SCHEDULER TRAINING GUIDE

Sacramento County Avatar NX Training and Support

Purpose of this Training Guide:

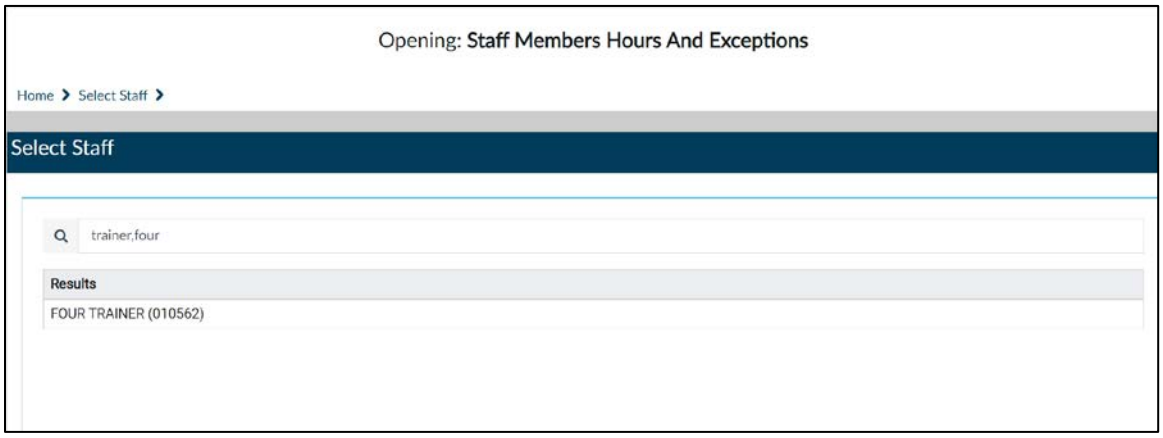
Users must attend Avatar Scheduler Training before gaining access to the Scheduling Calendar. This guide is designed to be an additional tool for Avatar Scheduler users. The Training Guide may change as Avatar NX trainings are updated. If you have any additional questions please contact Avatar Support at 916-876-5806 or Avatar@Saccounty.net.

Staff Members Hours and Exceptions:

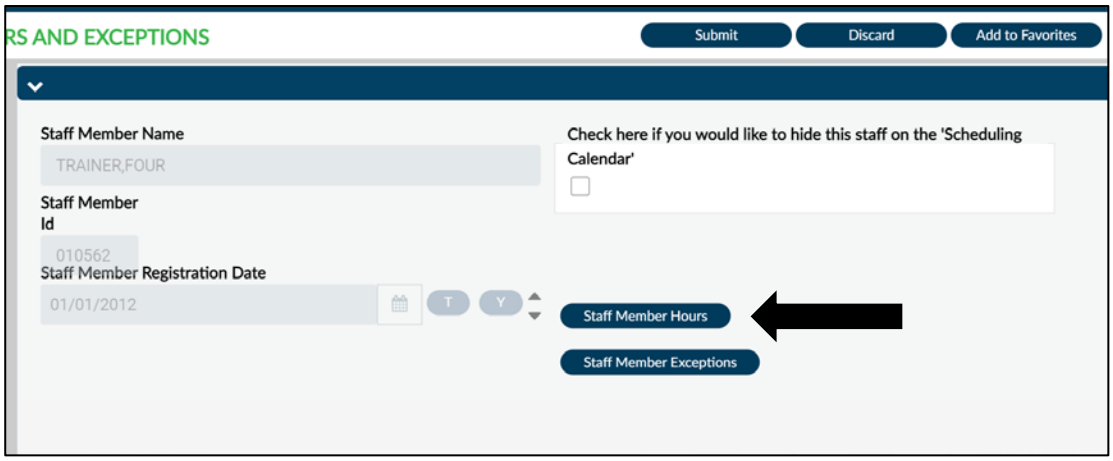
Before a clinician is able to have appointments scheduled on the Scheduling Calendar, their hours and exceptions will need to be added to the system. Below are definitions of staff member's hours and exceptions:

- **Staff Members Hours:** This is the staff member's base schedule. Staff members scheduled hours must fall into the sites hours of operation. For example if the sites hours are 8am-5pm, a staff members schedule cannot be set to begin at 7am. If your sites hours need to be updated please send in a Site Registration request form to Avatar@saccounty.net. This form can be found on our website under the Training tab.
- **Staff Members Exceptions:** This is any time within the staff member's base schedule when they will not be available. Exceptions can be in the form of Individual or Recurring. If the Exception is a holiday or a day that everyone at your agency will have off, you can indicate that in the Site Registration form rather than entering the Exception for each individual practitioner.
    - **Individual Exceptions:** An Individual Exception is a one-time occurrence. It can be set for a period of time or for an entire day(s). Some examples of an Individual Exception would be the clinician goes on vacation and their schedule needs to be blocked off. The clinician has a meeting scheduled and needs that time blocked off.
    - **Recurring Exceptions:** A Recurring Exception is something that will be ongoing. It will most likely be a set period of time. Some examples of a Recurring Exception would be if the clinician has a standing meeting (could be daily, weekly, or monthly) and needs that time blocked off on a recurring basis. If the clinician takes lunch at a set time every day and wants that time blocked off.

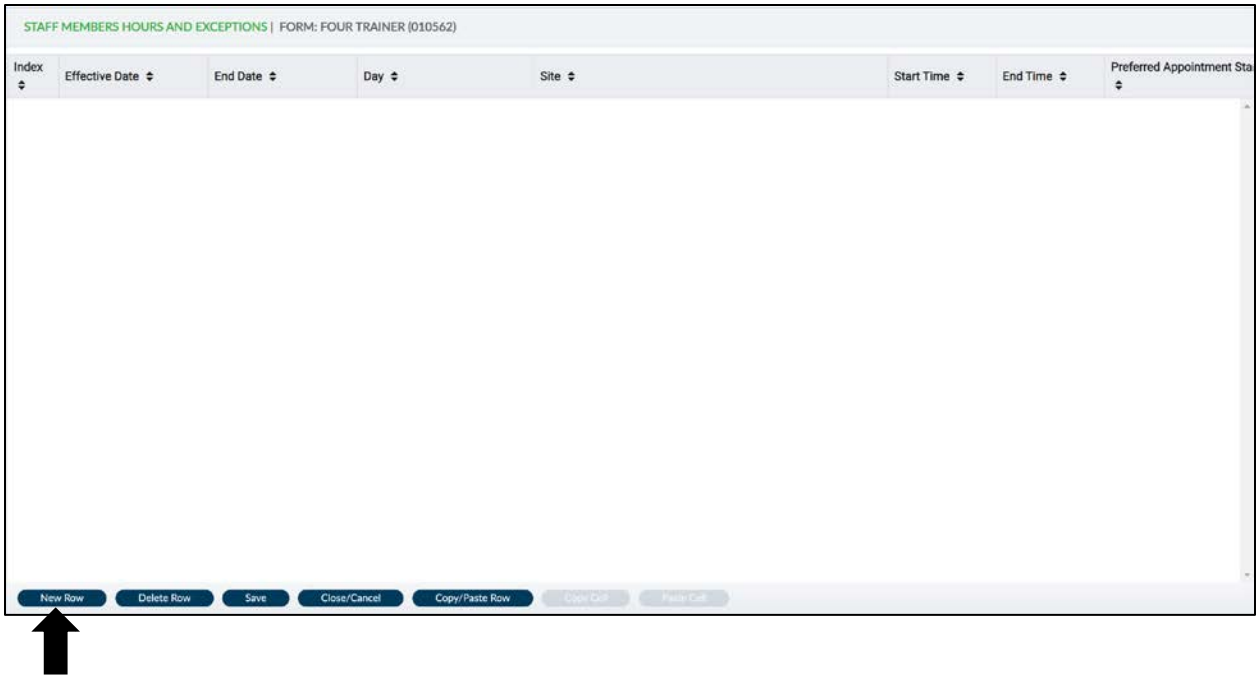
Open the “Staff Members Hours and Exceptions” form, the system will prompt you to select a staff member. You can enter in the staff member’s last name or their staff ID number. Please note that staff members will have had to complete their staff registration with QM before they can be selected. Double click on the name of the staff member that you are working on.



When you open the form, the information on the left-hand side is view only. The options on the right-hand side are how you set up the schedule. You will want to start by setting up the clinician’s base schedule. Click on the “Staff Members Hours” button to open that section of the form.



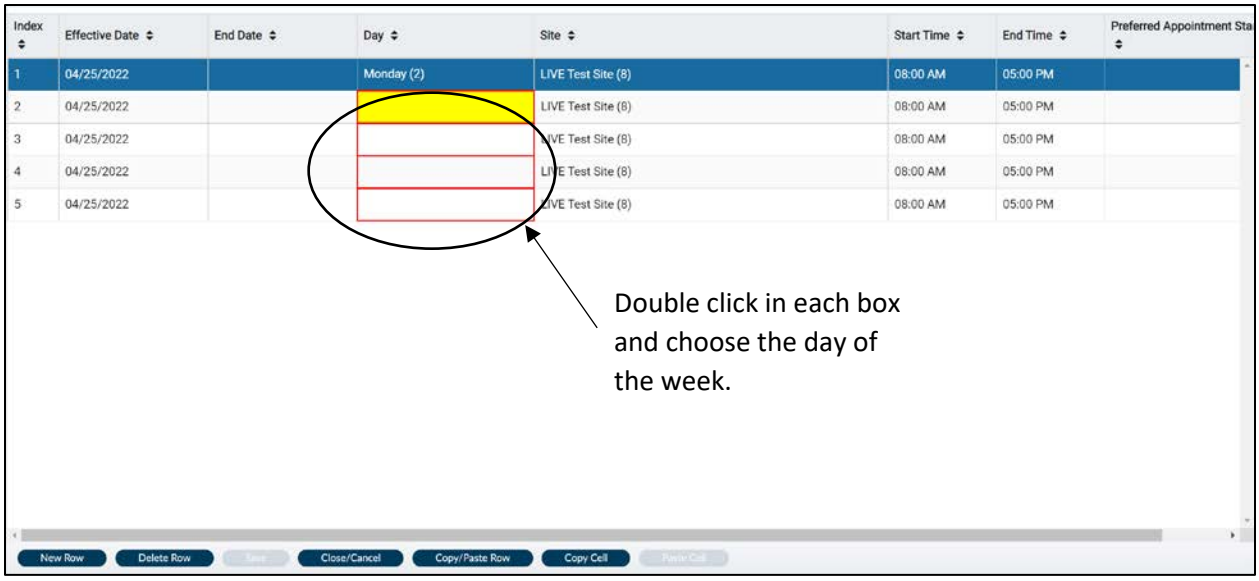
This will bring you to a multi-iteration table. Click on the New Row button to begin entering data.



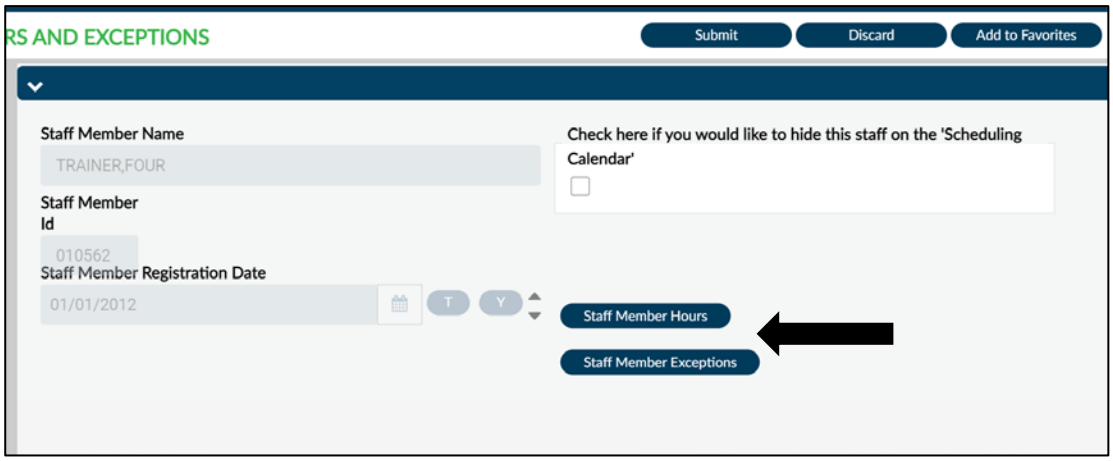
Fill out the sections that are outlined in red.

1. Effective Date- The date the schedule goes into effect. This can be future dated.
2. End Date- Should be entered once the clinician has left the agency or will no longer be on the Scheduling Calendar.
3. Day- Double click in the cell to see the days of the week. Select their first workday.
4. Site-Double click to see the list of sites. Choose the site you are creating your schedule for. You can create a schedule for multiple sites if the clinician will be working at various locations under your agency.
5. Start Time- Enter the start time for the clinician's schedule. Use military time or the following format 00:00 AM/PM.
6. End Time- Enter the end time for the clinician's schedule. Use military time or the following format 00:00 AM/PM.
7. Preferred Appointment Start Time- Double click to see preference scheduling times (on the hour or on the half hour). Choosing a preference in this field will not prohibit you from scheduling during non-preferred times. You will have to come into this form to see the clinician's indicated preference. This field is not required.

Repeat this process for each day the clinician is working. If their work site and their hours are all the same you can Copy/Paste your first row and then update the days of the week



Once the schedule is complete, click on the “Save” button to go back to the previous screen. Your work will not be saved until you have clicked on the “Submit” button on the first screen. If the staff member has any exceptions that need to be entered click on the “Staff Member Exceptions” button.



Like the “Staff Members Hours” page, the “Staff Members Exceptions” is also a multi-iteration table. Click “New Row” to begin. With this table you will want to only fill out the field’s that are highlighted red. Based on the selections you make the system will mark the required fields for you.

Below are definitions for each of the fields. You will only need to enter data into the red required fields.

Index	Site 1	Recurring Or Individual 2	Recurrence Pattern 3	Exception Date 4	Recurrence Factor 5	# Of Sessions 6
1	LIVE Test Site	Individual (2)	--	11/19/2021	--	--
2	LIVE Test Site	Recurring (1)	Monthly (3)	11/17/2021	# Of Sessions (1)	999
3	LIVE Test Site	Recurring (1)	Weekly (2)			--

1. **Site**- Double click on the field, select the site from the drop-down that this exception will be applied to.
2. **Recurring or Individual**- Double click on the field, choose whether this exception will be a "Recurring" or an "Individual" exception.
3. **Recurrence Pattern**- Only used for recurring exceptions, double click to see the available options. Choose the recurrence pattern for your exception (will this exception be something that is daily, weekly, monthly, or yearly).
4. **Exception Date**- The date of the exception if it is an individual exception or the date that the recurring exception begins.
5. **Recurrence Factor**- Only used for recurring exceptions, double click to see the available options. The option for "# Of Sessions" can be used if the exception will be taking place a number of times. "Date Range" is used if the exception is going until a specific date. As an example, if there is a special project that you will be working on for the next five weeks you can either "# Of Sessions" and indicate this will happen five times or you can choose "Date Range" and indicate the "End Date".
6. **# Of Sessions**- Only used for recurring exceptions, if you choose "# Of Sessions" for your "Recurrence Factor" you will enter in how many times you want the recurrence to take place. "# Of Sessions" can also be used if the exception has no end date. You can enter in 999, that way it continues for a long period of time.

Exception End Date 7	Exception Type 8	Exception Description 9	Time Frame 10
--		Short Staff	Entire Day (C)
--		Staff Meeting	Selected Hours (S)
--			

7. **Exception End Date**- Only used for recurring exceptions, if you choose exception "End Date" you will enter the date in which the exceptions will no longer be in effect.
8. **Exception Type**- We currently do not use this field.
9. **Exception Description**- Give a brief description of what this exception is (vacation, meeting, lunch, etc.).
10. **Time Frame**- This will default to "Entire Day". If the clinician's schedule needs to be blocked off the entire day you can leave it as is. If the exception will only last for a certain time period, double click and choose "Selected Hours".

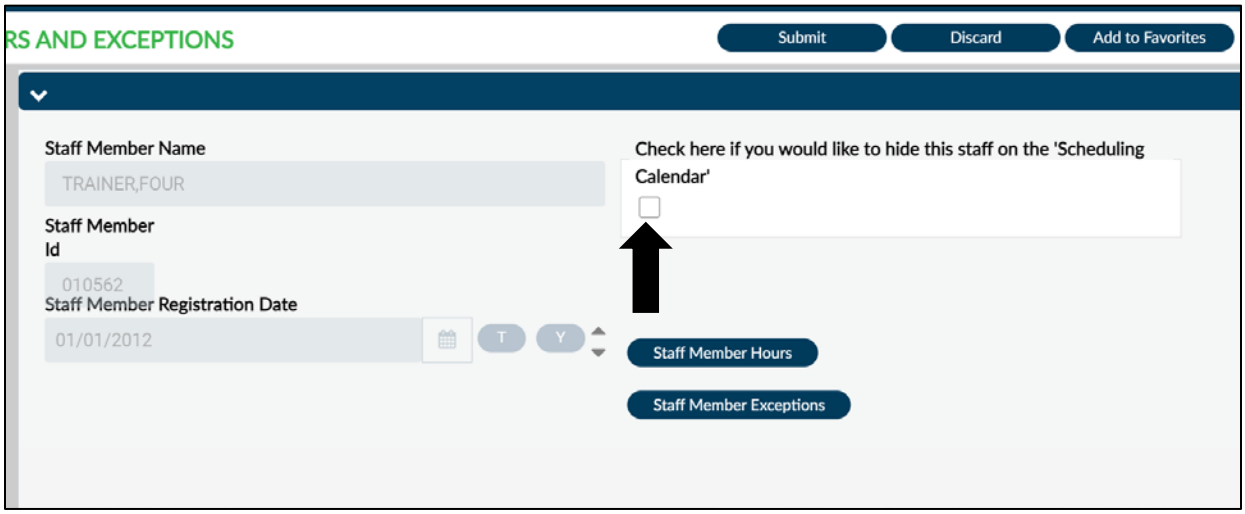
Start Time 11	End Time 12	Recur Every__ Weeks 13	Day Of The Week 14	Day Of Monthly Pattern 15	Frequency Of Selected Day 16
--	--	--	--	--	--
10:00 AM	11:00 AM	--	--	Wednesday (4)	Third (3)
--	--			--	--

11. **Start Time**- If the exception is set for "Selected Hours", enter the start time of the exception. Use military time or the following format 00:00 AM/PM.
12. **End Time**- If the exception is set for "Selected Hours", enter the end time of the exception. Use military time or the following format 00:00 AM/PM.
13. **Recur Every _ Weeks**- Only used if the recurrence pattern is set for "Weekly". Enter how many weeks this will take place (for example, 1 would mean this happens every week, 2 would mean this happens every two weeks, 3 would be every three weeks.)
14. **Day of the Week**- Only used if the recurrence pattern is set for "Weekly". Double click and choose the day of the week the exception will take place.
15. **Day of Monthly Pattern**- Only used if the recurrence pattern is set for "Monthly". Double click and choose the day of the week the exception will take place.
16. **Frequency of Selected Day**- Only used if the recurrence pattern is set for "Monthly". Double click and choose the frequency (for example, will the exception take place on the first, second, third, fourth, or last week of the month).

Yearly Type 17	Month/Day 18	Day Of Yearly Pattern 19	Day Frequency 20	Month 21
--	--	--	--	--
--	--	--	--	--
--	--	--	--	--

17. **Yearly Type**- Only used if the recurrence pattern is set for "Yearly". Double click and choose specific date if the exception will always take place on a specific date (their birthday for example) or "Other" of other criteria is used to choose the day.
18. **Month/Day**- Only used if "Specific Date" was chosen for "Yearly Type". Enter the month and day the exception will land on each year.
19. **Day of Yearly Pattern**- Only used if "Other" was chosen as "Yearly Type". Choose the day the exception will land on.
20. **Day Frequency**- Only used if "Other" was chosen as "Yearly Type". Double click and choose the frequency (for example, will the exception take place on the first, second, third, fourth, or last week of the month).
21. **Month**- Only used if "Other" was chosen for "Yearly Type". Choose the month that the Exception will take place.

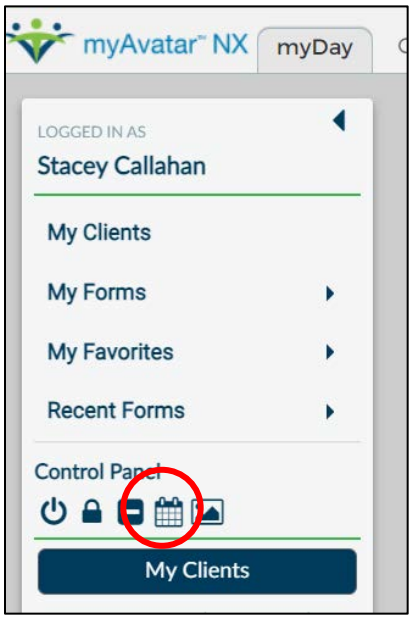
Once the Exceptions have been entered click on the Save button to go back to the previous screen.
Once the staff member's schedule and exceptions have been entered, click on the Submit button.



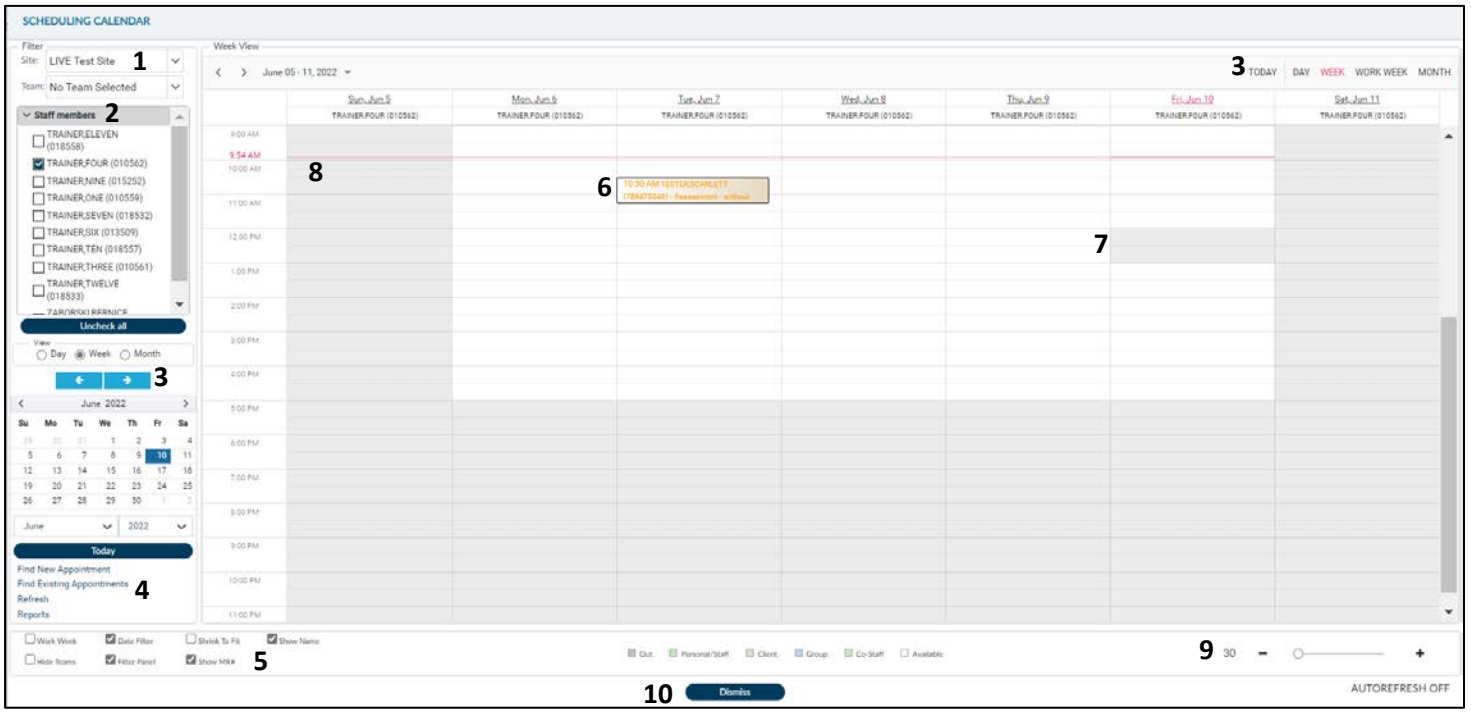
If the staff member goes on leave you are able to hide their schedule by marking the checkbox above.

Scheduling Calendar:

Once the staff member's schedule has been created they will now be visible on the Scheduling Calendar. The Scheduling Calendar is where you are able to enter in clinician's appointments. Click on the "Launch Scheduling Calendar" icon in the Control Panel to open the Scheduling Calendar.



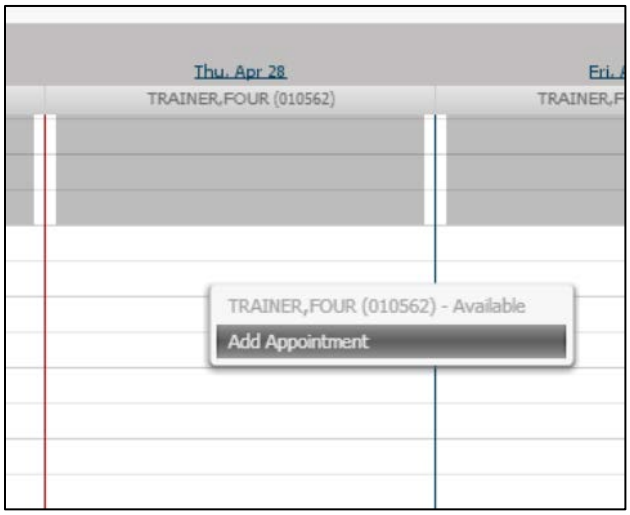
Below is an overview of the Scheduling Calendar.



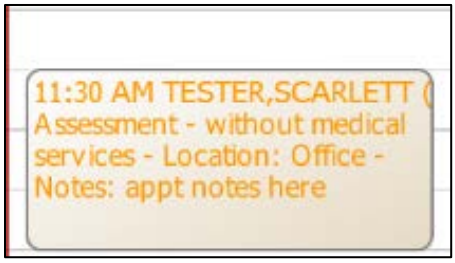
1. Select your agencies site from the drop down. If your agency has more than one site, you are only able to view one site at a time. You do not need to make a Team selection.
2. All clinicians at your site who have a schedule created in Staff Members Hours and Exceptions will be listed on the calendar. Check the staff member's calendar you would like to view, you can view multiple calendars at once.
3. The miniature calendar on the side allows you to navigate through the calendar. You are also able to change the type of view from daily, weekly, to monthly.
4. The links on the side allow additional tools for creating and finding appointments. It also allows you to refresh the calendar and pull up various reports.
5. The filters on the bottom allows you to customize how you see your appointments. You are able to hide details such as the client name and ID number.
6. Appointments will show on the clinician's calendar.
7. Grey areas are times that the clinician is unavailable (exceptions). This is based on the schedule you set up for them in the Staff Members Hours and Exceptions form. If you hover over the Exception you will see the details of that Exception.
8. The red line across the calendar shows the current time of day. The current time will also update on the far left.
9. The slide bar allows you to change the appointment time increments, it goes down as low as to 5 minute increments.
10. The Dismiss button closes the Scheduling Calendar. You may also need to close the browser window.

Creating an appointment for a specific clinician:

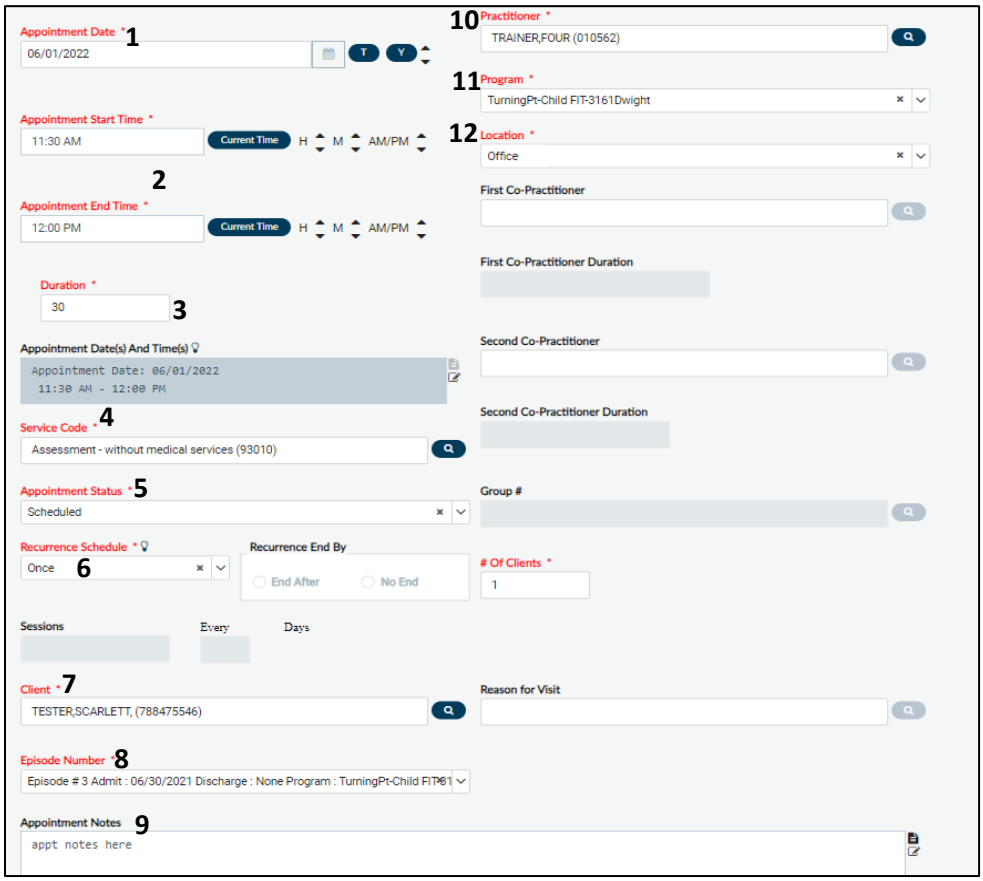
This is used to create an appointment for a specific clinician while viewing their calendar. Choose the clinician on the left-hand side of the calendar and right click on the date and time of the appointment. Choose Add Appointment.



The Appointment Details screen will pop up in a separate window. Some of the information will populate based on the calendar, date, and time, which was chosen. Fill in the appointment details and submit the form. Once an appointment is created you can see the details of the appointment.



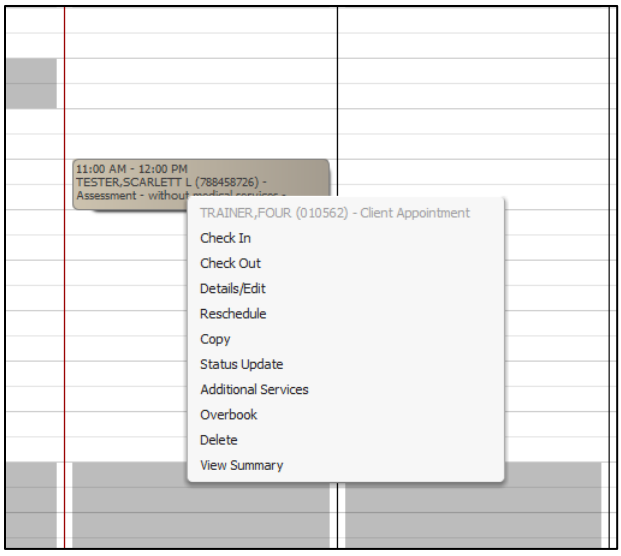
Appointment Details



1. **Appointment Date:** This will populate based on the date you chose on the calendar.
2. **Appointment Start/End Time:** This will populate based on the time you chose on the calendar.
3. **Duration:** This will populate base on your start/end times. If you modify the duration it will update the end time.
4. **Service Code:** Enter the service code for the appointment. This is meant as a placeholder, it will not affect billing. The clinician will be able to bill for any services provided when completing their progress note.
5. **Appointment Status:** This will default to Scheduled but you can change it if the status changes.
6. **Recurrence Schedule:** This will default to Once but you can add a recurrence schedule.
7. **Client:** Enter your client name/ID.
8. **Episode:** The episode will populate to the most current, make sure it is the correct episode for your program.
9. **Appointment Notes:** You can enter any notes for this appointment. The notes will show up on your reports.
10. **Practitioner:** This will populate based on the calendar you added the appointment in.
11. **Program:** This will populate based on the episode chosen.
12. **Location:** Enter the location where the appointment will take place.

Appointment Options:

If you right click on an appointment in the calendar you will get a list of options. Below is a summary of what each option does.



- Check In: Allows users to check-in the client for their appointment. You can also use the Front Desk form to check check-in an appointment.
- Check Out: Allows users to check-out a client. This will create a service, typically this is only used by users with their own EHR if they do not want to enter a service separately.
- Details/Edit: Brings you back to the Appointment Details screen, where you can edit the appointment.
- Reschedule: Allows users to reschedule appointments. When you click on this your appointment will grey out, find the new date and time you want to move the appointment to. Right click on the calendar and choose the option Paste Appointment.

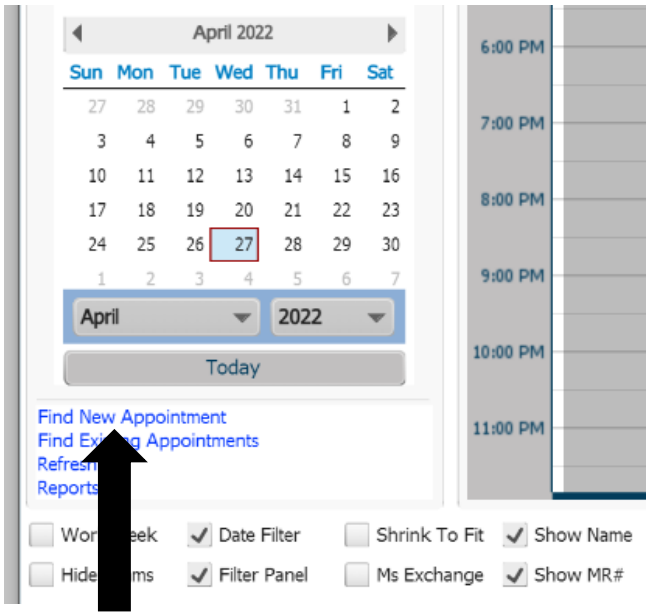
- Copy: Creates a copy of the appointment. This works similar to reschedule, find where you want to place the second appointment, right click and Paste Appointment. This will create a copy of the appointment, it will not remove the first appointment.
- Status Update: Allows users to confirm an appointment or log a missed appointment.
- Additional Services: Not currently being used.
- Overbook: Allows you to schedule more than one appointment at a specific time.

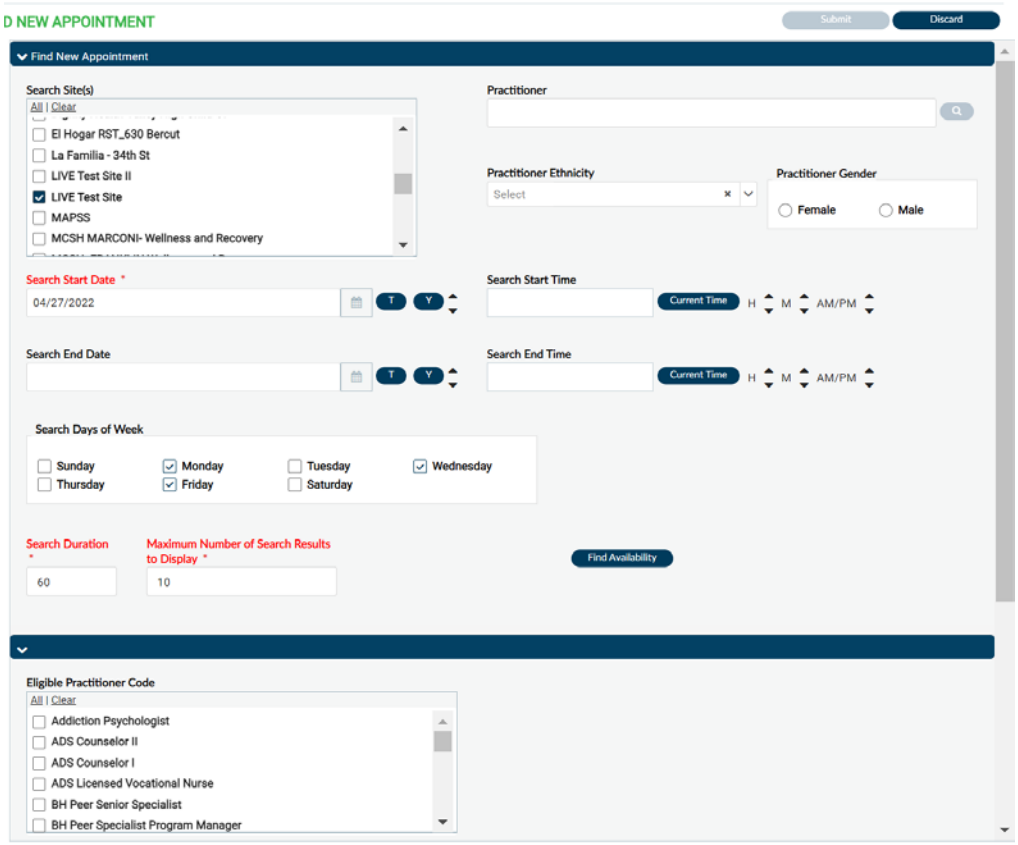
- Delete: Should only be used if an appointment was done in error. If a client did not show up for an appointment, use Status Update to log the missed appointment.
- View Summary: Shows the details of the appointment.

Finding an available appointment:

Used to find an available appointment by checking the client's availability.

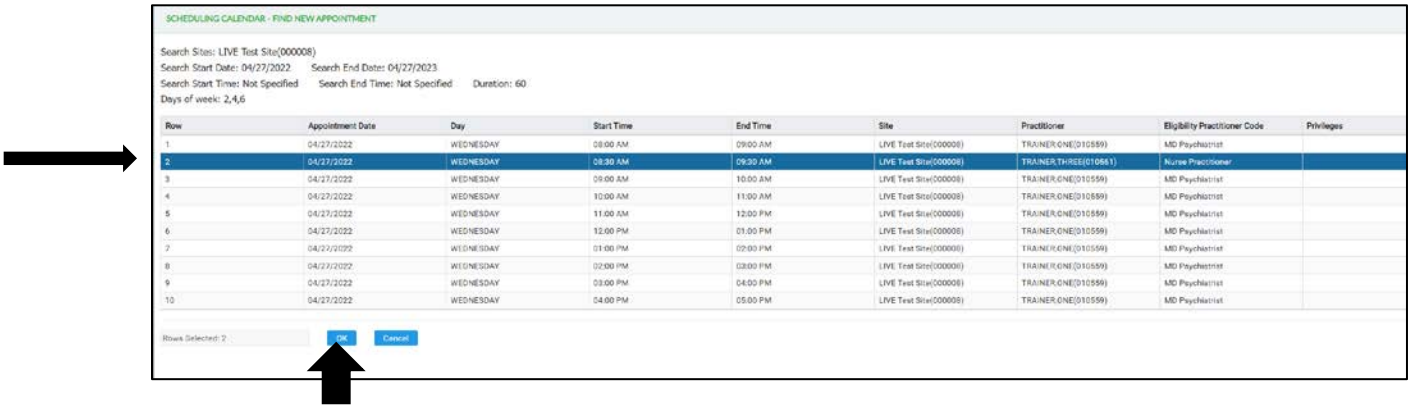
1. Click on the Find New Appointment hyperlink on the left-hand side. A separate window will open.





2. Enter in as much criteria as you have/need to create a new appointment. The criteria you enter is based on the client's availability and preference. The more criteria you enter, the narrower your results will be. You are able to search for:
    a. Your specific site
    b. A date range (start date is required)
    c. Specific time frames
    d. Specific days of the week
    e. Specific practitioner
    f. Practitioner's gender or ethnicity
    g. Practitioner's classification
3. Search Duration is the time frame you want the appointment to be
4. Maximum Number of Search Results to Display shows how many appointments will display in your search.
5. Click Find Availability to view your results.

6. A list of all available appointments will show. Click on the appointment you want to choose and click Ok on the bottom left.

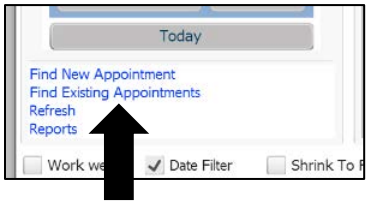


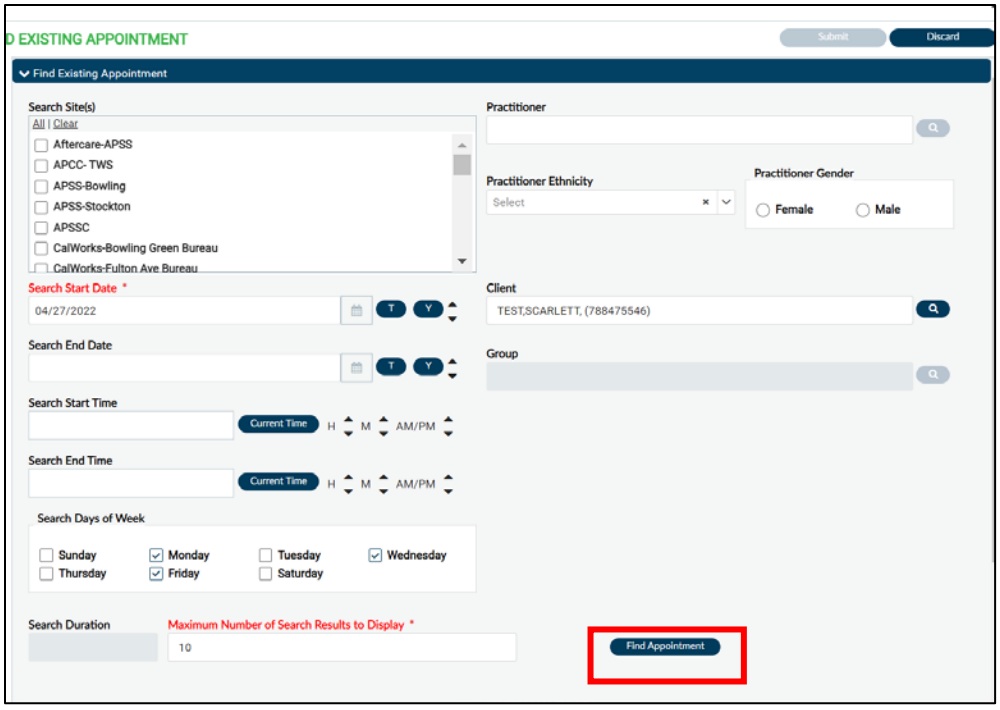
7. When you click Ok it will bring you to the Appointment Details screen. Fill out the appointment information. Submit to save.

Find Existing Appointments:

Used to find an existing appointment if the client does not know/remember their appointment day or time.

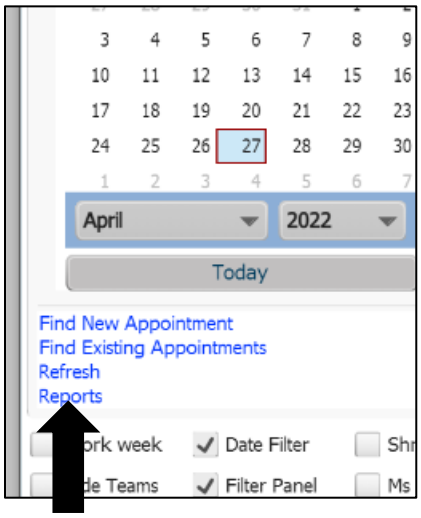
1. Click on the Find Existing Appointments hyperlink on the left-hand side. A separate window will open.

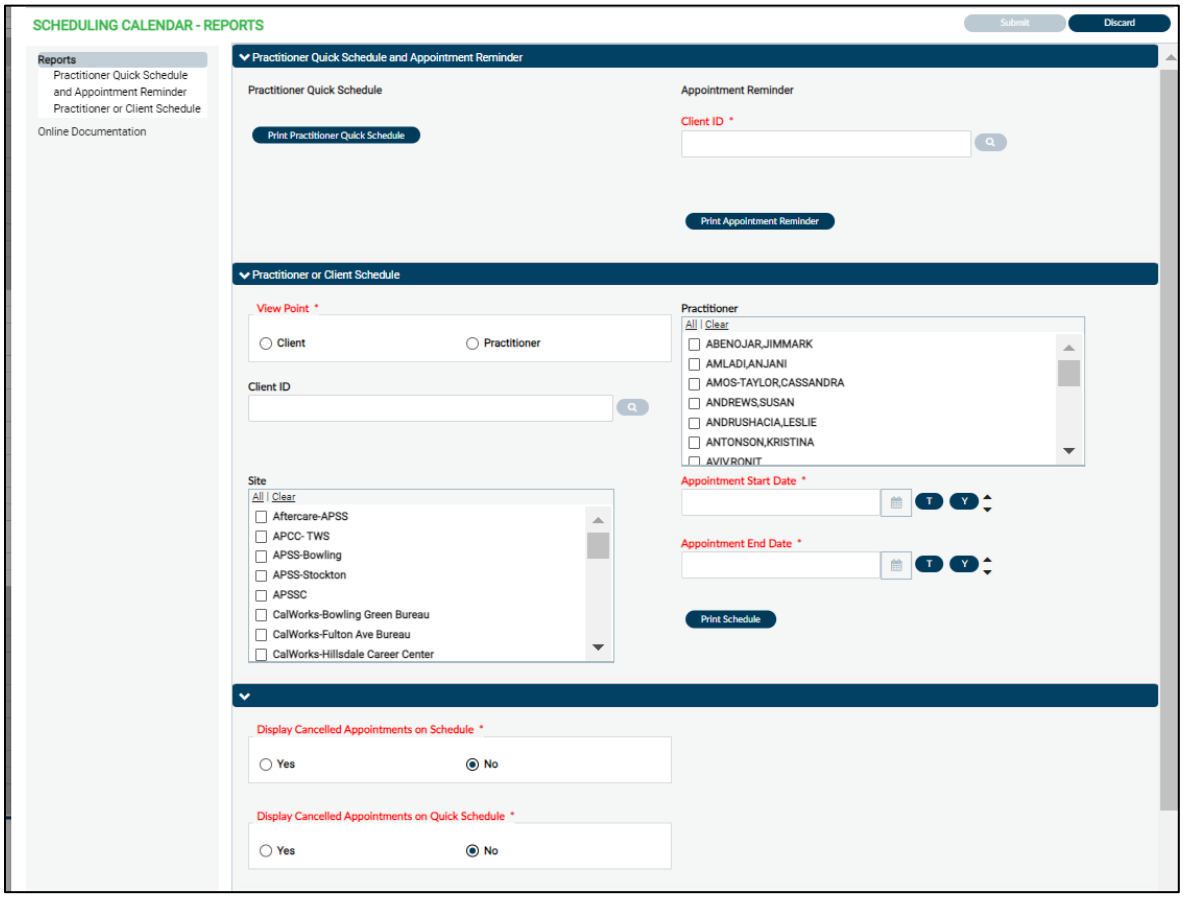




2. Enter in any criteria that will help to find the appointment. You are able to enter date ranges if you do not know the specific date of the appointment. Click Find Appointment to view any appointments that fit that criteria.
3. Any appointments fitting the criteria you entered will be listed. You can see the details of that appointment on the row.

Reports



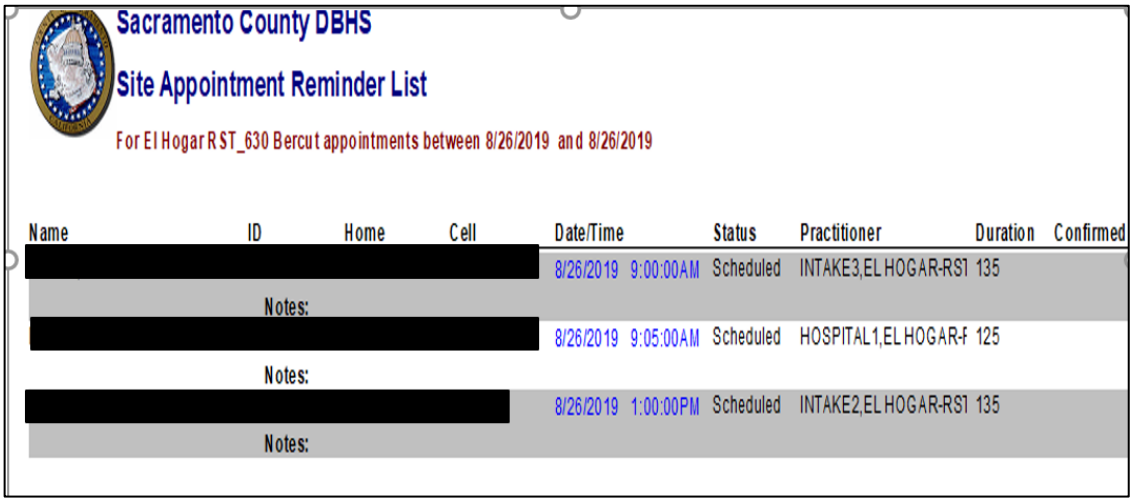


- Print Practitioner Quick Schedule: Found in the Scheduling Calendar under the Reports button (shown above). This report has no criteria, click the Print Practitioner Quick Schedule button to view all clinician's schedules at your site for the week.

- Print Appointment Reminder: Found in the Scheduling Calendar under the Reports button. Type in the client ID and this report will show all of the upcoming appointments for that client.
- Practitioner or Client Schedule: Found in the Scheduling Calendar under the Reports button. Can be run from either the view point of the practitioner or the client. Enter your criteria and click Print Schedule. This will either show you the schedule for a practitioner or appointments for a specific client. The criteria you enter will determine what appointments will show on the report.

Other Reports

- Site Appointment Reminder List: This is not found in the Scheduling Calendar, search the form name on the Home screen. Enter your agencies site and the date period that you want to see appointments. This will show all appointments for your agency for that time period. If you click on the hyperlink under Date/Time, it will take you to the details of that appointment.



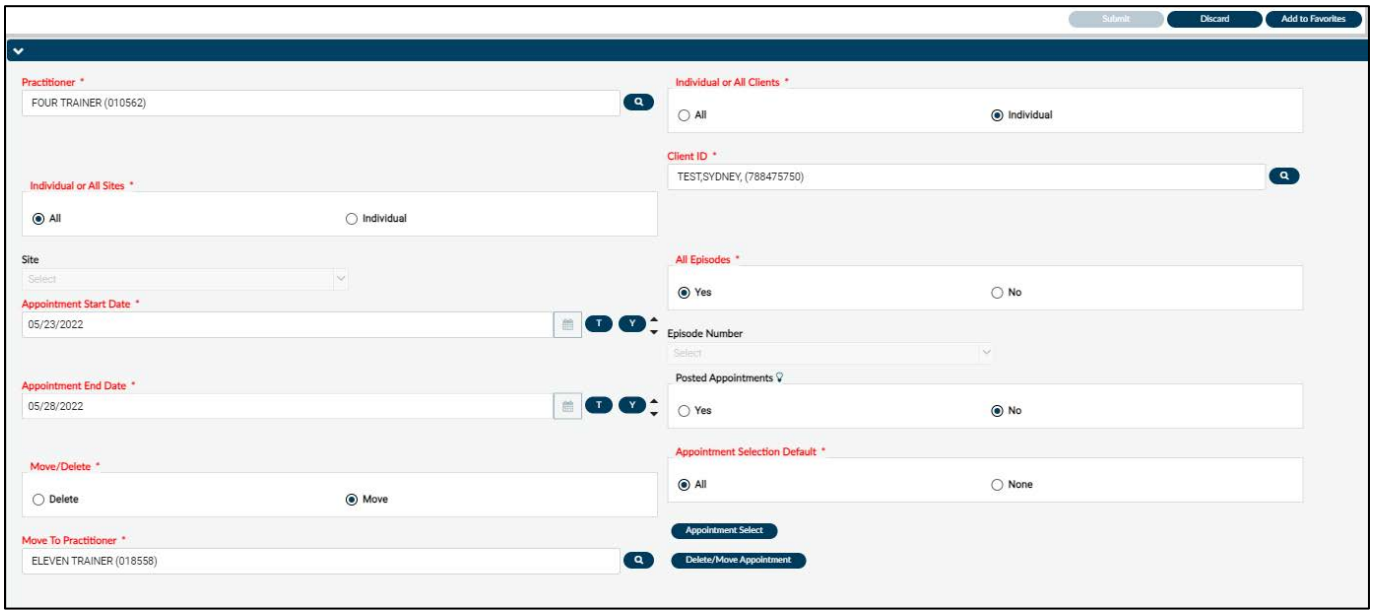
Sacramento County DBHS

Site Appointment Reminder List

For El Hogar RST_630 Bercut appointments between 8/26/2019 and 8/26/2019

Name	ID	Home	Cell	Date/Time	Status	Practitioner	Duration	Confirmed
[redacted]				8/26/2019 9:00:00AM	Scheduled	INTAKE3,EL HOGAR-RST	135	
Notes:								
[redacted]				8/26/2019 9:05:00AM	Scheduled	HOSPITAL1,EL HOGAR-F	125	
Notes:								
[redacted]				8/26/2019 1:00:00PM	Scheduled	INTAKE2,EL HOGAR-RST	135	
Notes:								

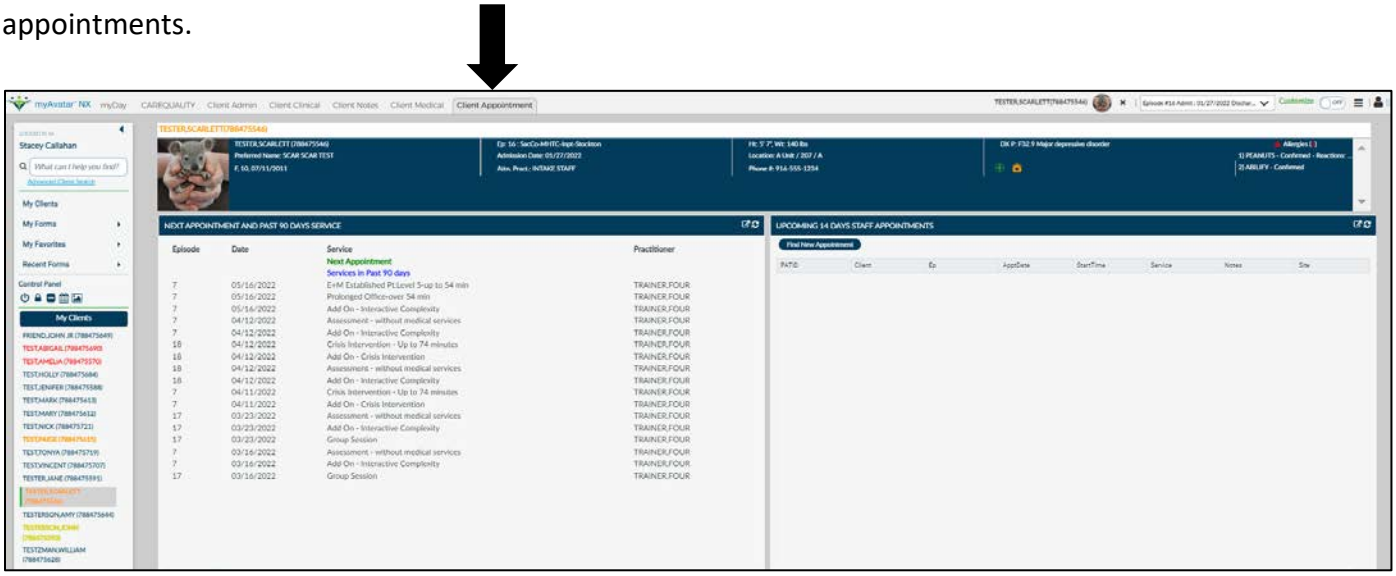
Moving/Deleting Appointments:



- Use the appointment Move/Delete form to move or delete multiple appointments. You are able to move or delete either all clients or individual client appointments. This is not found in the Scheduling Calendar, search the form name on the Home screen.
- Enter in the red and required fields. Once all criteria has been entered Click on the Appointment Select button. This will show all appointments that fit the criteria you entered. Select the appointment(s) you want to move or delete. Click on the Delete/Move Appointment button to move or delete the appointments.

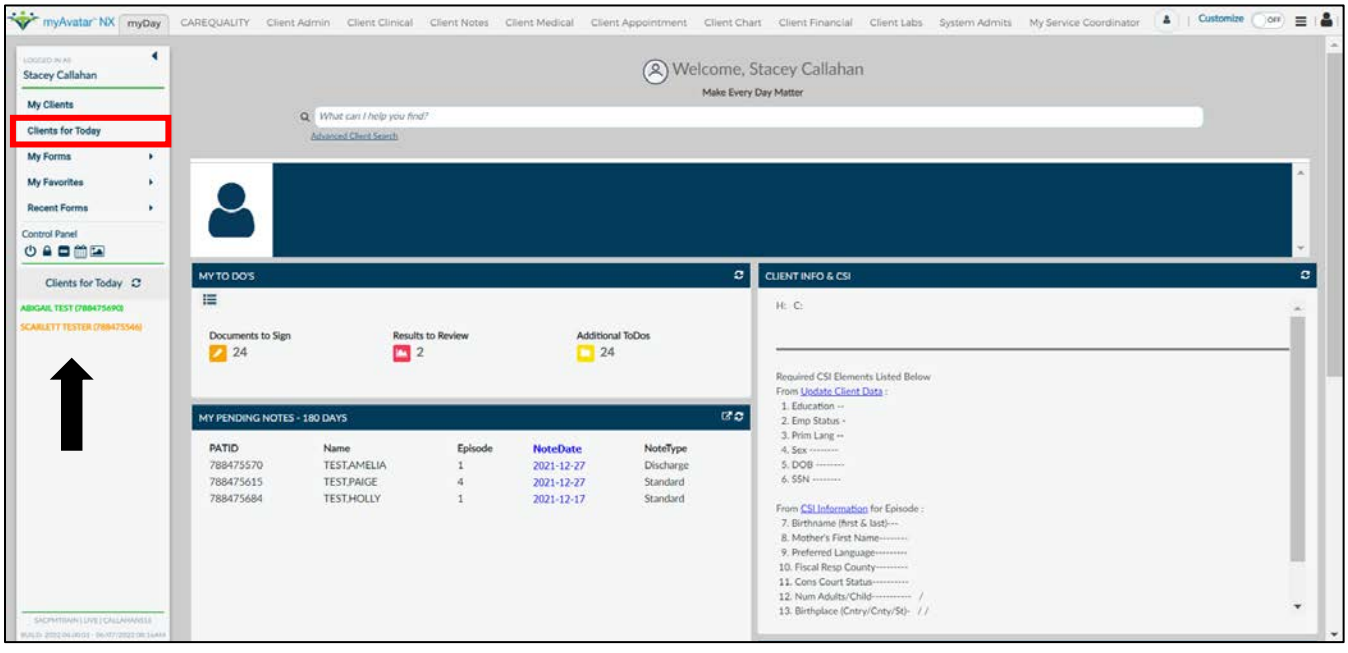
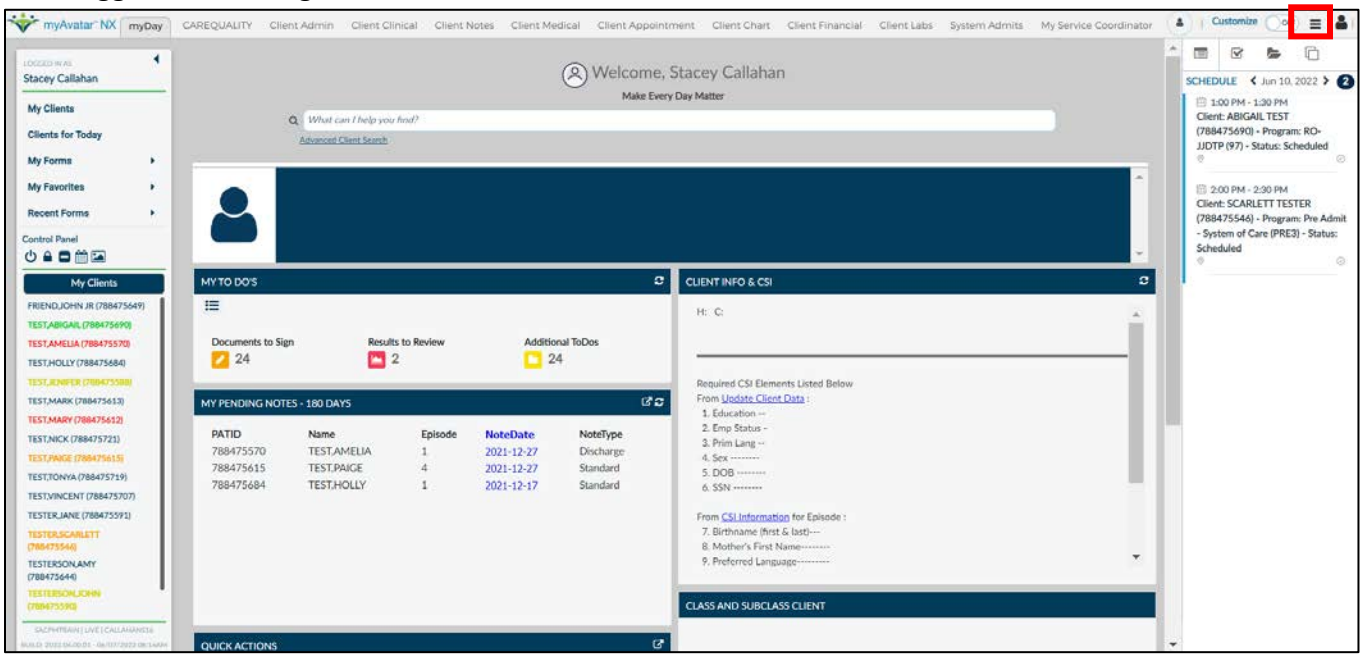
Client Appointment Console:

If a client is highlighted it will show the details of their previous appointments and upcoming appointments.



Clients for Today:

If you have clients scheduled for the day click on the “Clients for Today” button and it will replace your “My Clients” list with the clients you have scheduled that day.



You can also click on the “My Activity” button on the top right of your screen and that will list any appointments for the day. You can also use the arrows to see previous or upcoming appointments. This feature does not refresh in real time. If an appointment was made during your current session of Avatar you will not see the appointment listed. It will populate after you have logged out and log back in.