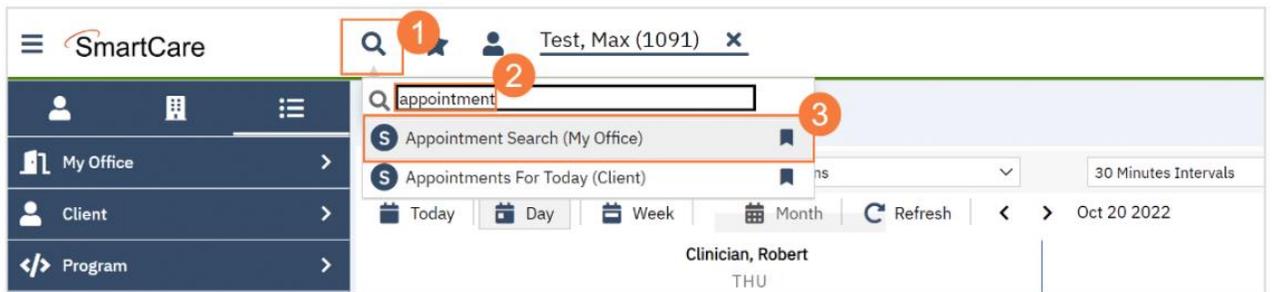


SmartCare search words are in **bold** throughout guide.

## How to Use the Appointment Search Screen

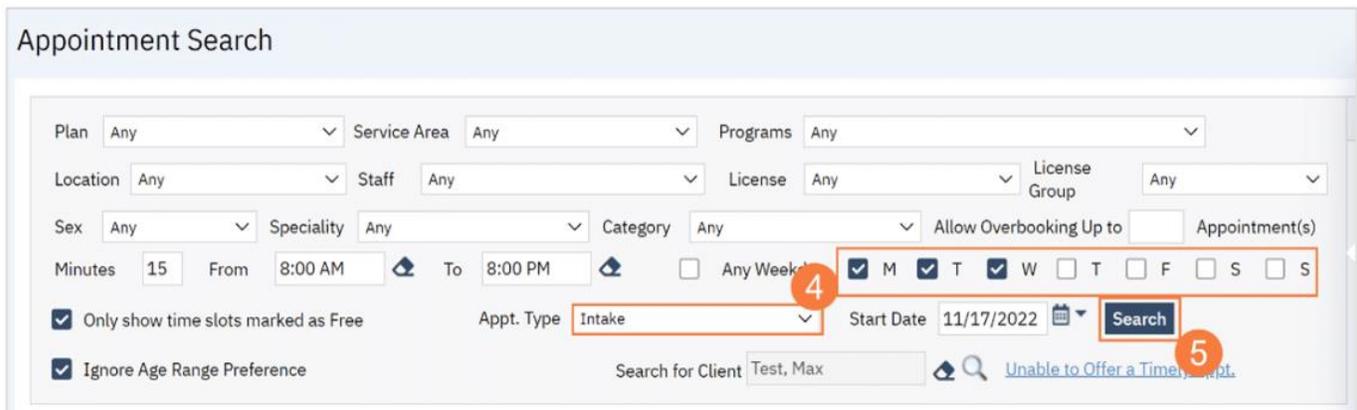
Note: This feature only works AFTER reoccurring events have been added to Staff Calendar (How-to discussed later in this guide. Also, although the client doesn't have to be Enrolled in a program, they do need to have a program assigned to them in the Requested status, to be able to schedule the appointment.)

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.

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

	Staff Name	Date/Time	Duration	Type	Location Name
	 Sullivan, Kevin	11/21/2022 8:00 AM	210 mins	Intake	Community Mental Health Center
	 Stephan, Kristy	11/21/2022 8:00 AM	120 mins	Intake	
	 Clinician, Robert	11/21/2022 8:00 AM	120 mins	Intake	
	 Clinician, SUD	11/21/2022 8:00 AM	120 mins	Intake	
	 Clinician, Robert	11/21/2022 1:00 PM	180 mins	Intake	

- 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.

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

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

**Service Detail** | Billing Diagnosis | Authorization(s)

**Service**

Client... TestCH\_Client | Status  Scheduled | Start Date 11/21/2022 |  Client is not enrolled in this program. | Program  MH Screening

Procedure  Assessment | Modifier... | Start Time 8:00 AM | Total Duration 15 Minutes

Clinician Name Clinician, SUD | End Date 11/21/2022

Location  Community Mental Health Center | Attending | Referring

Client was present | Other Person(s) Present | Cancel Reason

Group... | Charge \$0.00 | Balance | Rate ID

Billable |  Do Not Complete

Travel Time | Minutes | Note

Face to Face Time | Minutes

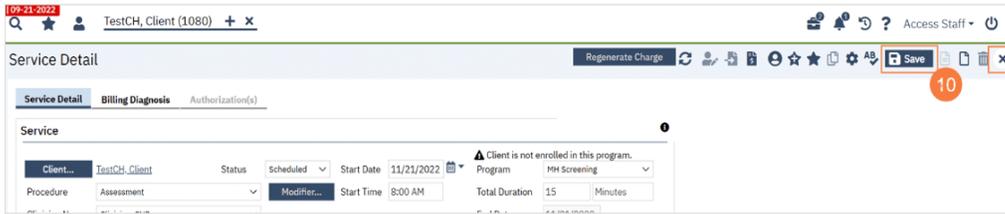
Documentation Time | Minutes

Evidence Based Practices |  Override Charge Amount | Overridden By

Transportation Service No |  Override Errors | Overridden By

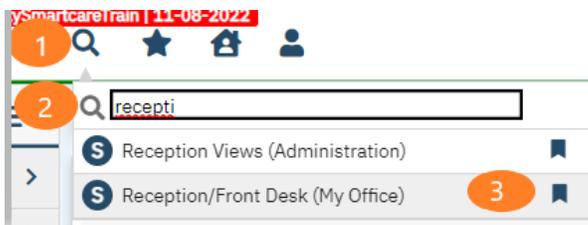
Interpreter Services Needed

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

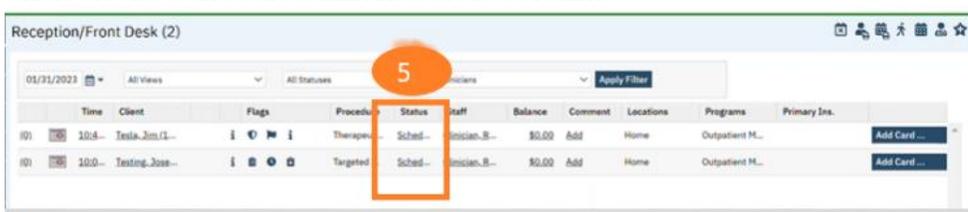


## How to Check-in a client.

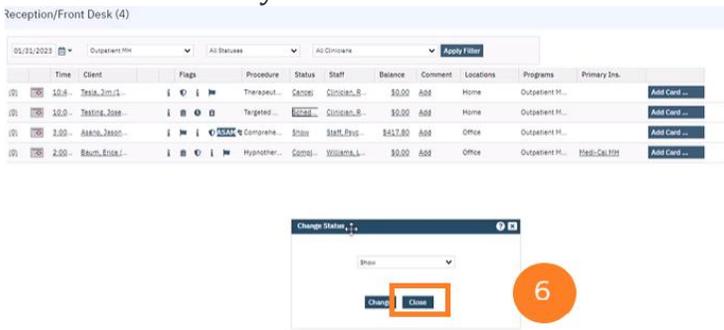
1. Click the Search icon.
2. Type **Reception** in the search bar.
3. Click to select **Reception-Front Desk (My Office)**



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.



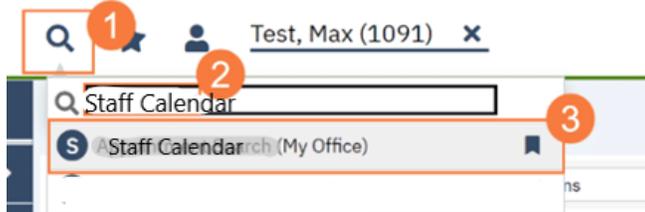
6. It will automatically default to Show. Click Close.



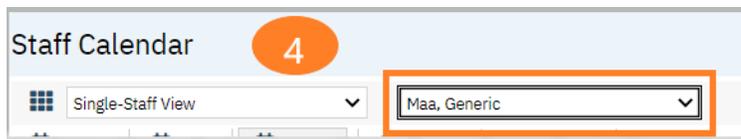
Note: Once the client has been checked-in, it will display as “Show” on the staff’s Appointments for Today widget. Staff should be encouraged to frequently refresh their Appointments for Today widget.

## 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)**



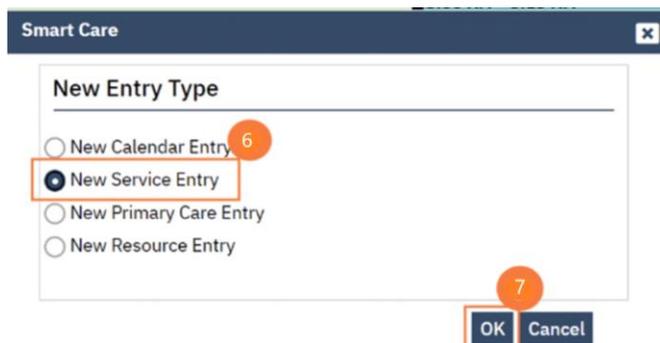
4. Select the staff you want to schedule for.



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.

The screenshot shows the 'Client Search' window within a 'Staff Calendar' application. The window has a 'Clear' button and a 'Name Search' section with checkboxes for 'Include Client Contacts' and 'Only Include Active Clients'. The 'Broad Search' button is highlighted with a red box and a circled '8'. Below it, the 'Last Name' field contains 'Mh generic' and the 'Type of Client' is set to 'Individual'. The 'Other Search Strategies' section includes buttons for SSN, DOB, Primary Clinician, Authorization ID, Phone #, Master Client ID, Client ID, and Insured ID searches. The 'Records Found' table has columns for ID, Master ID, Client Name, Chosen Name, SSN/EIN, DOB, Status, City, and Primary Clinician. The row with ID 400005 is highlighted with a red box and a circled '9'. At the bottom right, the 'Select' button is highlighted with a red box and a circled '10'.

ID	Master ID	Client Name	Chosen Name	SSN/EIN	DOB	Status	City	Primary Clinician
400020	400020	Mh Client, Fictio...		7891	01/01/19...	Active	SAN LUIS...	Gabriel, Mary Ka...
400004	400004	Mh Client, Fictio...		0004	04/01/19...	Active	SAN LUIS...	Gabriel, Mary Ka...
400005	400005	Mh Client, Fictio...		0005	05/01/19...	Active	SAN LUIS...	Gabriel, Mary Ka...
400006	400006	Mh Client, Fictio...		0006	06/01/19...	Active	SAN LUIS...	Heintz, Molly
40009	40009	Mh Client, Fictio...		0019	02/23/19...	Active		
400001	400001	Mh Client, Fictio...		0001	01/01/19...	Active	SAN LUIS...	Heintz, Molly

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.

The screenshot shows the 'Progress Note (MH)' form. At the top, there are fields for 'Effective' (11/21/2022), 'Status' (New), and 'Author' (Clinician, Robert). Below this are tabs for 'Service', 'Note', 'Billing Diagnosis', and 'Warnings'. The 'Service' section contains the following fields:

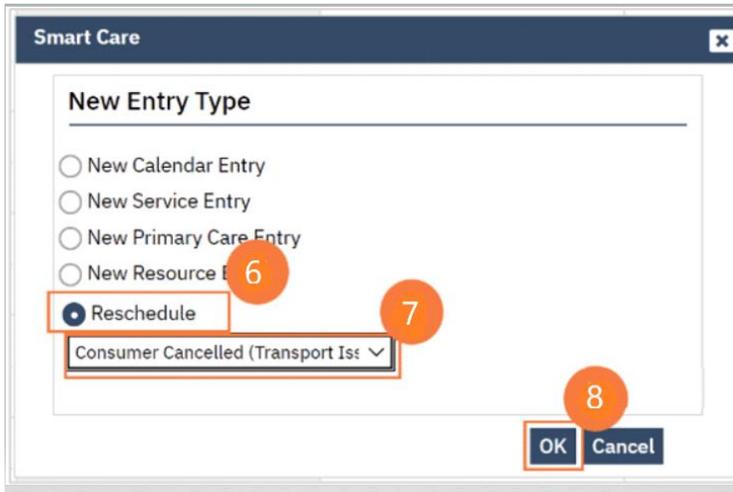
- Status: Scheduled (dropdown)
- Program: Outpatient MH Adult (dropdown, highlighted with a red box and number 11)
- Procedure: Therapeutic Behavioral Services (dropdown, highlighted with a red box and number 12)
- Location: Community Mental Health Center (dropdown, highlighted with a red box and number 13)
- Clinician: Clinician, Robert
- Cancel Reason: (dropdown)
- Start Date: 11/21/2022 (calendar icon)
- Start Time: 08:30 AM
- Travel Time: (input field) Minutes
- Face to Face Time: (input field) Minutes
- Documentation Time: (input field) Minutes
- Total Duration: 60 (input field) Minutes (highlighted with a red box and number 14)
- Attending: (dropdown)
- Referring: (dropdown)

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

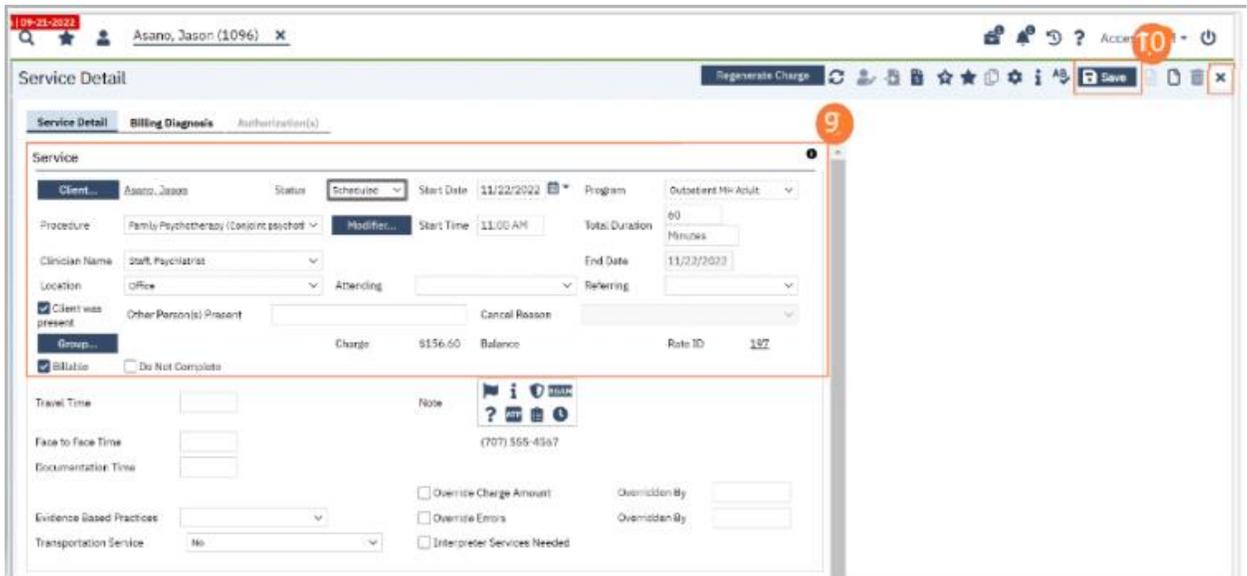
This screenshot shows the same 'Progress Note (MH)' form as above, but with the 'Save' and 'Close' icons in the top right corner highlighted with a red box and number 15. The 'Save' icon is a floppy disk, and the 'Close' icon is an 'X'.



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.

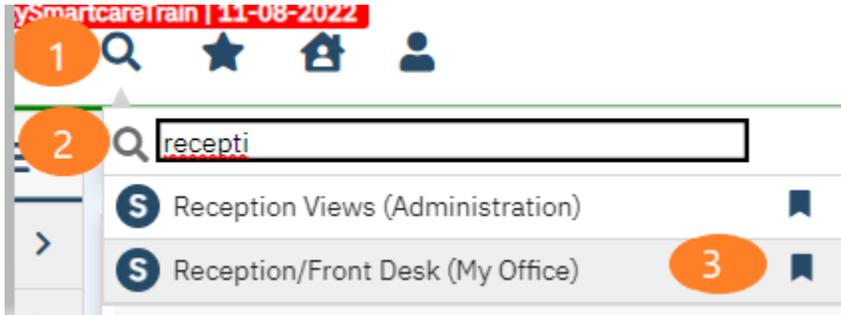


9. The Service Entry window will open, ensure all the information is correct.
10. Click Save to reschedule the appointment. Click the X to close.

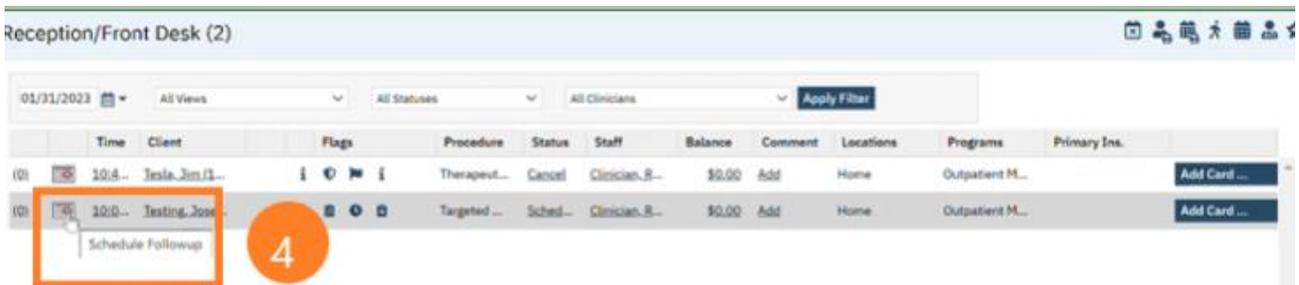


## How to Schedule a Follow-Up Appointment

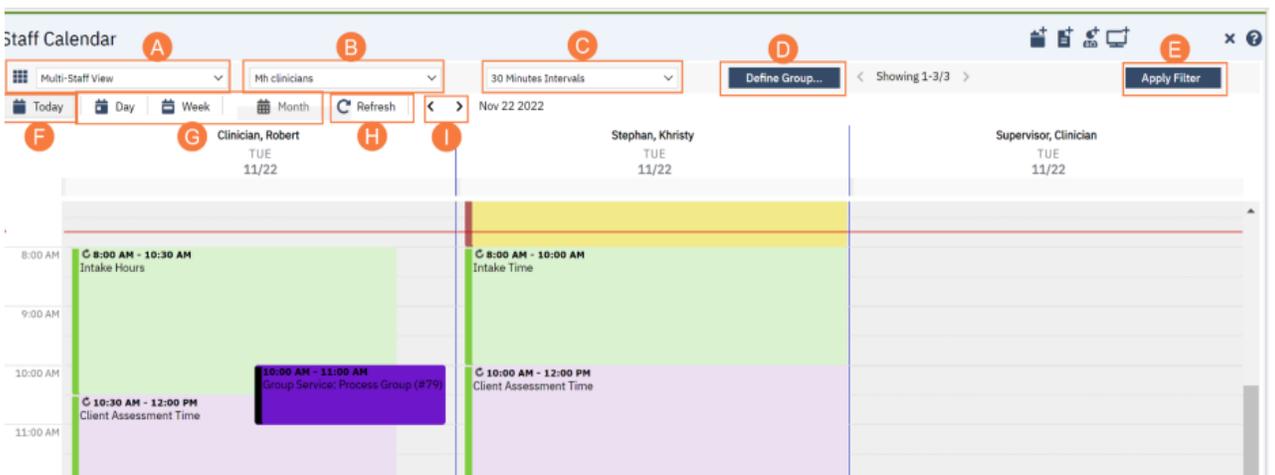
1. Click the Search icon.
2. Type **Reception** in the search bar.
3. Click to select **Reception-Front Desk (My Office)**



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)

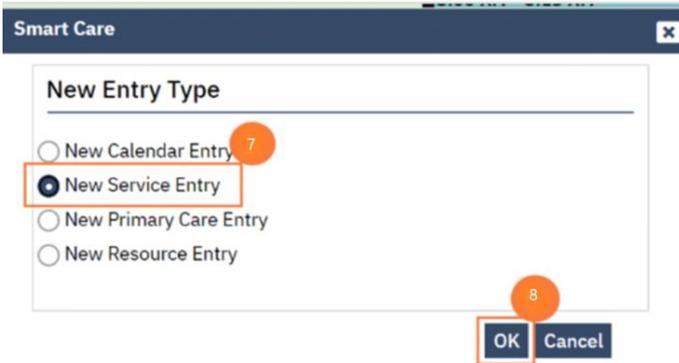


- Click and drag your mouse on the calendar timeslot you want to book.



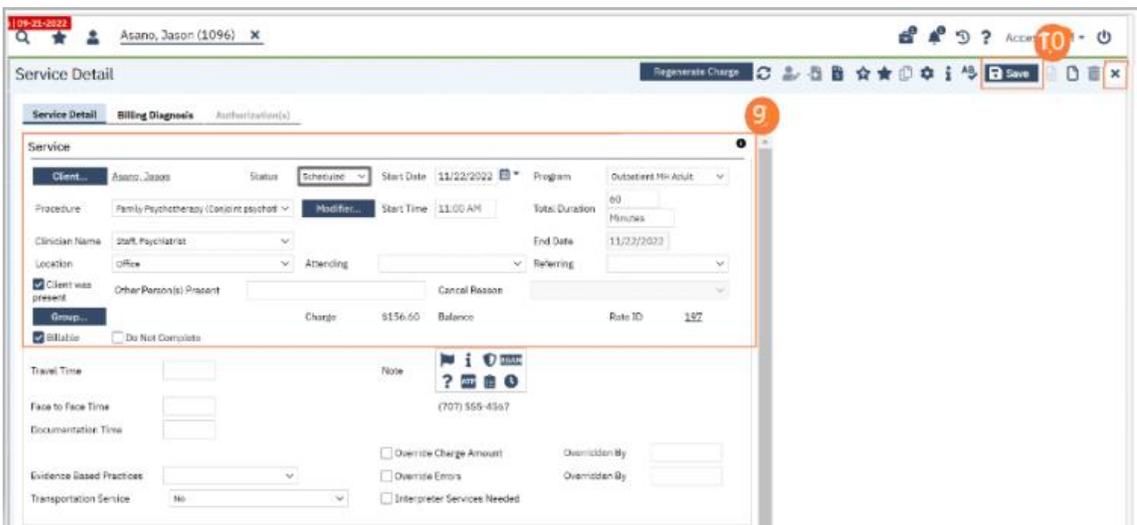
- In the New Entry Type pop-up, select the New Service Entry radio button.

- Click OK.



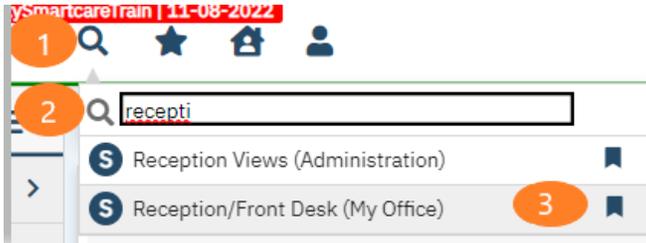
- The Service Entry window will open, ensure all the information is correct.

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

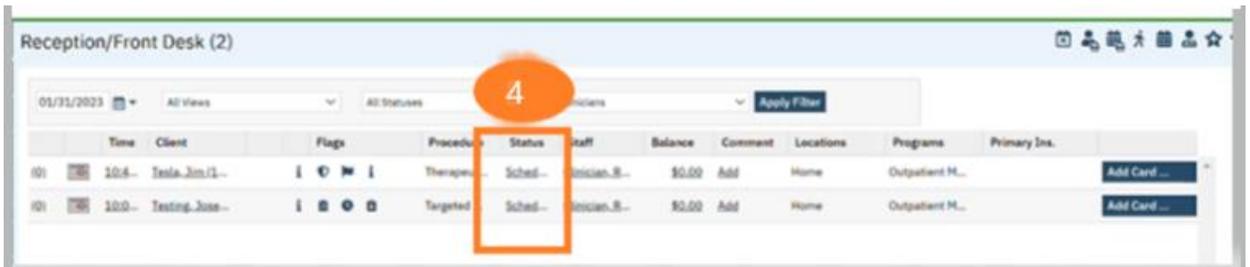


## How to Document a No-Show

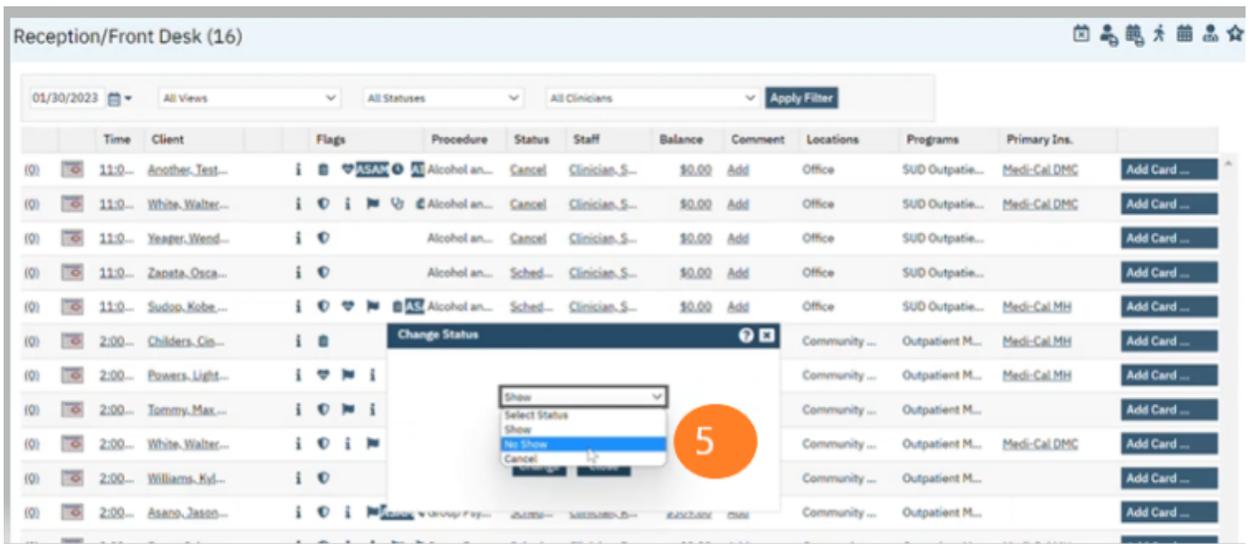
1. Click the Search icon.
2. Type **Reception** in the search bar.
3. Click to select **Reception-Front Desk (My Office)**



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.



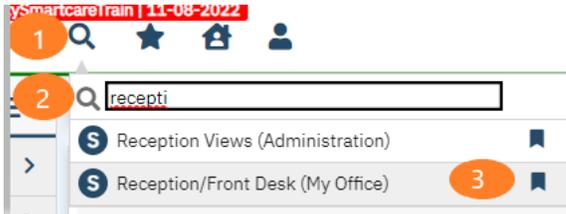
5. Select No Show. Click OK



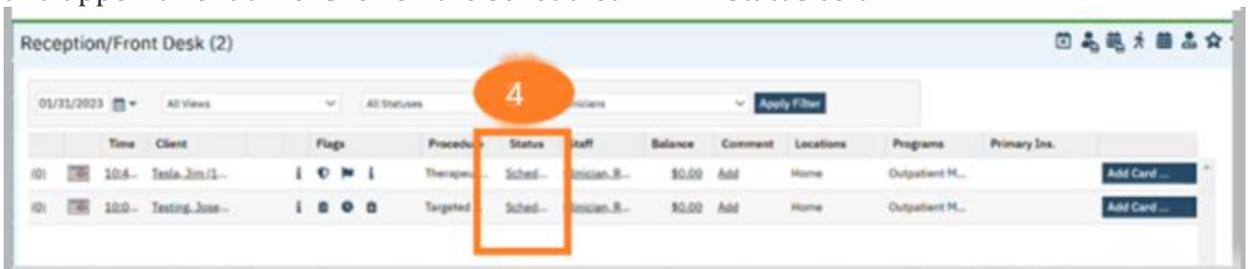
6. Once you have indicated client was a no-show, it will display as "No Show" on the staff's Appointments for Today widget.

## How to Cancel an Appointment

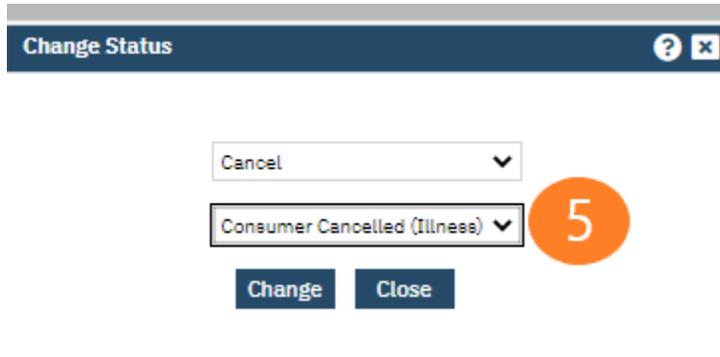
1. Click the Search icon.
2. Type **Reception** in the search bar.
3. Click to select **Reception-Front Desk (My Office)**



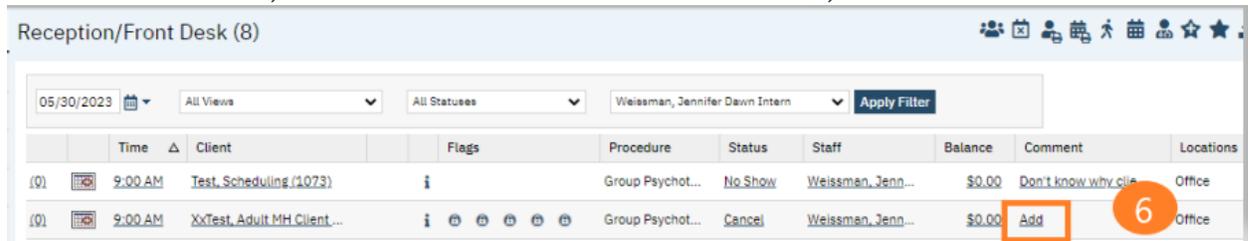
4. In the Reception/Front Desk screen, locate the correct client along with correct staff and appointment time. Click on the Scheduled link in Status column.

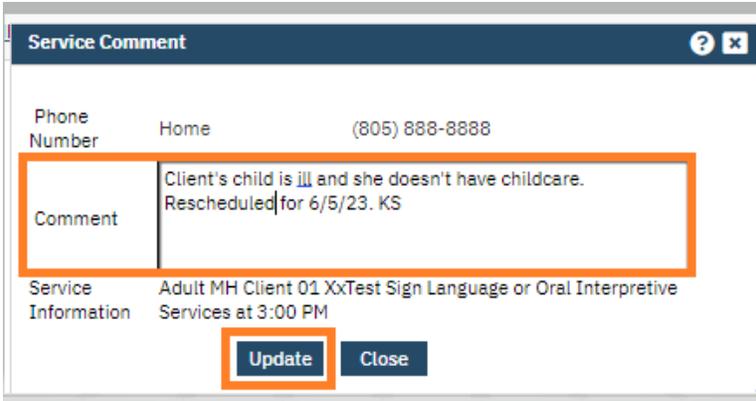


5. Select Cancel. Select Cancellation reason. Click OK.



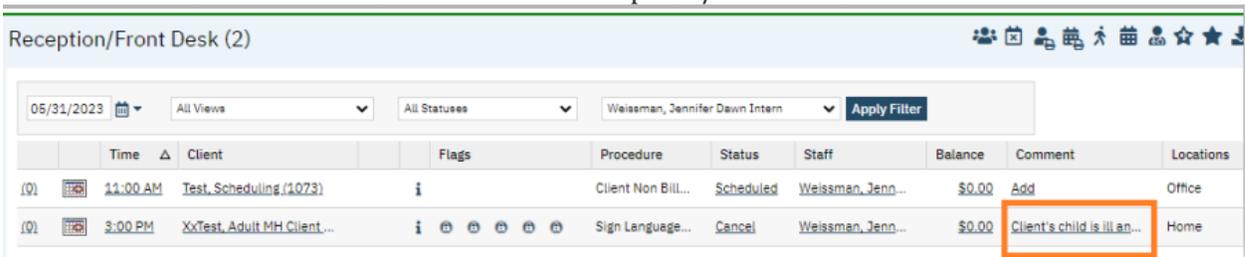
6. You may click the Add link to open a comment box where you can elaborate on the cancellation reason, indicate when client was rescheduled to, etc.



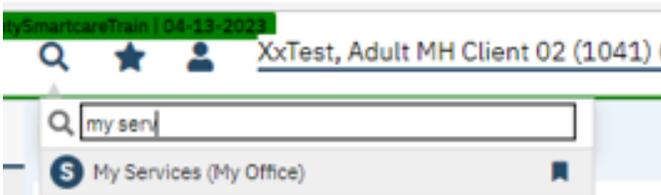


Note: If there is a phone number that has been entered into the Client Information screen, it will display here in the Comment box in the Phone Number field.

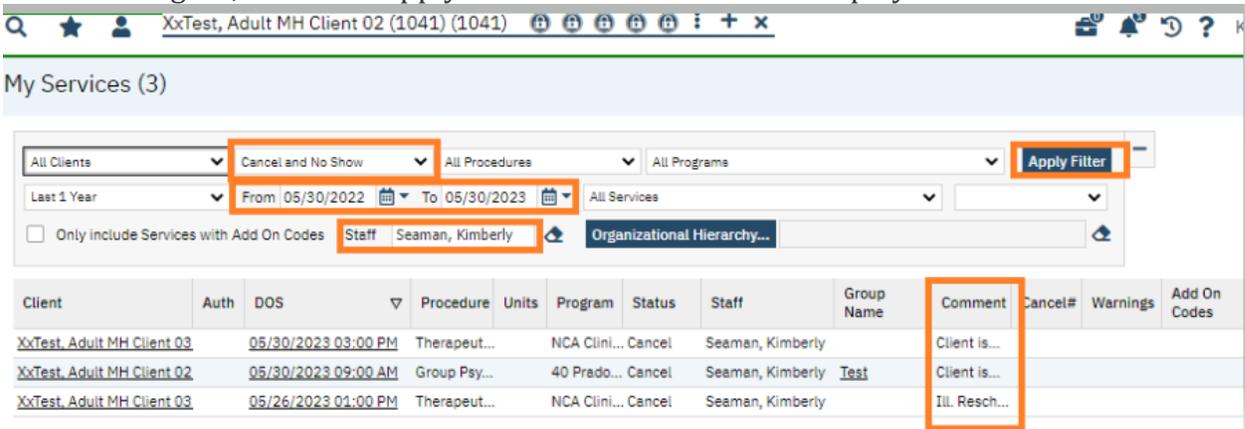
The comments will now be shown on the Reception/Front Desk screen.



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



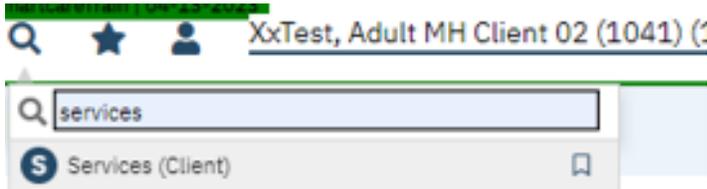
Change the All-Statuses field to cancel and no show, select the date range and staff you are searching for, then click apply filter. The Comment will display.



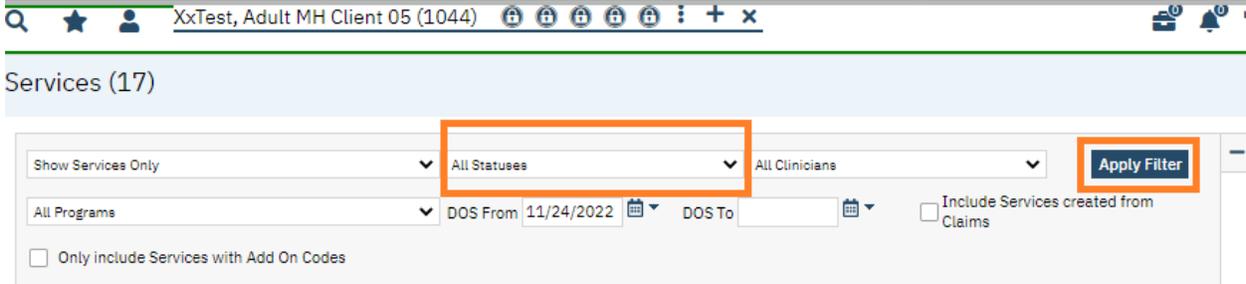
## How to view Cancelled & No-Show Appointments and see when they were cancelled.

(AZ equivalent=Scheduled services tab)

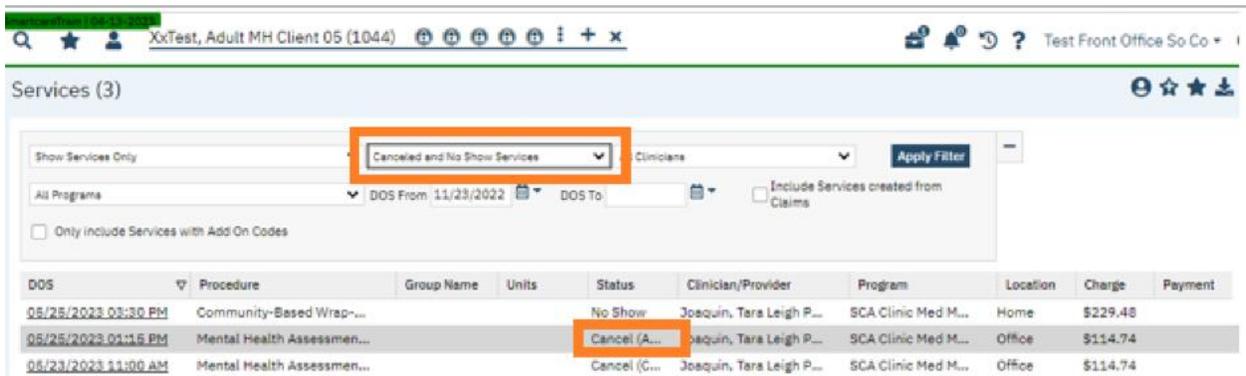
With the client open, search **Services** and select **Services (Client)**.



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.

Services (3)

Show Services Only: Canceled and No Show Services | All Clinicians | Apply Filter

All Programs | DOS From: 11/24/2022 | DOS To: | Include Services created from Claims:  | Only include Services with Add On Codes:

DOS	Procedure	Group Name	Units	Status	Clinician/Provider	Program	Location
<a href="#">05/25/2023 03:30 PM</a>	Community-Based Wrap-...			No Show	Joaquin, Tara Leigh P...	SCA Clinic Med M...	Home
<a href="#">05/25/2023 01:15 PM</a>	Mental Health Assessmen...			Cancel (A...	Joaquin, Tara Leigh P...	SCA Clinic Med M...	Office
<a href="#">05/23/2023 11:00 AM</a>	Mental Health Assessmen...			Cancel (C...	Joaquin, Tara Leigh P...	SCA Clinic Med M...	Office

Hover your cursor over the i icon.

Service Detail

Regenerate Charge | [i] | Save | X

Service Detail | Billing Diagnosis | Authorization(s)

Service

Client: XxTest, Adult M... | Status: Cancel | Start Date: 05/23/2023 | Program: SCA Clinic Med Mgr Adult

Procedure: Mental Health Assessment by Non-Phys | Start Time: 11:00 AM | Face to Face Time: 30 Minutes

Clinician Name: Joaquin, Tara Leigh | End Date: 05/23/2023

Location: Office | Attending | Referring: [ ]

Client was present | Other Person(s) Present: [ ] | Cancel Reason: Consumer Cancelled (33week)

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

Service Detail

Regenerate Charge | [i] | Save | X

Service Detail | Billing Diagnosis | Authorization(s)

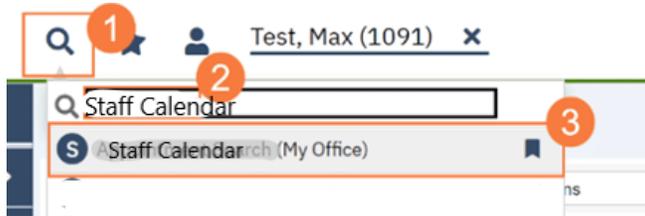
Service

Client: XxTest, Adult M... | Status: Cancel | Start Date: 05/23/2023 | Program: SCA Clinic Med Mgr Adult

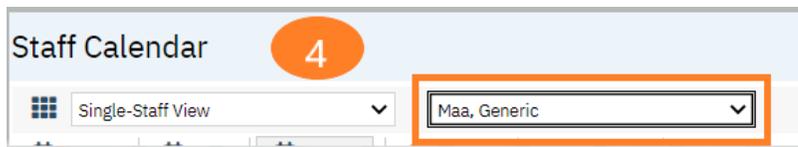
ServiceId: 135  
Created By: testfrontoffice  
Created Date: 05/23/2023 12:18 PM  
Modified By: testfrontoffice  
Modified Date: 05/23/2023 1:20 PM

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

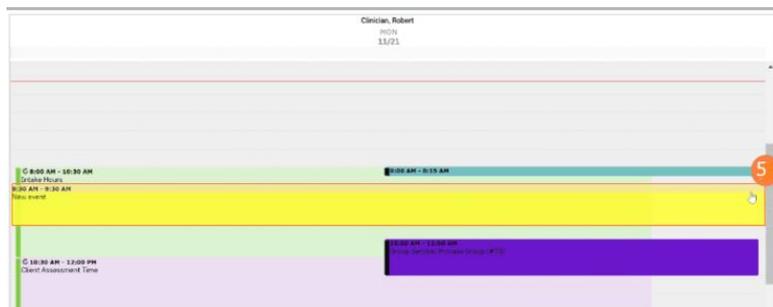
1. Click the Search icon.
2. Type **Staff Calendar** in the search bar.
3. Click to select **Staff Calendar (My Office)**



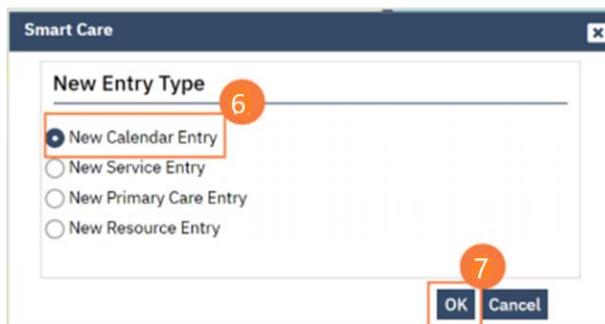
4. Select the staff you want to schedule for.



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 in the Show Time As field and select the correct option.
11. Click OK.

The screenshot shows the "Scheduler Event" window with the following fields and callouts:

- 8:** Subject field containing "CaAIM Training".
- 9:** Appointment Type dropdown menu set to "Unavailable".
- 10:** Show Time As dropdown menu set to "Busy".
- 11:** OK button.

Other visible fields include: Location, Specific Location, Start Time (11/21/2022 09:30 AM), End Time (11/21/2022 10:00 AM), All day Event checkbox, Staff (Clinician, Robert LCSW Licensed Clinica), and Description.

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.



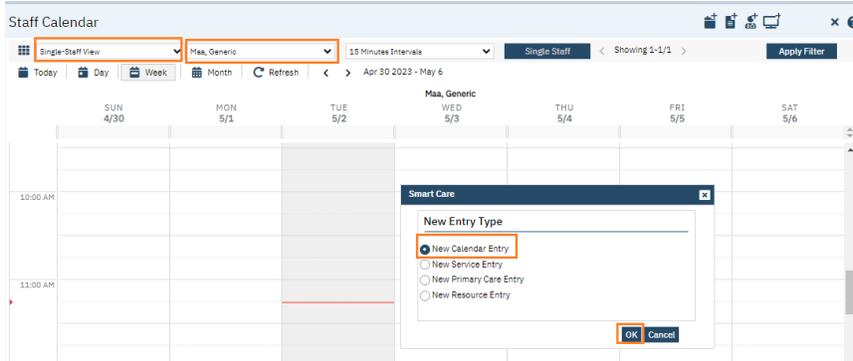
# How to Add Reoccurring Events to Staff Calendar

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.

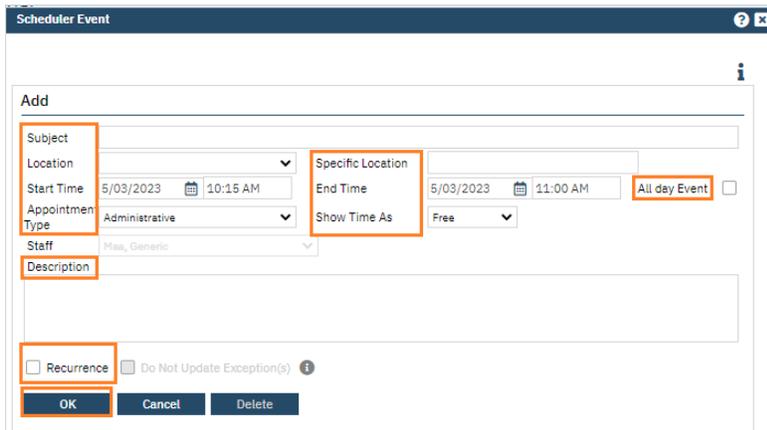
Enter start time and end time information. You can select "all day event" if applicable.

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.)

**Scheduler Event**

**Add**

Subject: Intake

Location: [Dropdown] Specific Location: [Text Box]

Start Time: 5/03/2023 10:00 AM End Time: 05/03/2023 12:00 PM All day Event:

Appointment Type: Intake Show Time As: Free

Staff: Maa, Generic

Description: [Text Area]

Recurrence  Do Not Update Exception(s) *i*

Daily  Every 1 day(s)

Weekly  Every Weekday day(s)

Monthly

Yearly

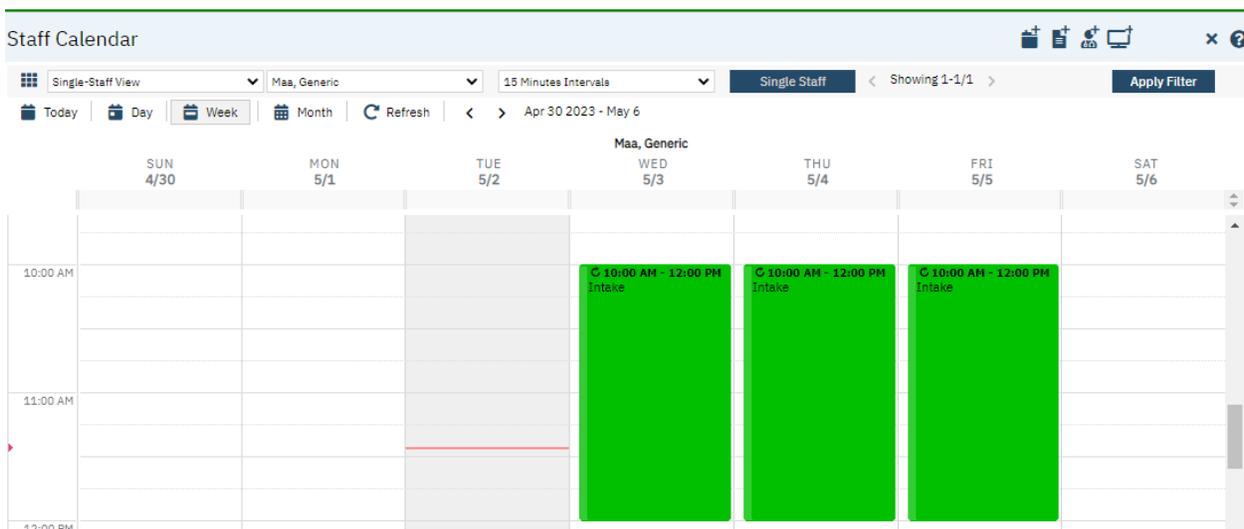
Start: 5/03/2023  No end date

End after 20 occurrences

End by 5/2/2023

OK Cancel Delete

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.

Appointment Search

Plan: Any | Service Area: Any | Programs: Any

Location: Any | Staff: Maa, Generic | License: Any | License Group: Any

Sex: Any | Speciality: Any | Category: Any | Allow Overbooking Up to: | Appointment(s):

Minutes: 15 | From: 8:00 AM | To: 8:00 PM | Any Weekday:  | M:  | T:  | W:  | T:  | F:  | S:  | S:

Only show time slots marked as Free | Appt. Type: Intake | Start Date: 05/02/2023 | Search

Ignore Age Range Preference | Search for Client: Maa, Generic | [Unable to Offer a Timely Appt.](#)

Staff Name	Date/Time	Duration	Type	Location Name
No Appointment(s) Available				

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

Appointment Search (11)

Plan: Any | Service Area: Any | Programs: Any

Location: Any | Staff: Maa, Generic | License: Any | License Group: Any

Sex: Any | Speciality: Any | Category: Any | Allow Overbooking Up to: | Appointment(s):

Minutes: 15 | From: 8:00 AM | To: 8:00 PM | Any Weekday:  | M:  | T:  | W:  | T:  | F:  | S:  | S:

Only show time slots marked as Free | Appt. Type: Intake | Start Date: 05/18/2023 | Search

Ignore Age Range Preference | Search for Client: Maa, Generic | [Unable to Offer a Timely Appt.](#)

	Staff Name	Date/Time	Duration	Type	Location Name
	Maa, Generic	05/03/2023 10:00 AM	120 mins	Intake	
	Maa, Generic	05/04/2023 10:00 AM	120 mins	Intake	
	Maa, Generic	05/05/2023 10:00 AM	120 mins	Intake	
	Maa, Generic	05/08/2023 10:00 AM	120 mins	Intake	
	Maa, Generic	05/09/2023 10:00 AM	120 mins	Intake	
	Maa, Generic	05/10/2023 10:00 AM	120 mins	Intake	
	Maa, Generic	05/11/2023 10:00 AM	120 mins	Intake	
	Maa, Generic	05/12/2023 10:00 AM	120 mins	Intake	
	Maa, Generic	05/15/2023 10:00 AM	120 mins	Intake	
	Maa, Generic	05/16/2023 10:00 AM	120 mins	Intake	
	Maa, Generic	05/17/2023 10:00 AM	120 mins	Intake	

If you would like to schedule, you click A.

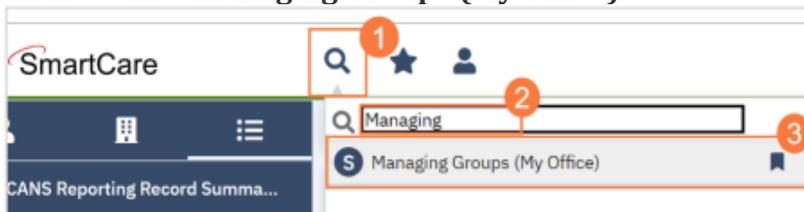
If client declines offered appointment, you click B and select reason from drop-down. (Central Access function tied to timeliness reporting.)

## Appointment Search (11)

	Staff Name	Date/Time	Δ	Duration	Type	Location Name
	Maa, Generic	05/03/2023 10:00 AM		120 mins	Intake	
	Maa, Generic	05/04/2023 10:00 AM		120 mins	Intake	
	Maa, Generic	05/05/2023 10:00 AM		120 mins	Intake	
	Maa, Generic	05/08/2023 10:00 AM		120 mins	Intake	
	Maa, Generic	05/09/2023 10:00 AM		120 mins	Intake	
	Maa, Generic	05/10/2023 10:00 AM		120 mins	Intake	
	Maa, Generic	05/11/2023 10:00 AM		120 mins	Intake	
	Maa, Generic	05/12/2023 10:00 AM		120 mins	Intake	
	Maa, Generic	05/15/2023 10:00 AM		120 mins	Intake	
	Maa, Generic	05/16/2023 10:00 AM		120 mins	Intake	
	Maa, Generic	05/17/2023 10:00 AM		120 mins	Intake	

## 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.

Group	Δ	Program	Location	Procedure	Staff 1	Staff 2	Staff 3	Staff 4	Attendance
123		Outpatient MH A...	Community Menta...	Group Psychothe...	Stephan, K...				No
cb7881testdyto...		Access Unit	Ambulance - AL...	Alcohol and/or...	Zunjarwad...				No
Managing Stress		Outpatient MH A...	Community Menta...	Group Psychothe...	Clinician...				No
Process Group		Outpatient MH A...	Community Menta...	Group Psychothe...	Clinician...	Vencill, K...			No
Recovery Test G...		Contract Outpat...	Community Menta...	Group Psychothe...	Clinician...	Dominik, B...			No

5. Enter all group details in the General Tab.

Group Details

General Schedule

General

Group ID  Active

Group Name Recovery Test Group

Display As Recovery Test Group

Type

Group Note Group Progress Note

Classroom

Mode of Delivery Face-to-face

Max. # of Client(s)

Medicare G Code

Defaults

Location Community Mental Health Center

Program Contract Outpatient MH Adult

Procedure Code Group Psychotherapy (Other Than of a Multiple-Famil)

Duration 90 Minutes

Start Time 9:00 AM

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

Clients  Automatically add clients from roster to new group service

Clients which may attend this group.

Client Name

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.

Client Search

Clear

**Name Search**  Include Client Contacts  Only Include Active Clients (Checking will not allow option to create new Client)

Broad Search Narrow Search Type of Client  Individual  Organization 7

Last Name Test First Name Program

**Other Search Strategies**

SSN Search a Phone # Search

DOB Search Master Client ID Search

Primary Clinician Search Client ID Search

Authorization ID / # Insured ID Search

**Records Found**

ID	Master ID	Client Name	SSN/EIN	DOB	Status	City	Primary Clinician
8 15	1015	Tesla, Jim	0000	01/01/1980	Active	Sacramento	
1091	1091	Test, Max	6345	01/01/1990	Active	Middle	Rapp, Chris
1080	1080	TestCH, Client	9999	01/20/2011	Active		

9 10

Select Select & Close Cancel

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

Group Details

General Schedule

Type

Group Note Group Progress Note

Classroom

Max.# of Client(s)

Medicare G Code

Comment

Program Outpatient MH Adult

Procedure Code Group Psychotherapy (Other Than of a Multiple-Famil

Duration 60.00 Minutes

Start Time 3:00 PM

**Attendance**

Attendance Schedule...

Group Note Type

Add all clients enrolled in Program

Default Procedure Set Client Specific Default...

**Clients**  Automatically add clients from roster to new group service

Clients which may attend this group. Add Clients...

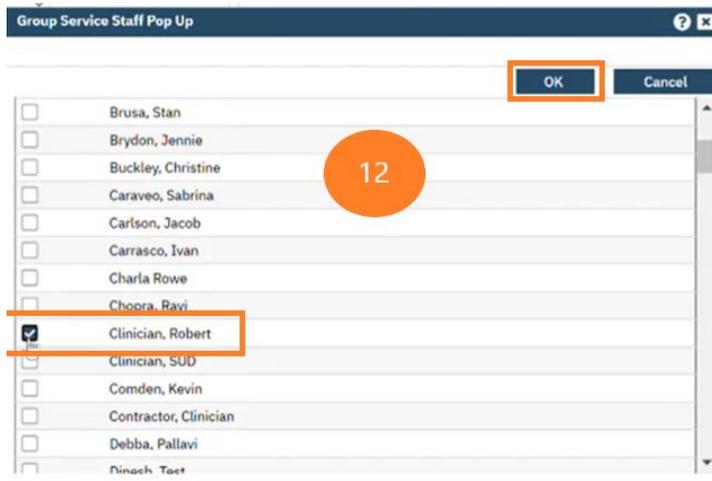
Client name
X Asano, Jason
X Bravo, Johnny
X Powers, Light
X Thompson, Toby
X White, Walter
X Williams, Kyle

**Staff** 11

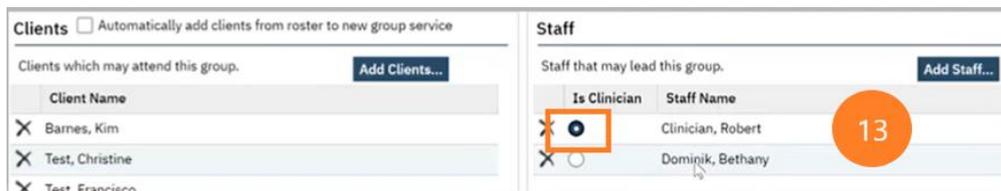
Staff that may lead this group. Add Staff...

Is Clinician	Staff Name
X <input checked="" type="radio"/>	Clinician, Robert
X <input type="radio"/>	Supervisor, Clinician

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



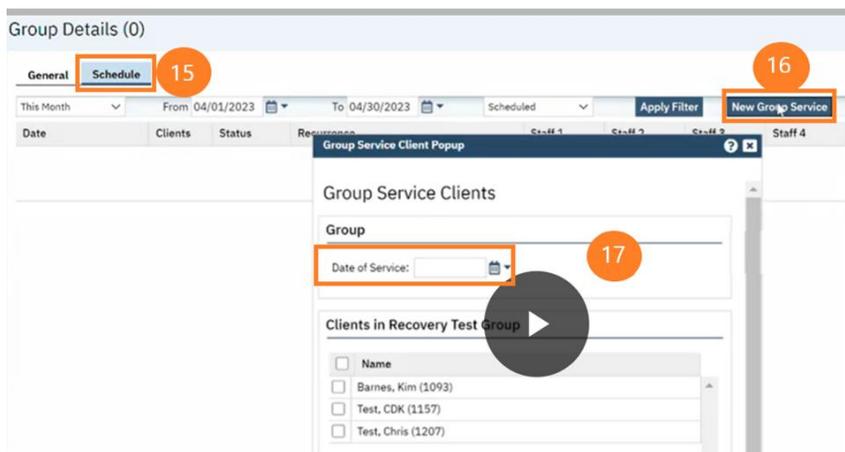
13. Designate lead staff member of group by clicking radial button next to staff member's name.



14. Click Save.

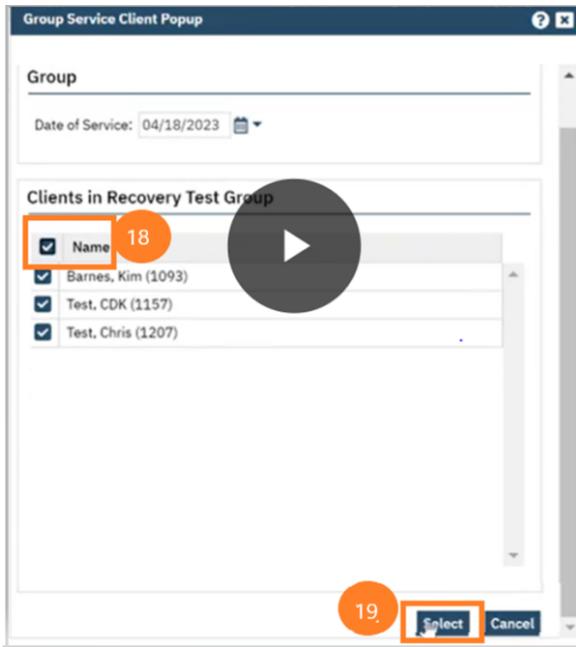


- 15. Go to the Schedule tab.
- 16. Click New Group Services.
- 17. Enter date of service.



18. Select clients.

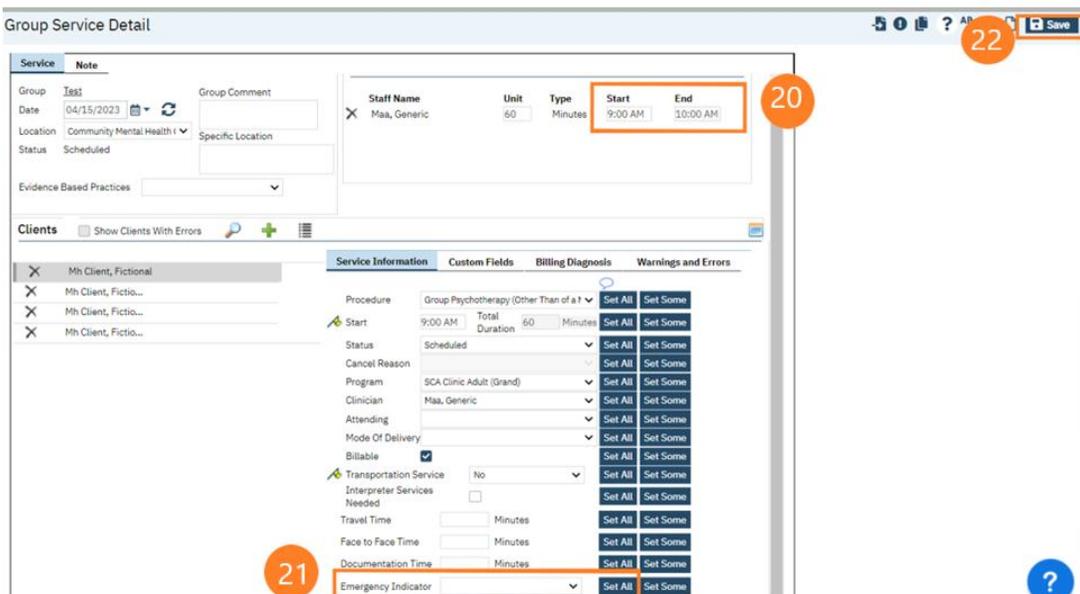
19. Click Select.



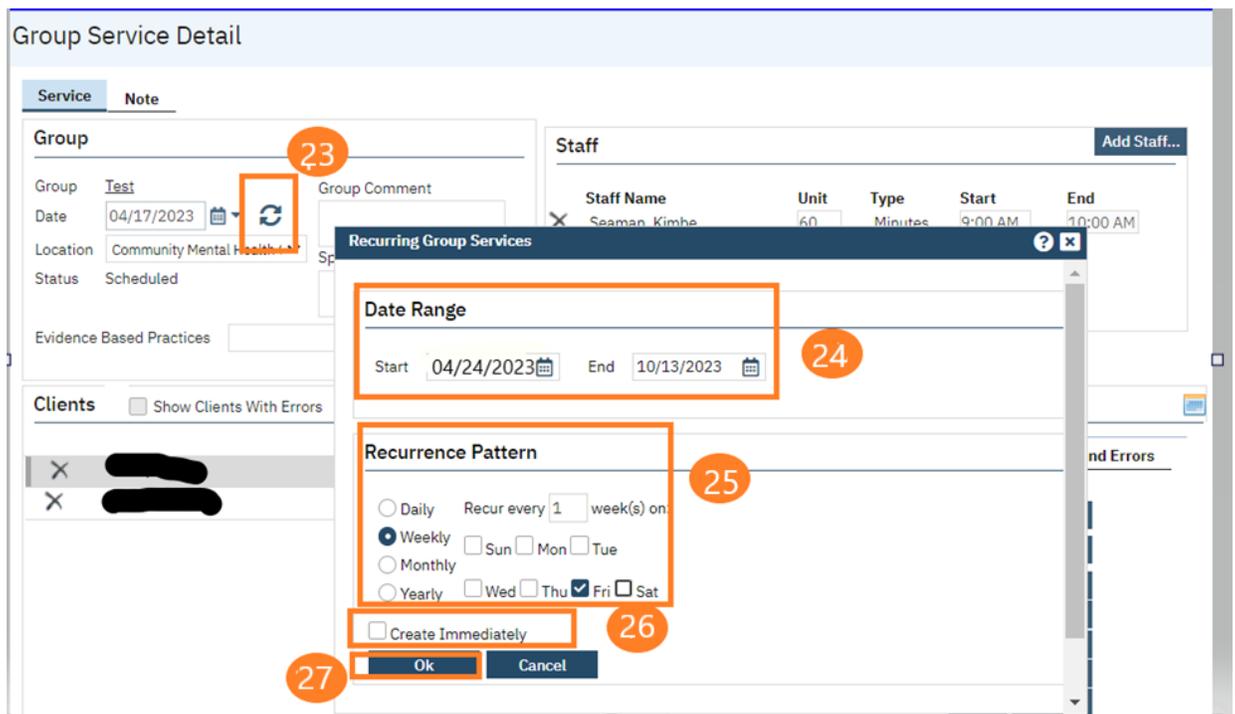
20. Enter start and end time for staff.

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.**



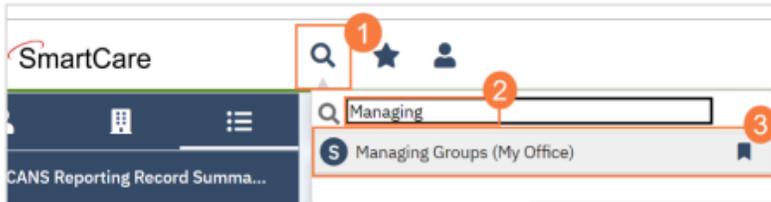
23. To make group re-occurring, click make reoccurring icon.
24. Enter start date and end date. (Start date needs to be the next group date since the first group is already on staff's calendar as a single event.)
25. Specify recurrence pattern.
26. Only check the create immediately button if this will 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.



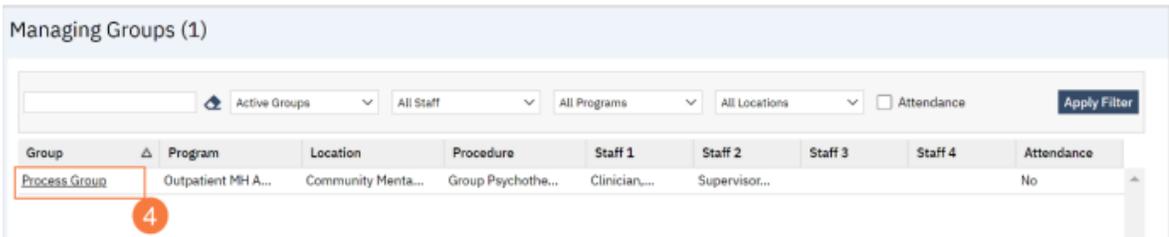
28. Click the X icon to close the screen.

## How to Add a Client to a Group

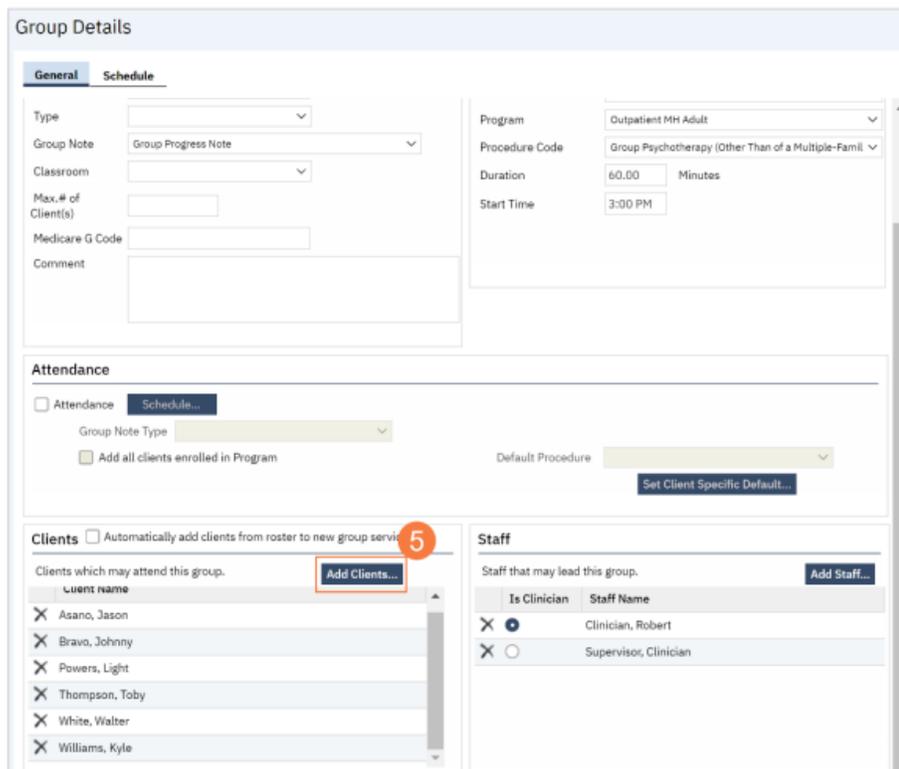
1. Click the Search icon.
2. Type **Managing** into the search bar. Note: you can also type **Group** and get the same result.
3. Click to select **Managing Groups (My Office)**.



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.

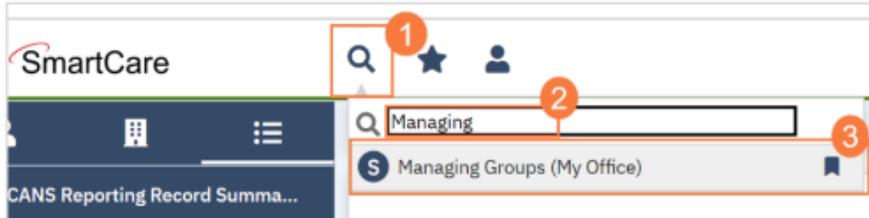


6. The Client Search window will open, click in the Last Name and First Name fields to enter the corresponding information. Select Enter on your Keyboard to populate search results.
  - a. You can also use the Other Search Strategies fields to search by SSN, DOB, etc.
7. Click the radio button to the left of the client you want to select.
8. Click Select and Close. This client will be added to the group.

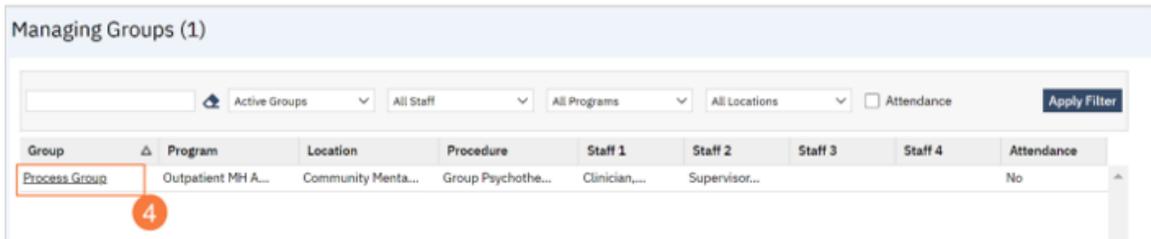
9. Click Save. Click the X to close the screen.

## 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.

Group Details

**General** | Schedule

Type:   
Group Note: Group Progress Note  
Classroom:   
Mode of Delivery: Face-to-face  
Max. # of Client(s):   
Medicare G Code:   
Comment:

Program: SCA Clinic Adult (Grand)  
Procedure Code: Group Psychotherapy (Other Than of a Multiple-Famil)  
Duration: 60.00 Minutes  
Start Time: 9:00 AM

**Attendance**

Attendance [Schedule...](#)  
Group Note Type:   
 Add all clients enrolled in Program  
Default Procedure:  [Set Client Specific Default...](#)

**Clients**  Automatically add clients from roster to new group service

Clients which may attend this group. [Add Clients...](#)

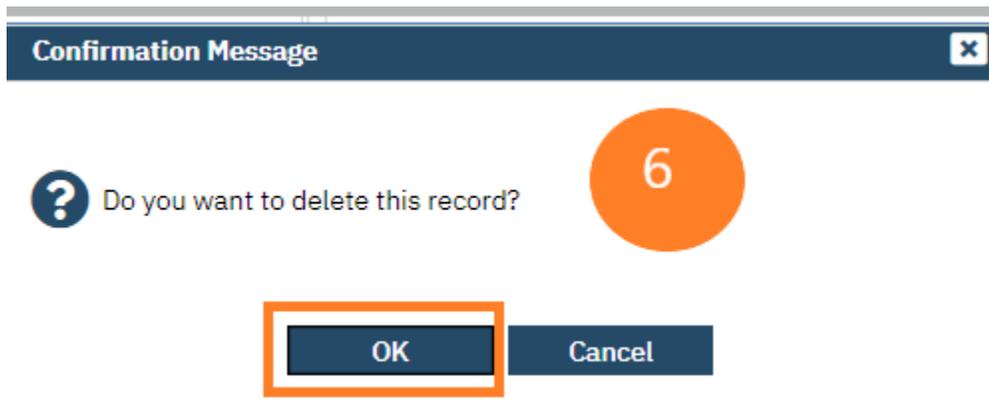
Client Name
<input checked="" type="checkbox"/> Mh Client, Fictional 05
<input checked="" type="checkbox"/> Mh Client, Fictional 04
<input checked="" type="checkbox"/> Mh Client, Fictional
<input checked="" type="checkbox"/> Mh Client, Fictional 06

**Staff**

Staff that may lead this group. [Add Staff...](#)

Is Clinician	Staff Name
<input checked="" type="checkbox"/>	Maa, Generic

6. A confirmation window will open. Click OK.

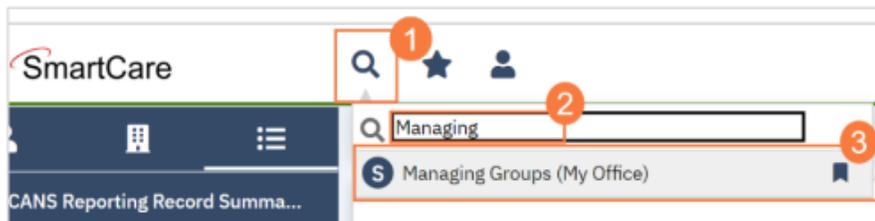


7. Click Save and X to close.

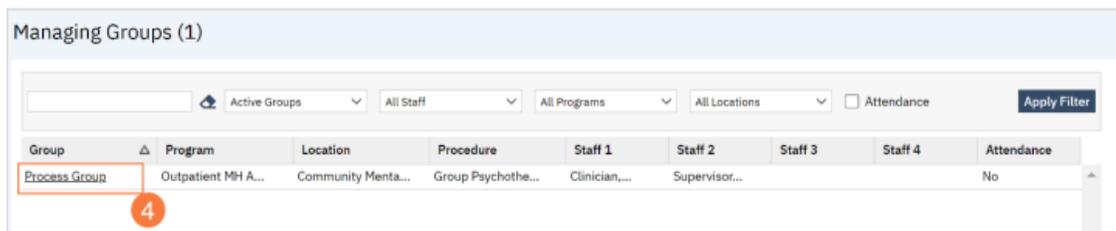


## How to Add or Change a Staff Member in a Group

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.

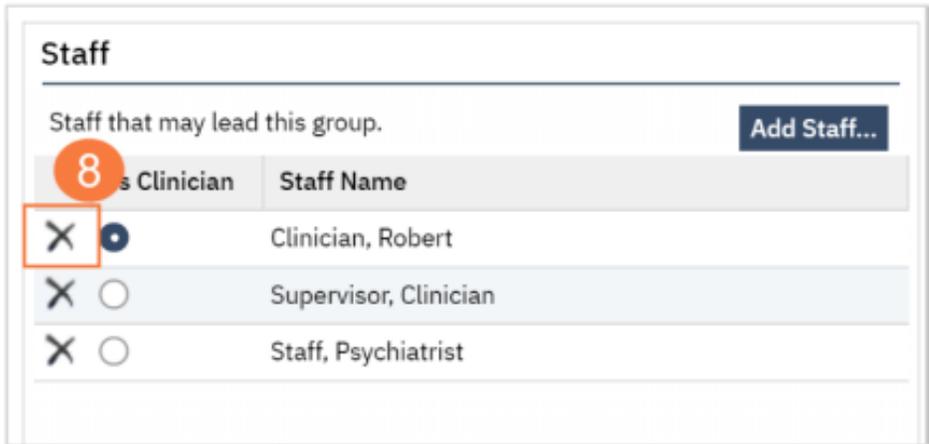
The screenshot shows the 'Group Details' interface. At the top, there are tabs for 'General' and 'Schedule'. Below these are various input fields for group information. The 'Attendance' section includes checkboxes for 'Attendance' and 'Add all clients enrolled in Program'. The 'Clients' section has a list of names with 'X' icons. The 'Staff' section, highlighted with a red circle '5', contains a table with columns 'Is Clinician' and 'Staff Name'. It lists 'Clinician, Robert' and 'Supervisor, Clinician', with an 'Add Staff...' button highlighted by a red box.

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

7. Click OK.

The screenshot shows a 'Group Service Staff Pop Up' dialog box. It has a title bar with a question mark and close button. At the top right, there are 'OK' and 'Cancel' buttons, with the 'OK' button highlighted by a red box and a red circle '7'. Below the buttons is a list of staff roles with checkboxes. The 'Staff, Psychiatrist' row is highlighted by a red box and a red circle '6', and its checkbox is checked. Other roles include 'Staff, Access', 'Staff, Billing', 'Staff, Clerical', 'Staff, Compliance', 'Staff, Nurse', 'Stephan, Khristy', and 'Sullivan, Kevin'.

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

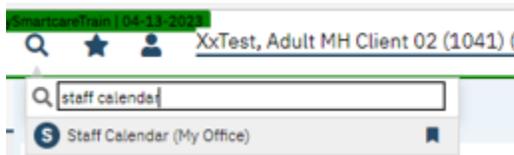


- Click Save. Click the X to close the screen.

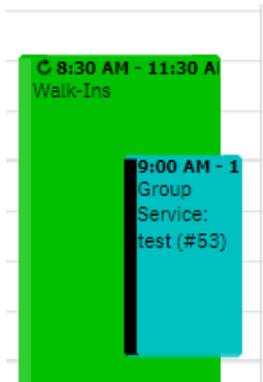


### If staff is out sick and someone else will be facilitating group for the day

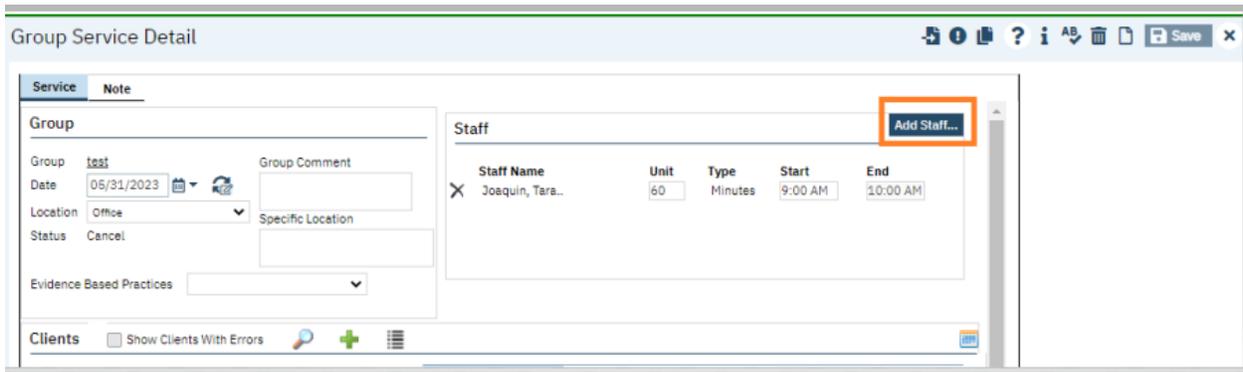
- Search **Staff Calendar**. Select **Staff Calendar (My Office)**.



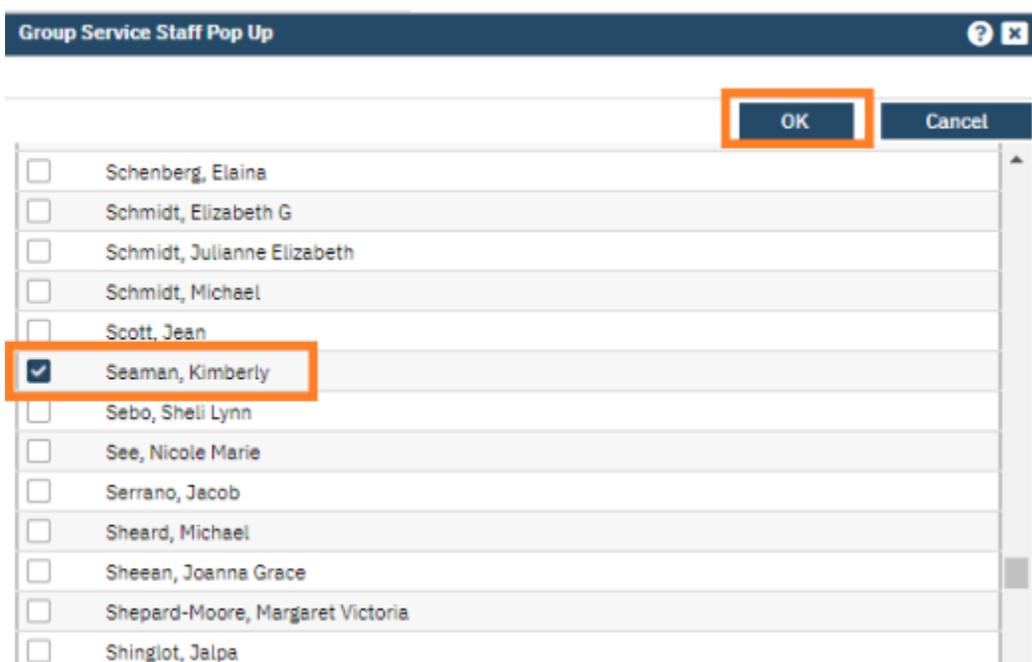
- Locate the group service and double click to open.



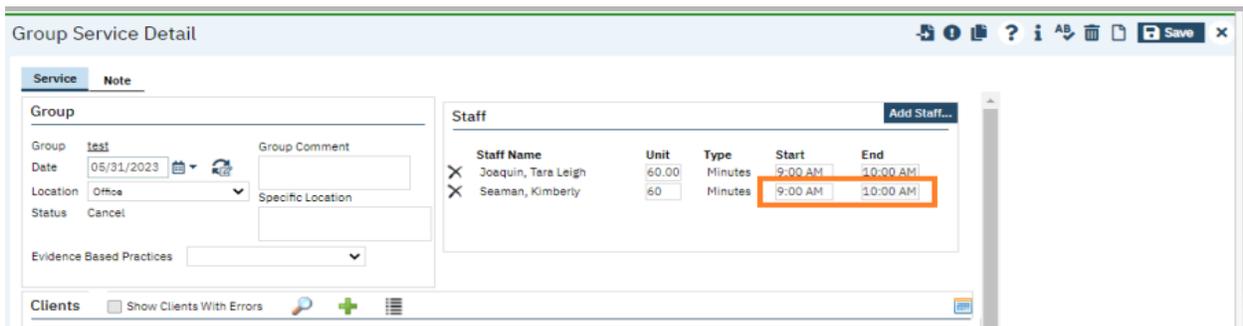
3. Click the Add Staff button.



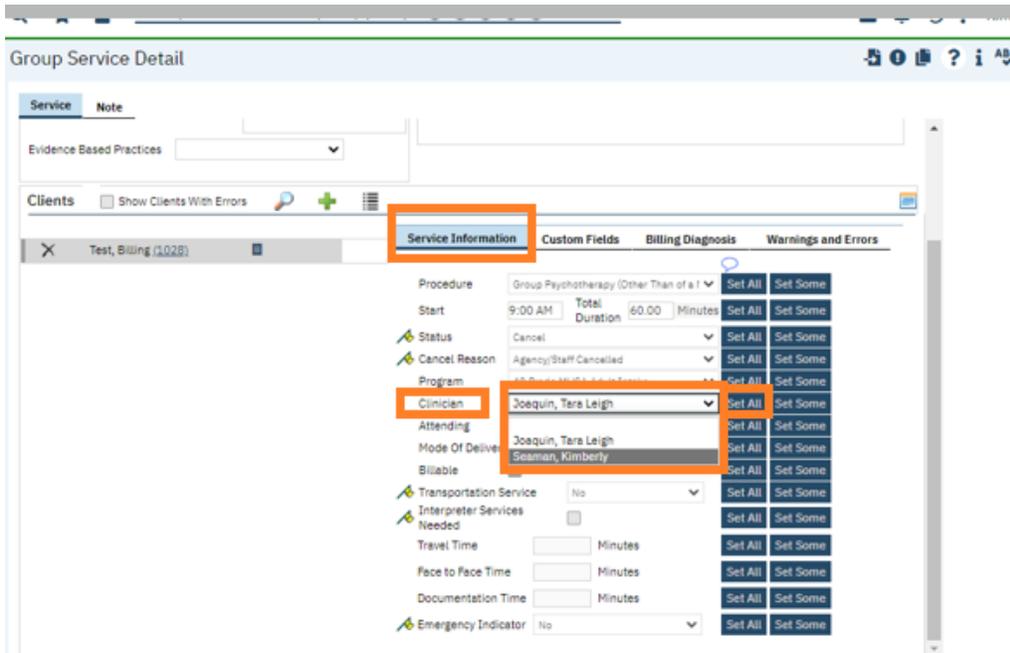
4. Select the staff from the drop-down menu and click OK.



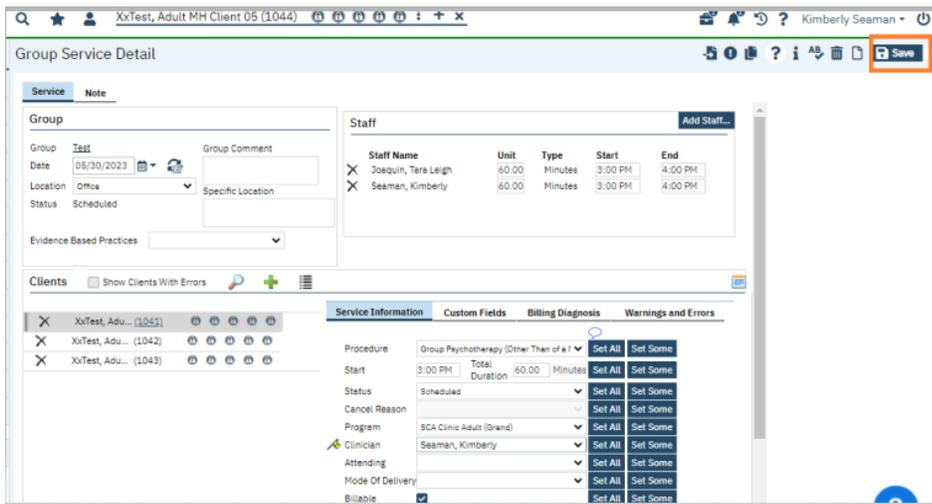
5. Enter in start time for newly added staff.



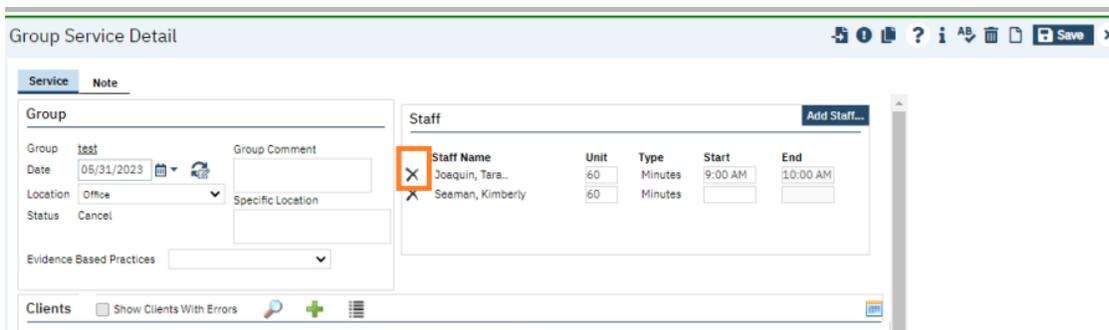
6. In the Service Information tab, change the clinician and click Set All.



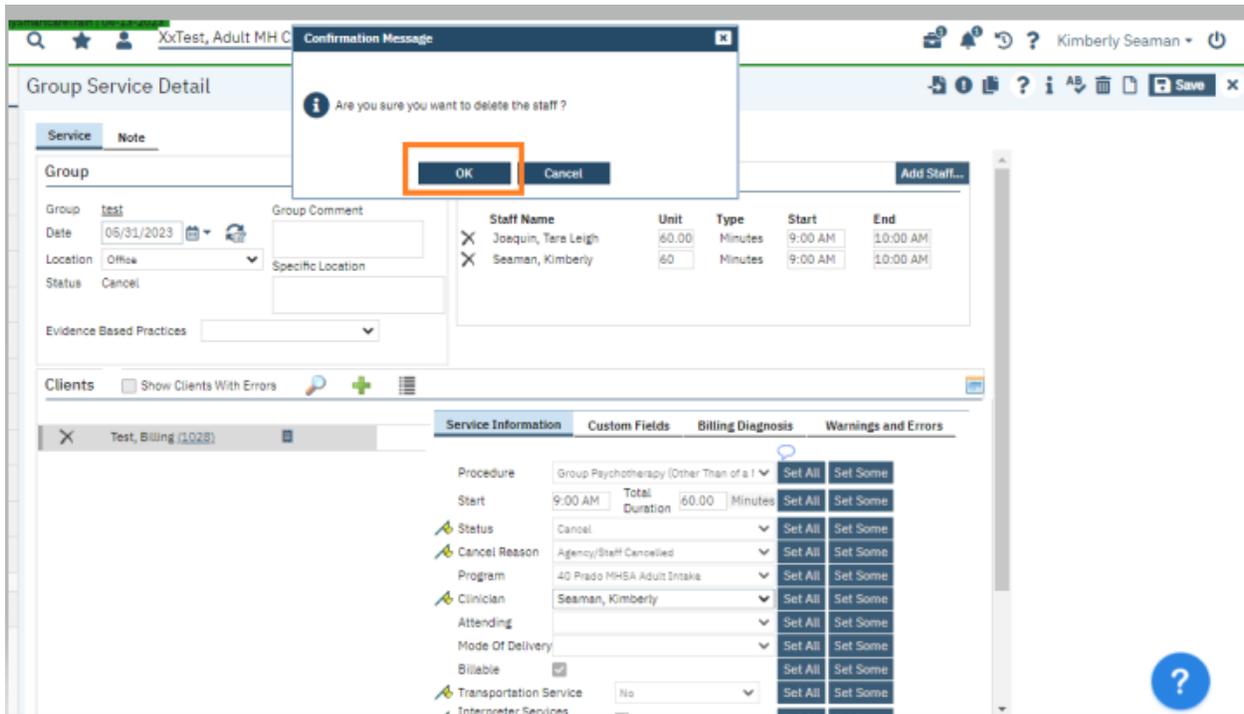
7. Click Save.



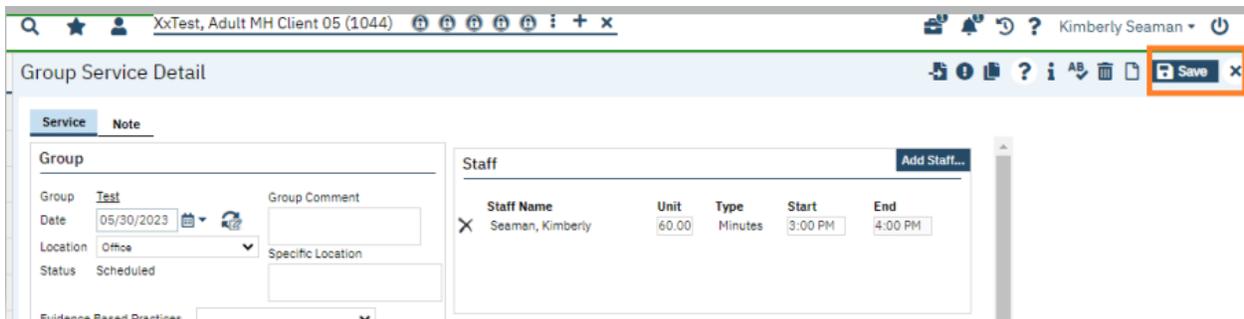
8. Click the X next to the staff you are removing from that day's group.



9. Click OK.

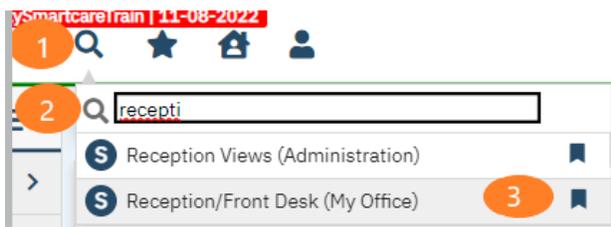


10. Click Save and X to Close.

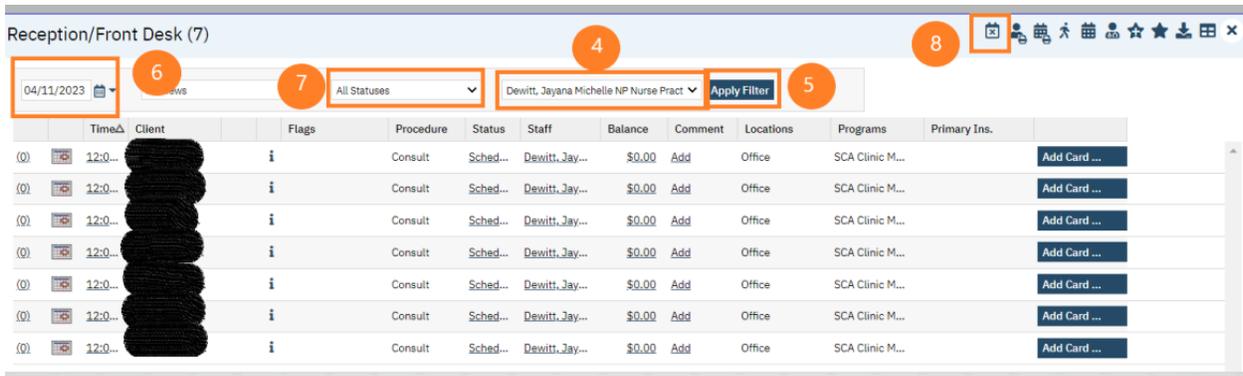


## How to Cancel an Entire Day of Appointments

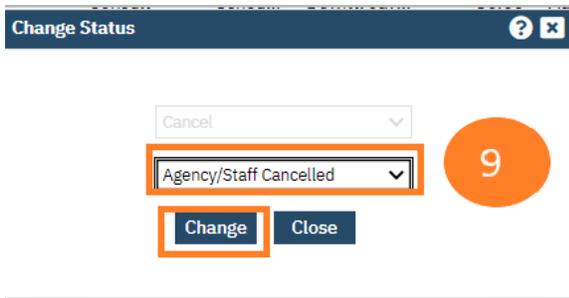
1. Click the Search icon.
2. Type **Reception** in the search bar.
3. Click to select **Reception-Front Desk (My Office)**



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.

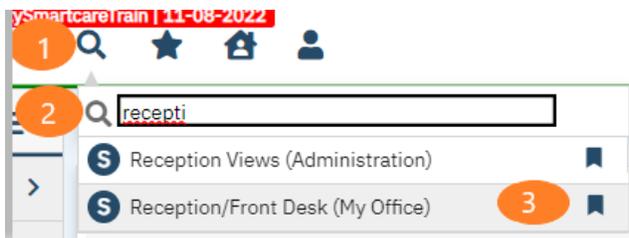


9. A window opens asking for cancellation reason. Select appropriate reason and click Change.

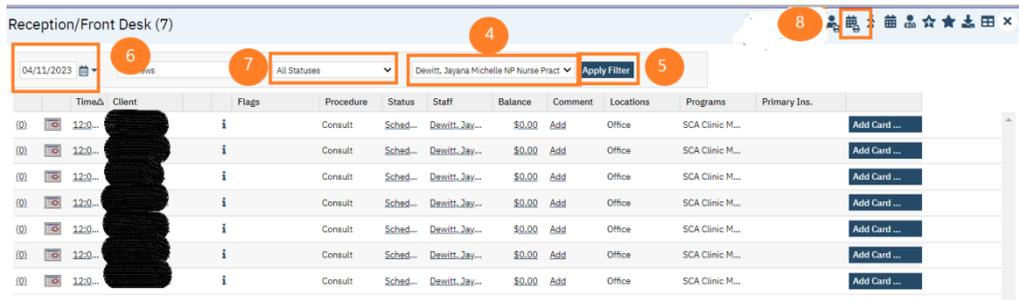


## How to Print a Daily Schedule

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.

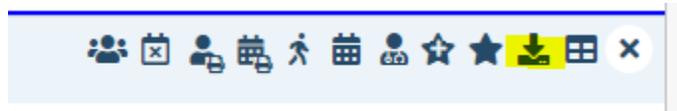


## How to Print a Daily Schedule that includes comments, phone #s, insurance info, etc.

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.

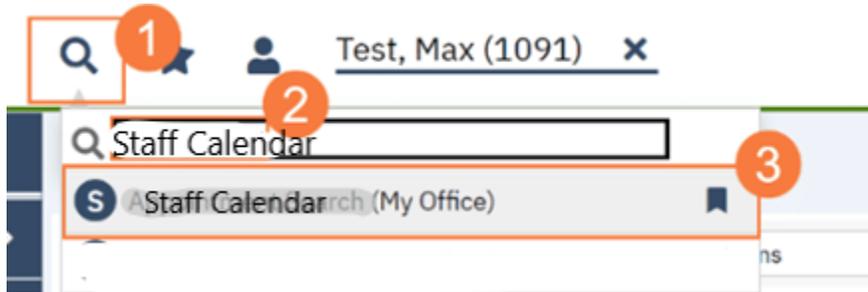
Reminders:

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

Phone	Home
Number	Mobile
	Mobile 2

## 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)**



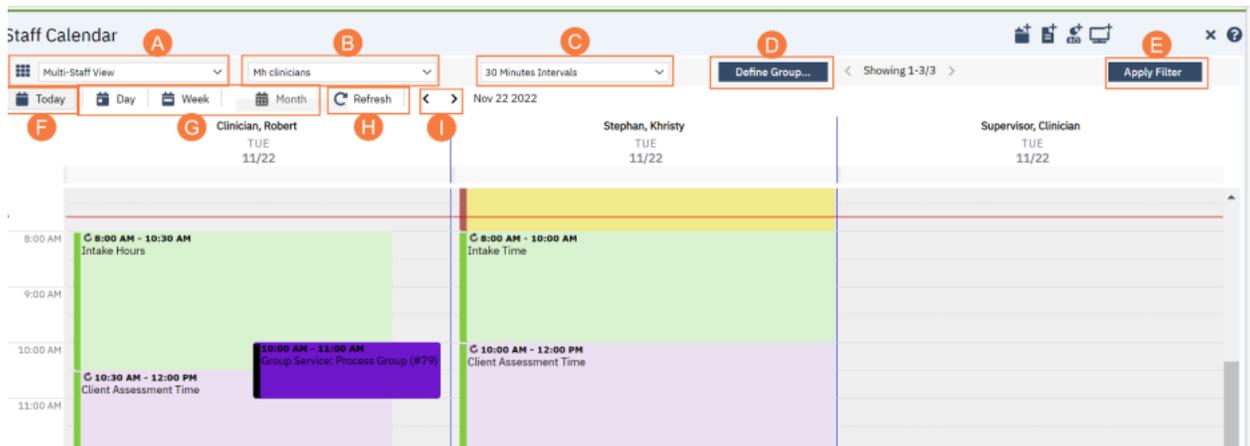
4. Select Single Day View; Select Provider to View; Click Apply Filter (A & E)

OR

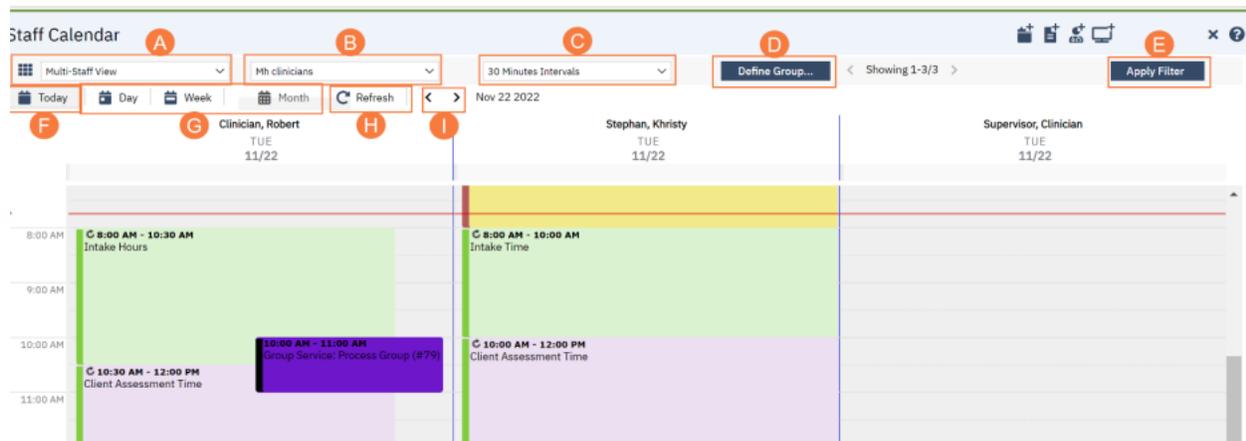
5. Select Multi-Day View; Select group you have access to view; Click Apply Filter (A, B & E)

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)



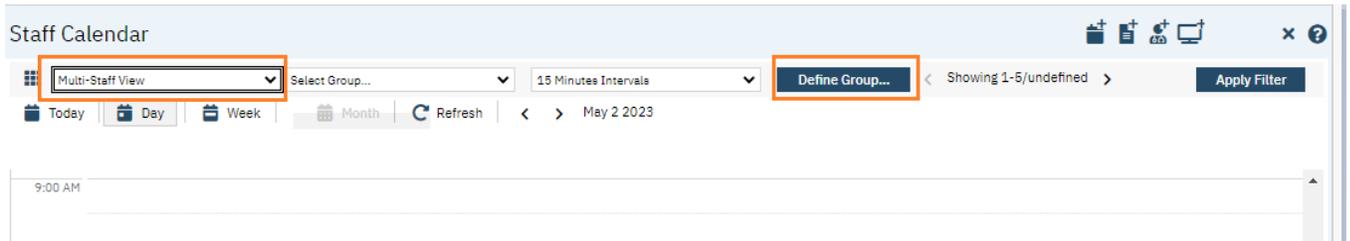
- A. The View drop-down menu will allow you to switch between calendar views of a single-staff, multiple-staff members based on a pre-defined group, or multiple-staff members that you can select.
- B. In the multiple-staff view, this will allow you to choose between pre-defined groups. In single-staff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



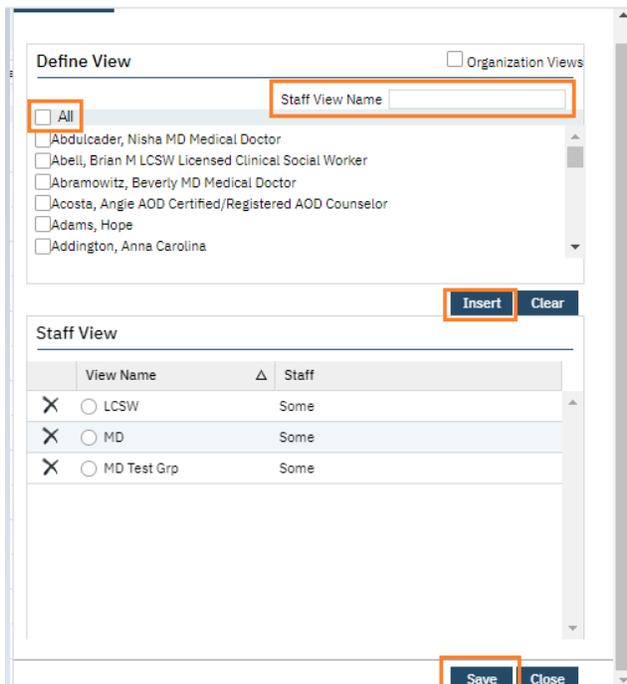
Uncheck All.

Select Staff.

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

Click Insert.

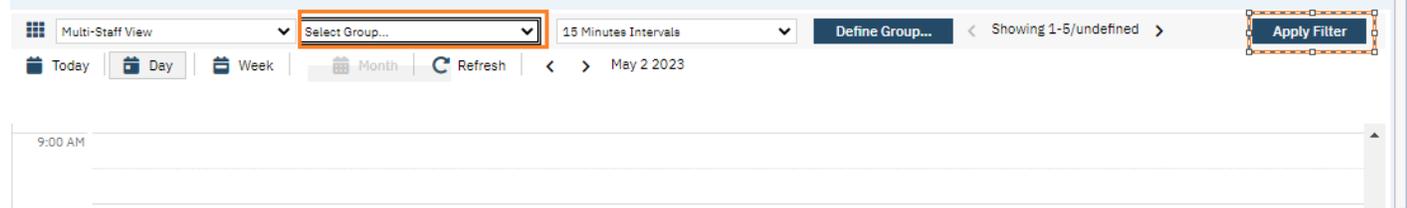
Scroll down and click Save and Close.



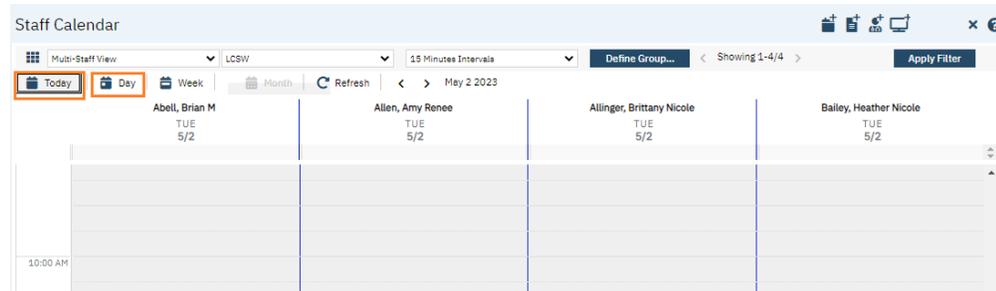
To view the group, click the drop down in Select Group field.

Click Apply Filter.

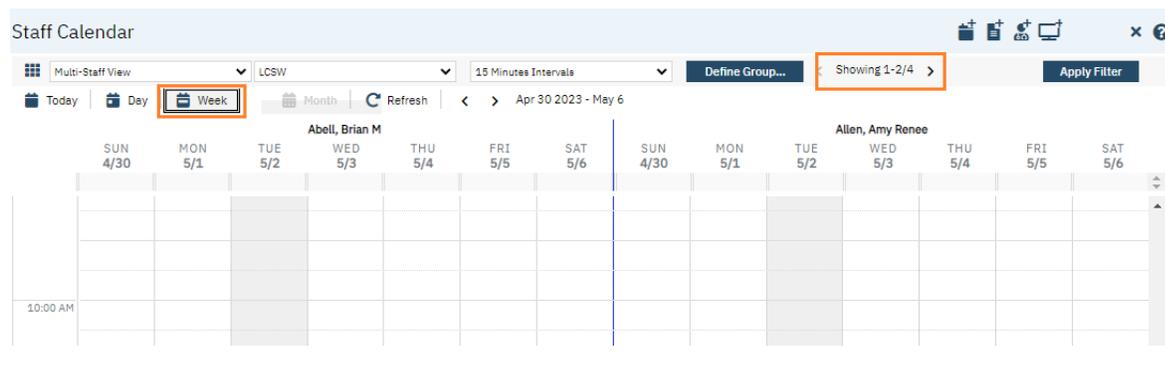
## Staff Calendar



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

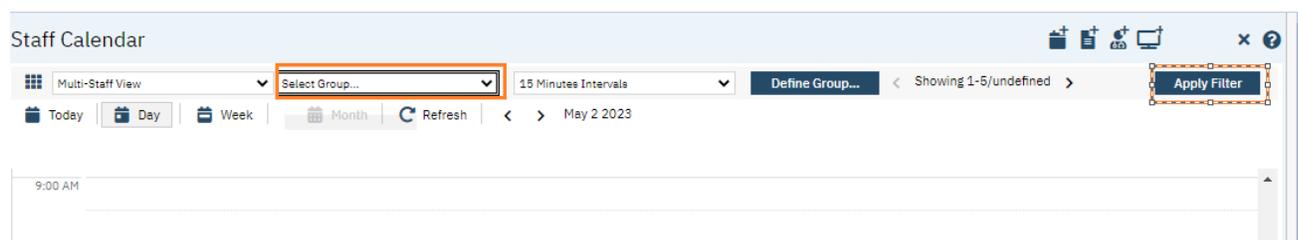


To navigate by week, click the <Showing> button.



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.

**Define View**  Organization Views

Staff View Name LCSW

- All
- Abdulkader, Nisha MD Medical Doctor
- Abell, Brian M LCSW Licensed Clinical Social Worker
- Abramowitz, Beverly MD Medical Doctor
- Acosta, Angie AOD Certified/Registered AOD Counselor
- Adams, Hope
- Addington, Anna Carolina

**Update** **Clear**

**Staff View**

View Name	Staff
<input checked="" type="radio"/> LCSW	Some
<input type="radio"/> MD Test Grp	Some

**Save** **Close**