calendar Software Training Manual

Step 2; fill-in all the required fields, Clinician, Clinic, Date for the appointment, Appointment time, Appointment duration, Procedure, Note or Clinician Gateway Template Type, Location, Flags, New or Returning Patient, and Reason for Appointment. Notice the Client Name in red is titled Unregistered Client and the three boxes for first last and middle names below that; fill-in the additional fields and then click the **Submit** button.

Client: Robby Poolman
[Last First Client #]
Clinician: Frank Crowley
Appointment: Wednesday, November
Global List Length: 10 20 30 100
Jump To Date: 03 November 2010

Step 2: Appointment Entry Form Details

Select a Clinician for the Appointment: Frank Crowley
Clinic: Calle Real MHS Center - Case Management
Date for the Appointment: [Calendar]
Select the Appointment Time: 07:00 AM
Appointment Duration: 00:15
Client Name, #: **Unregistered Client, 20943**
Name:

Procedure: 13, Individual Therapy
Notes: 1, Adult
Location: Office
Flag 1: None Selected
Flag 2: None Selected
Flag 3: None Selected
New Client:
Restricted Client:
Reason For Appointment:

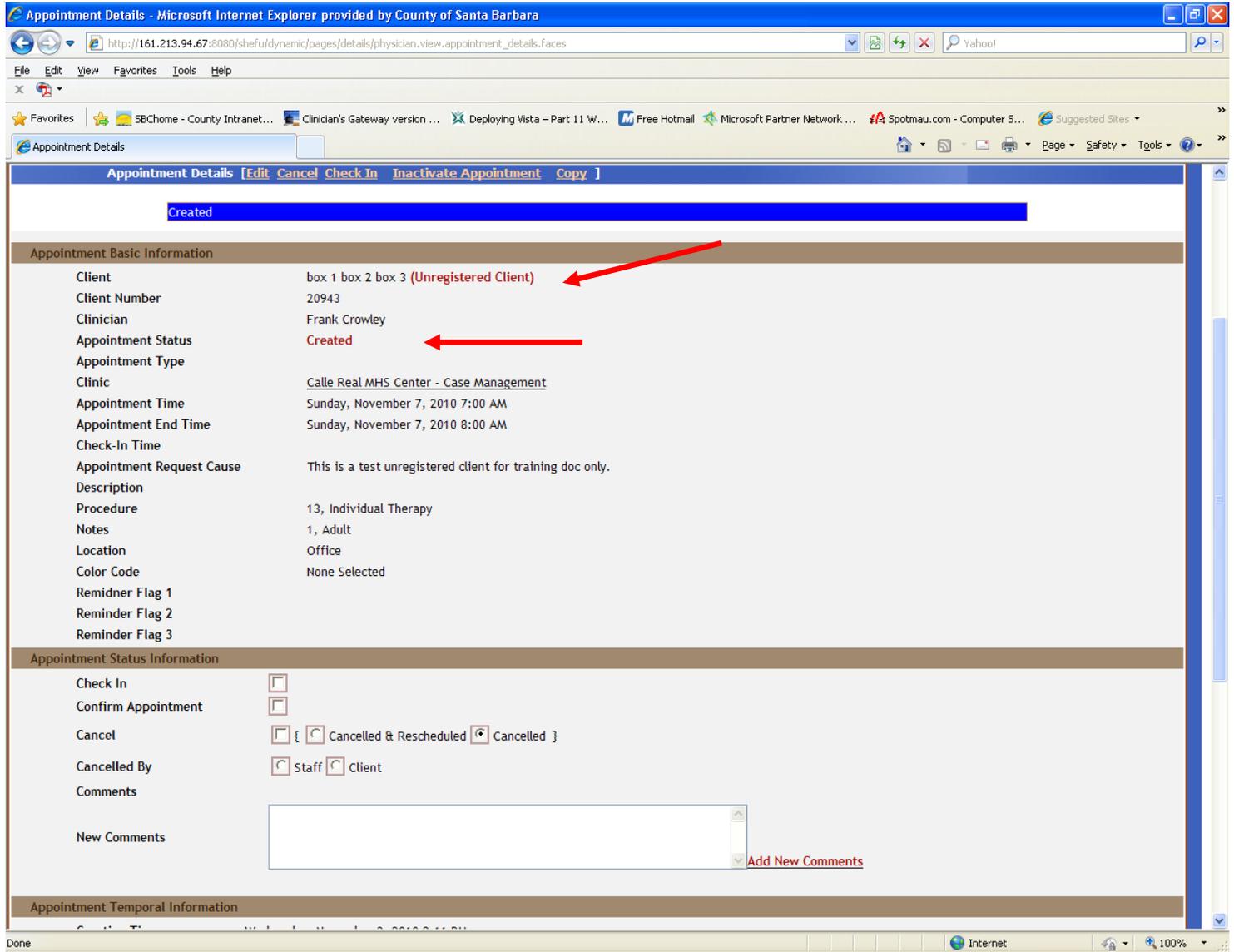
Submit Reset

Cancel New Appointment

Please press the cancel button if you need to go back to the daily view. Once you cancel you will have to refill the form to create the appointment! Cancel Request

Scheduling/ Calendar Software Training Manual

After clicking on the **Submit** button, the appointment detail page appears on the screen with an appointment status of “**Created**”. Because that is an Unregistered Client even if you change the appointment status to Checked In, Cancelled or No Show, a **draft note will not be generated in Clinician Gateway**.



Scheduling/ Calendar Software Training Manual

Click on **Staff Calendar** from the drop-down menu and select **Daily Calendar** to view this appointment on your daily calendar. Notice the **arrow** which designates the start time in fifteen minute increments. Also the text has the **client's name** followed by the **clinician's name** and the **person who created the appointment**. Finally, notice the **blue colored square** which lets you know that the appointment is in **Created status**; no draft note has been created yet.

Physician's Daily Appointments - Microsoft Internet Explorer provided by County of Santa Barbara

http://161.213.94.67:8080/shefu/dynamic/pages/physician.appointment.daily.faces

File Edit View Favorites Tools Help

Physician's Daily Appointments

DAILY APPOINTMENTS : SUN, NOV 07, 2010

CLIENT	STAFF	TIME	APPOINTMENT STATUS	CAUSE	LOCATION	DETAILS
Robby Poolman Ph: (1)805-7332222Xnone	Frank Crowley	11/7/10 7:00 AM 0.25	Checked In	This is a test appt..	Calle Real MHS Center - Adut Outpatient	→
box 3, box 1	Frank Crowley	11/7/10 7:00 AM 1.0	Created	This is a test unre..	Calle Real MHS Center - Case Management	→
CLIENT	STAFF	TIME	STATUS	CAUSE	LOCATION	DETAILS

DAILY APPOINTMENTS : SUN, NOV 07, 2010

2 items found, displaying 2 items, from 1 to 2. Page 1 / 1

SCHEDULE OF THE DAY'S APPOINTMENTS

Time	Appointments	Add
07:00 AM	→ Robby Poolman [Frank Crowley] /fcrowley	±
07:00 AM	→ box 1 box 3 {Frank Crowley} /fcrowley	±
07:15 AM	→box 1 box 3 {Frank Crowley} /fcrowley	±
07:30 AM	→box 1 box 3 {Frank Crowley} /fcrowley	±
07:45 AM	→box 1 box 3 {Frank Crowley} /fcrowley	±
08:00 AM		+
08:15 AM		+

Scheduling/ Calendar Software Training Manual

Here is a snapshot of Clinician Gateway. These are draft notes that were generated by changing the status from 'Created' to Cancelled, No Show or Checked In. The clinician would then click on the Update button, Edit the notes and finalize the notes.

The screenshot shows the Clinician's Gateway version 3.45C (Home) interface. The page title is "Home". A navigation bar includes "Appointments", "Home", "Help", and "Log Out". A "Welcome: Frank Crowley" message is displayed. Below this is the "Enter New Service:" section with a "Type of Service" dropdown menu. The main content area is titled "Pending Services" and shows "4 Results". A table lists the services with columns for Srv. #, Procedure, Group Svc #, Client #, Client Name, Provider, Date, Type, Sort, Reviewer, and an Update... button. Three red arrows point to the "Group Svc #", "Type", and "Update..." columns.

Srv. #	Procedure	Group Svc #	Client #	Client Name	Provider	Date	Type	Sort	Reviewer	Update...
1824605	Consumer Cancelled		987654321	POOLMAN RUBBERTOE	Calle Real Mental Health Services Cen...	11/3/2010	Adult	<input type="radio"/> Draft		Update...
1824642	Consumer No Show		987654321	POOLMAN RUBBERTOE	Calle Real Mental Health Services Cen...	11/3/2010	Adult	<input type="radio"/> Draft		Update...
1824569	Individual Therapy		987654321	POOLMAN RUBBERTOE	Calle Real Mental Health Services Cen...	11/7/2010	Adult	<input type="radio"/> Draft		Update...
1824615	Consumer Cancelled		987654321	POOLMAN RUBBERTOE	Calle Real Mental Health Services Cen...	11/14/2010	Adult	<input type="radio"/> Draft		Update...