MENTAL HEALTH MIS

SCHEDULER

County of San Diego
Behavioral Health Services

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<u>CONFIDENTIALITY</u>

HIPAA regulations mandate that <u>all</u> client information be treated confidentially.

Access to CCBH is based on your position and your job classification. You will have the access you need to complete your job duties. This can include access to clients in your Unit/SubUnit or may include full client look up. Remember – with more access comes greater responsibility regarding confidentiality!

You are <u>not</u> to share passwords with other staff. The Summary of Policy you signed before receiving your access to CCBH included your agreement to this directive. You are still responsible if someone with whom you have shared your password violates confidentiality!

The MIS unit investigates any suspicions regarding sharing of passwords. Consequences are up to, and may include termination.

Do not open any active client charts unless instructed to do so, or if it is required to complete your job duties. "Surfing" clients is a blatant breach of confidentiality.

Remember you are personally and legally responsible for maintaining confidentiality. Take it seriously.

Do not leave your computer unlocked with client data on the screen for others to access or view while you are away from your desk. Lock your CCBH session before leaving your computer.

When printing, make sure you are printing to a confidential printer, and pick up your paperwork quickly. Leaving printed Protected Health Information (PHI) out is also a confidentiality violation.

Play it safe – keep in mind how you would want your own PHI handled!

Accessing the External View Via the Clinician's Homepage

If you will be working outside of the Clinician's Homepage (for client assignments, service entry, scheduler, reports, etc.), click on the File Tab, click "Menu", and click your desired menu and submenu(s).
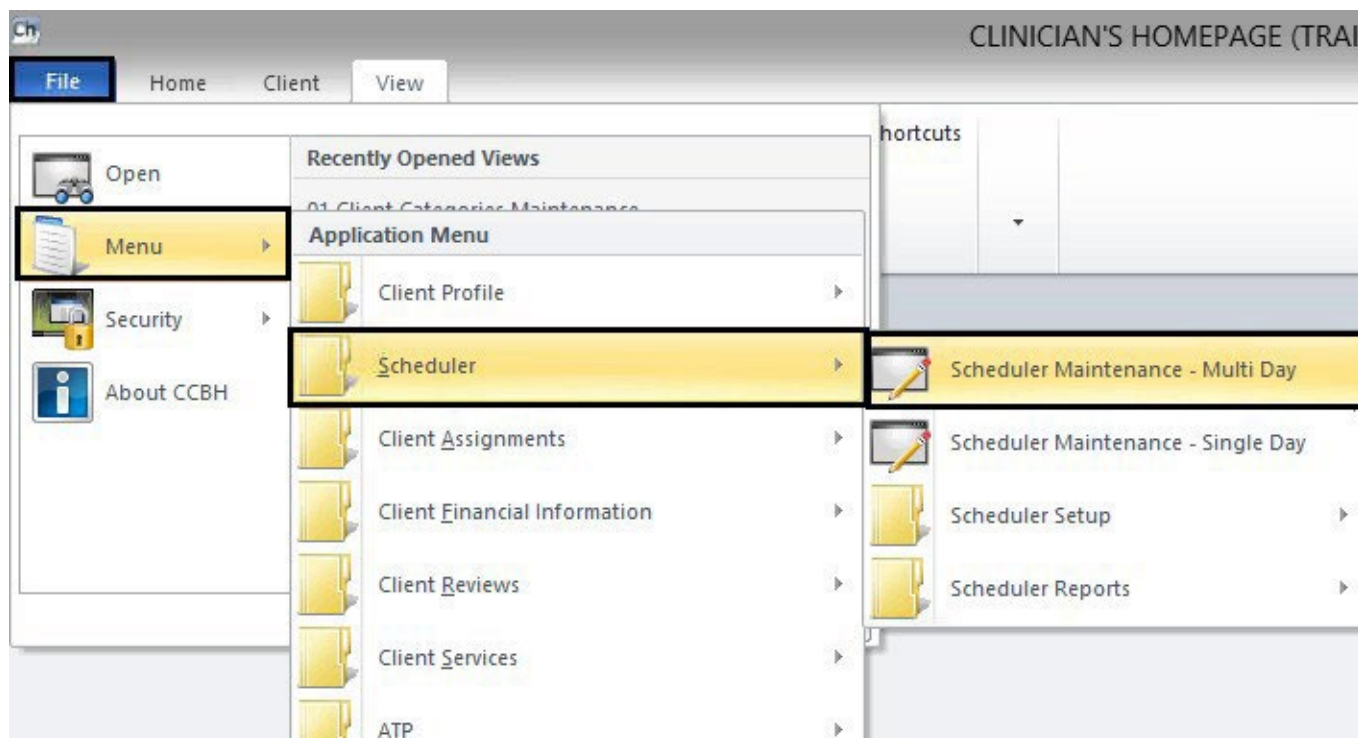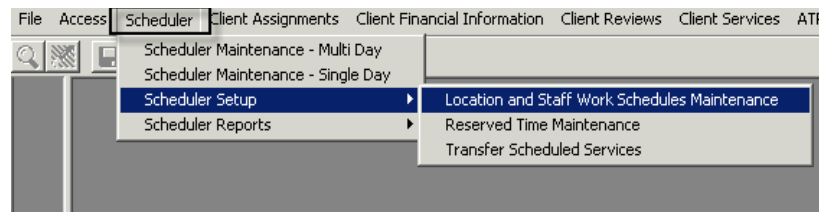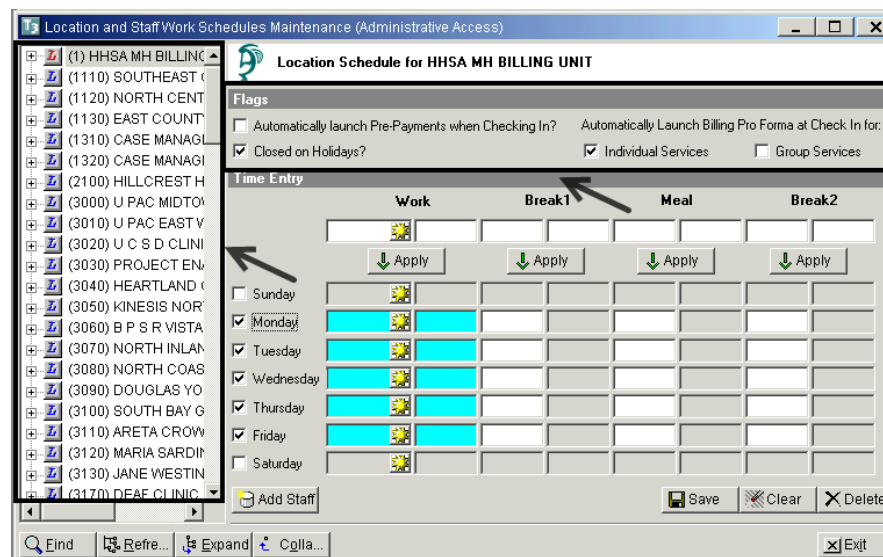
LOCATION AND STAFF WORK SCHEDULES MAINTENANCE

Program Managers and/or Administrative Staff will be responsible for maintaining the "Location and Staff Work Schedules Maintenance" for their own program(s).

To access:

- Click on "Scheduler"
- Click on "Scheduler Setup"
- Click on "Location and Staff Work Schedules Maintenance"

- The "Location and Staff Work Schedules Maintenance" screen appears.

    1. On the left side of the screen, programs are listed vertically by unit. Click on your program. *NOTE: You may need to scroll down to find it*

    2. In the " Flags" section, check the "Closed on Holidays" box if your program is closed on New Year's, Memorial Day, 4th of July, Labor Day, Thanksgiving, and Christmas. Do not check off any other boxes

Time Entry

1. Enter the program's business hours. Use an "A" for AM and a "P" for PM.
2. For each day the program is open, check the corresponding box
3. Click "Apply"
4. Click "Save"

1. Click on the "plus sign" to the left of your program to view staff who have been set up.
2. To add an additional staff member, click "Add Staff

1. Locate the additional staff member from the table, and check the corresponding box
2. Click "Add"
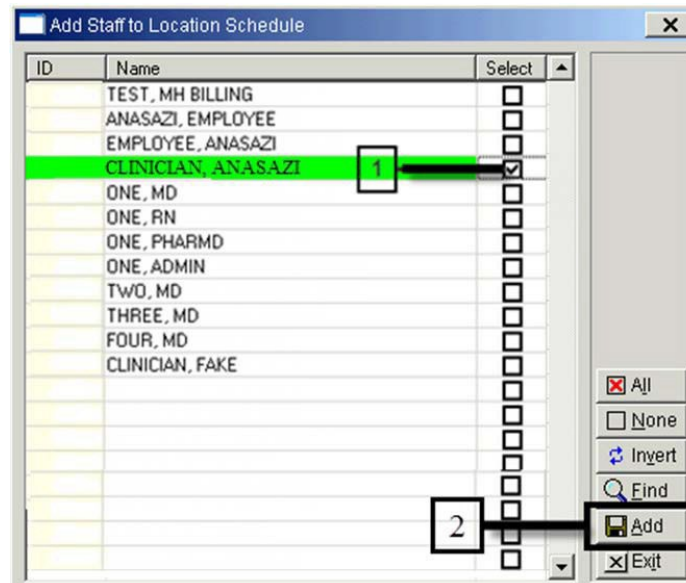
SCHEDULE TYPE

1. To set up a specific staff member's schedule, click on his/her name
2. Click on the down arrow to the right of the "Schedule Type"
3. Choose the appropriate "Schedule Type" from the table

L- Same as Location- Staff works the same days and hours that the program is open

R- Rotating- Not used in the County of San Diego

S- Shift- Not used in the County of San Diego

W- Weekly- Staff normally works the same schedule every week

By choosing "Weekly", specific break and meal times can be entered for the individual staff member. This is done the same way "**Time Entry**" was explained in the Location and Staff Work Schedules Maintenance section. *NOTE: Be sure to "Save" when finished*
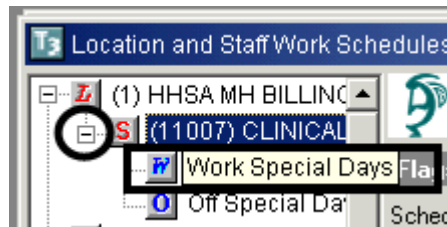
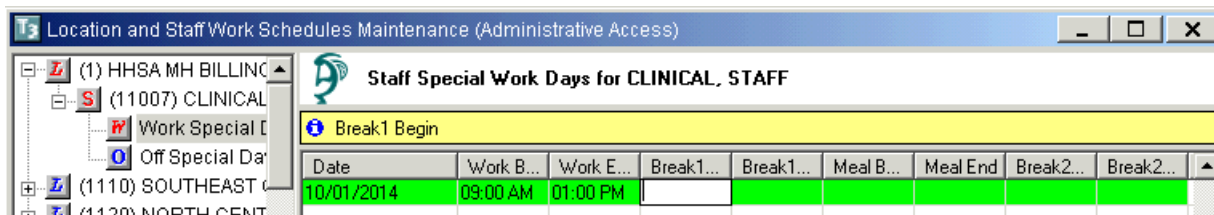# WORK SPECIAL DAYS

Work Special Days is used to identify the days when a staff person is working in addition to his/her normal work schedule.

1. Click on the "plus sign" to the left of the staff member
2. Click on the "W" for "Work Special Days"

- Click in the "Date" cell to enter the date. Use the tab key on the keyboard to move from cell to cell and enter the "Work Begin" and "Work End" times, as well as the meal and break times (if applicable)

- All information is saved once you successfully tab to the next row

OFF SPECIAL DAYS

Off Special Days is used to identify the days when a staff person is not working during his/her normal work schedule.

1. Click on the "plus sign" to the left of the staff member
2. Click on the "O" for "Off Special Days"
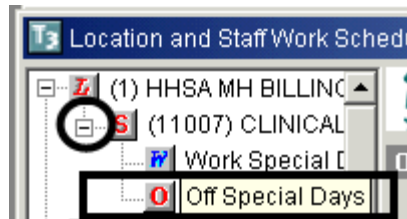


- Enter the appropriate dates, the description, and "Save"

MULTI DAY VIEW

The Multi-Day View allows the user to enter appointments on behalf of an individual staff and to view one staff person's daily, weekly, monthly or multi-day schedule. Client services may also be entered and viewed in the Multi-Day View.

To access:
- Click on "Scheduler"
- Click on "Scheduler Maintenance – Multi Day"
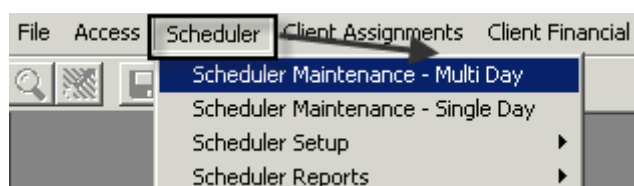
The Multi-Day screen displays.

- "Entity Type" will default to Staff
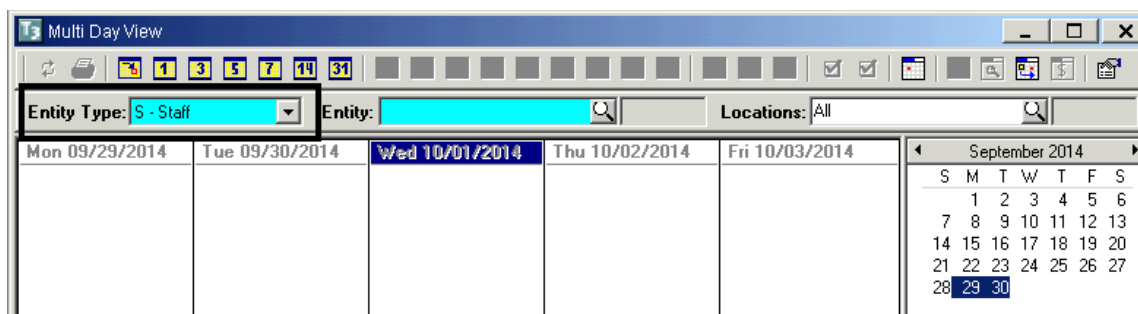
To view a schedule

1. Enter the CCBH ID number in the "Entity" field and press the tab key on the keyboard. NOTE: If you wish to schedule for a client instead of staff, change the "Entity Type" to "Client", and enter a client case number in the "Entity" field
2. Leave the "Location" field on "All"
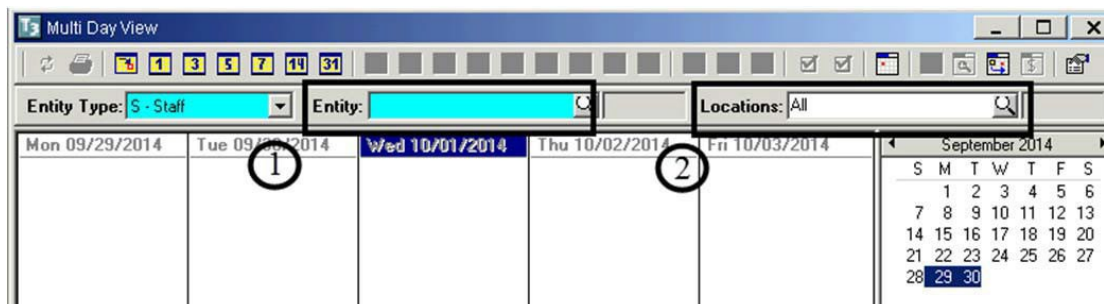
Adjusting the Calendar

- Click on the yellow icons to "Go to Today", or to see a "One Day View", "Three Day View", etc.
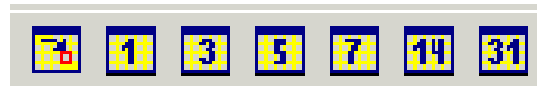
- On the small calendar on the right, click and drag from your starting date to your ending date. The larger calendar on the left will change accordingly. The left and right arrows take you from month to month
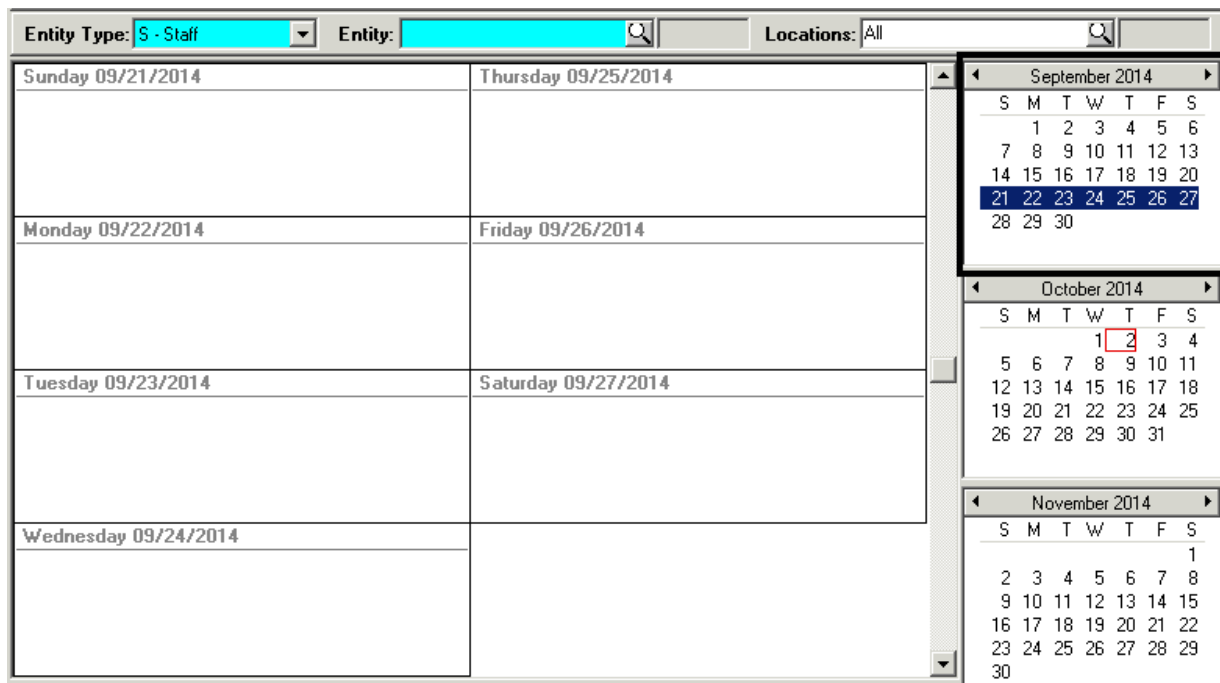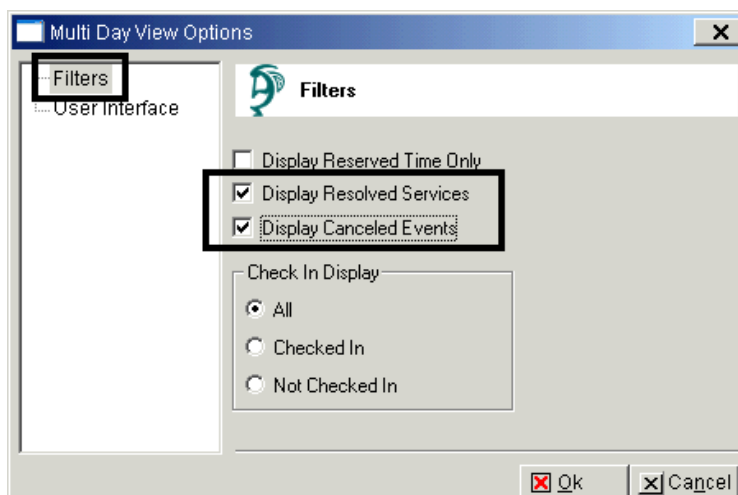
VIEW OPTIONS

- Click on the below icon to access the "View Options"

- Under "Filters", check the boxes for "Display Resolved Services" and "Display Cancelled Events". This ensures that resolved and cancelled events remain on the calendar instead of disappearing

- Under "User Interface", choose your preferred icon size. Small icons are used throughout the screenshots in this resource packet
- Click "OK"

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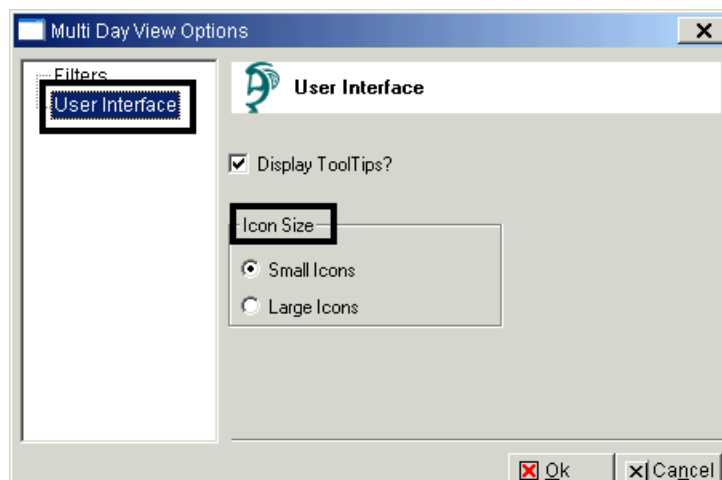
NEW APPOINTMENT EVENT

Appointments are events which do not involve a client.

- Right click in the white area below the day to be scheduled. A drop down menu appears. Click "New Appointment"
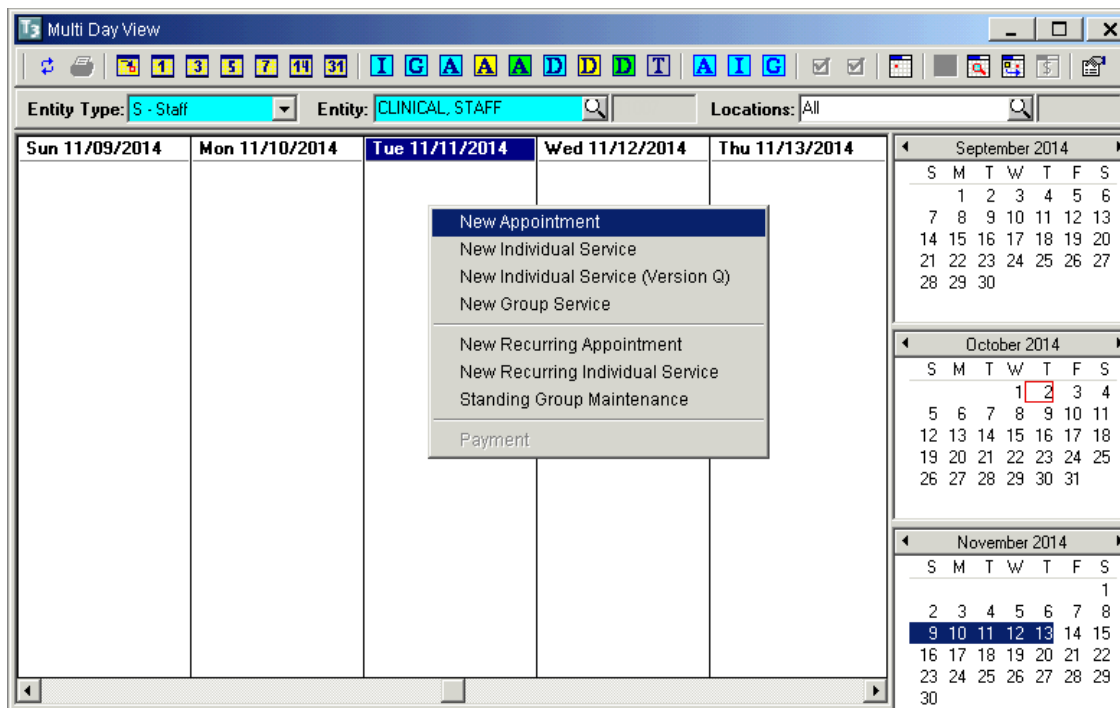
- An appointment window appears

- Complete the "Subject" line. Enter a subject or a comment that may provide additional information (i.e. Staff Meeting in Conference Room A)

NOTE: You may mark "Private" to prevent the subject line from being viewed by other users. For example: a personal doctor appointment. However, that means only the attendee(s) will be able to open this window to make changes
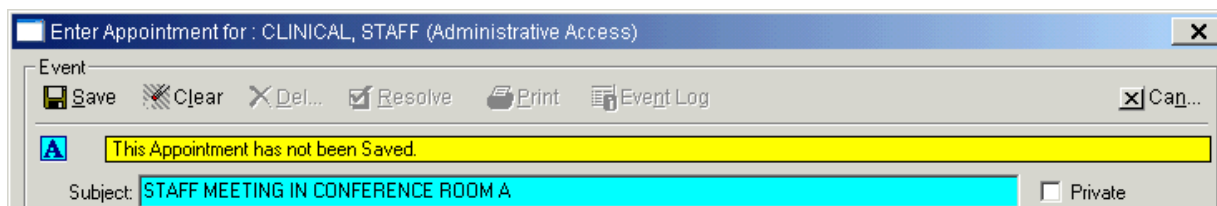
- Select the "Event Type" from the drop down menu. All events are considered "Normal" except for an "All Day" event or a "Task" event. A "Task" event has no time associated with it and as a result will only appear in the Multi-Day view

Event Type: N - Normal
- <Undefined>
A - All Day
N - Normal
Unit: T - Task

- For a "Normal" appointment event, enter the "Start Time." The system will default to "am". To indicate "pm" enter a "p" after the hours and minutes. For duration, enter as H:MM (i.e. 45 minutes would be entered as :45). One hour and fifteen minutes would be 1:15. The system will calculate the "End Time"

Time Type: - <Undefined>
- <Undefined>
B - Busy
F - Free
T - Tentative

Note: In Scheduler, the period (.) is not recognized in all start /stop time fields. Select the "Time Type" from the drop down menu. B – Busy indicates an event has been scheduled; F – Free indicates time that other events could be scheduled T – Tentative indicates that an event is optional

- Enter your Unit, SubUnit, and Location where the appointment is being held. Enter any "comments" if desired

- Click "Save"

Enter Appointment for : CLINICAL, STAFF (Administrative Access)				
🖫 Save ✖ Clear ✕ Del... ☑ Resolve 🖨 Print 📑 Event Log				✖ Can...

A   This Appointment has not been Saved.

Subject: STAFF MEETING IN CONFERENCE ROOM A   ☐ Private

Event Type: N - Normal	Start Date: 11/11/2014	Start Time: 01:00 PM	Duration: 0:45
	End Date: 11/11/2014	End Time: 01:45 PM	Time Type: B - Busy

Unit: TRAINING UNIT   9900   SubUnit: TRAINING SUBUNIT   9901
Location: HHSA MH BILLING UNIT   1

- The "Attendees" box is activated with the staff person's name, "Start Date", "End Date", "Start Time" and "End Time". Additional staff can be added by clicking "Add"

- An "Add Attendee" dialog box opens. Select staff from the "Staff Lookup" drop down menu and click "Save". Repeat as needed

- After adding all attendees, click "Cancel"

EDITING AN APPOINTMENT EVENT

- Right click on the appointment event to be edited and click "Edit Appointment"
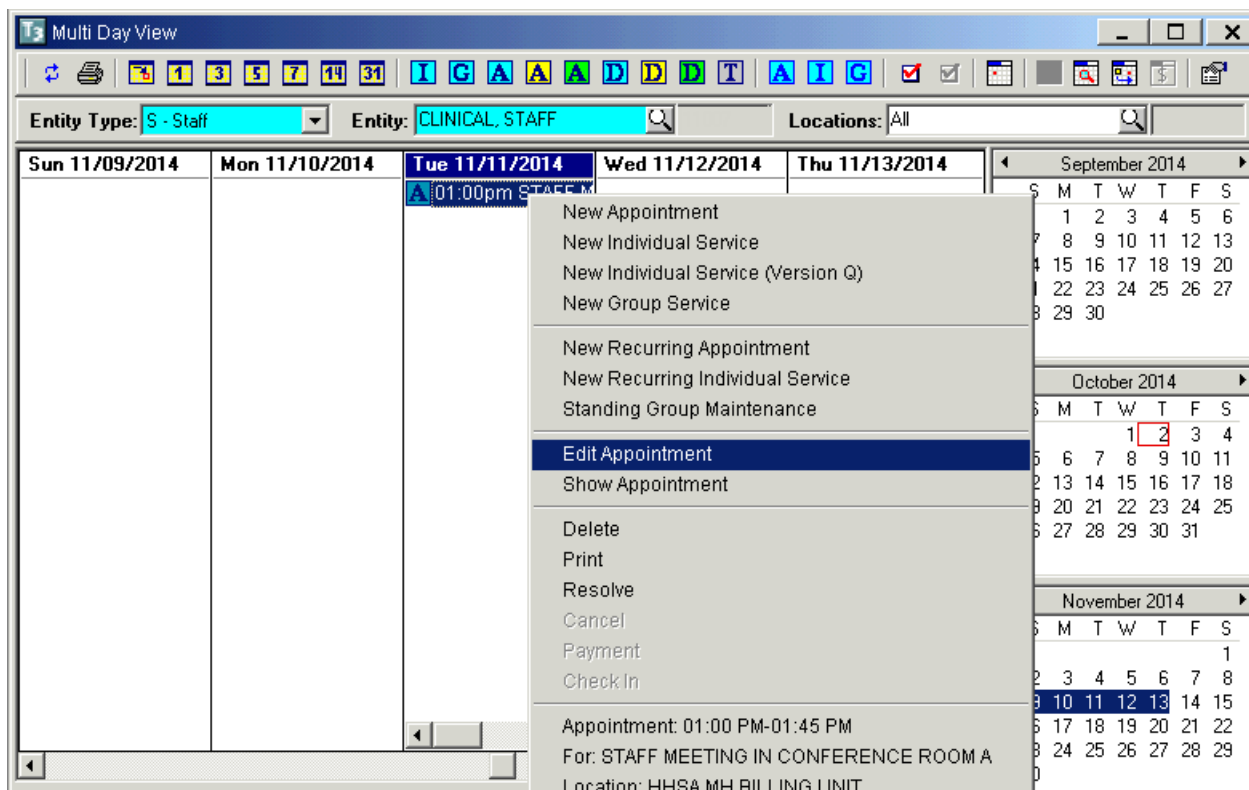
- The "Enter Appointment for [Staff Person's Name]" screen appears. Make changes in the appropriate field(s) and click "Save"

- When the "Update Attendee and Calendar Records?" dialog box appears, click "Proceed with Save"

- If there is a schedule conflict, the "Schedule Conflict" dialog box appears. Click "Yes" to continue and save changes or "No" to review and correct before saving
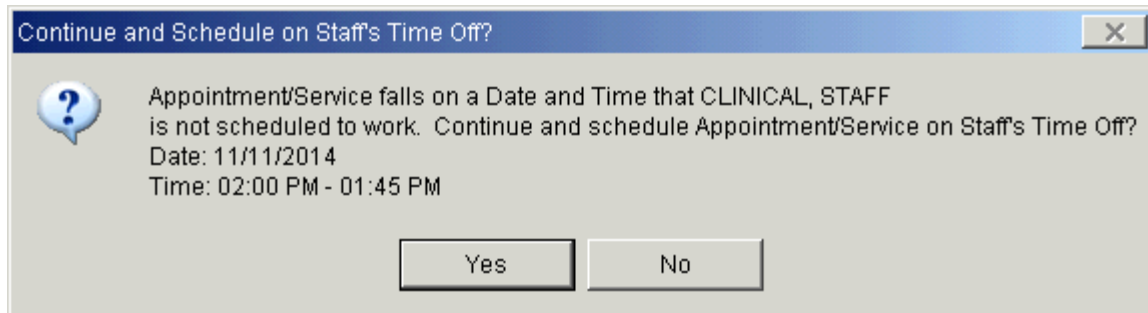
NOTE: A scheduled non-recurring Appointment Event cannot be edited to become a recurring Appointment Event

RESOLVE/UNRESOLVE APPOINTMENT EVENT

When an event is resolved, that indicates that the event took place. Events on future dates cannot be resolved. It is a program decision as to whether or not they resolve appointment events.

There are two ways to resolve an appointment:

- Single click on the desired appointment on the calendar so that it is highlighted, and click the red check icon –or–

- Right click on the desired appointment on the calendar so that the drop down menu appears, and click "Resolve"
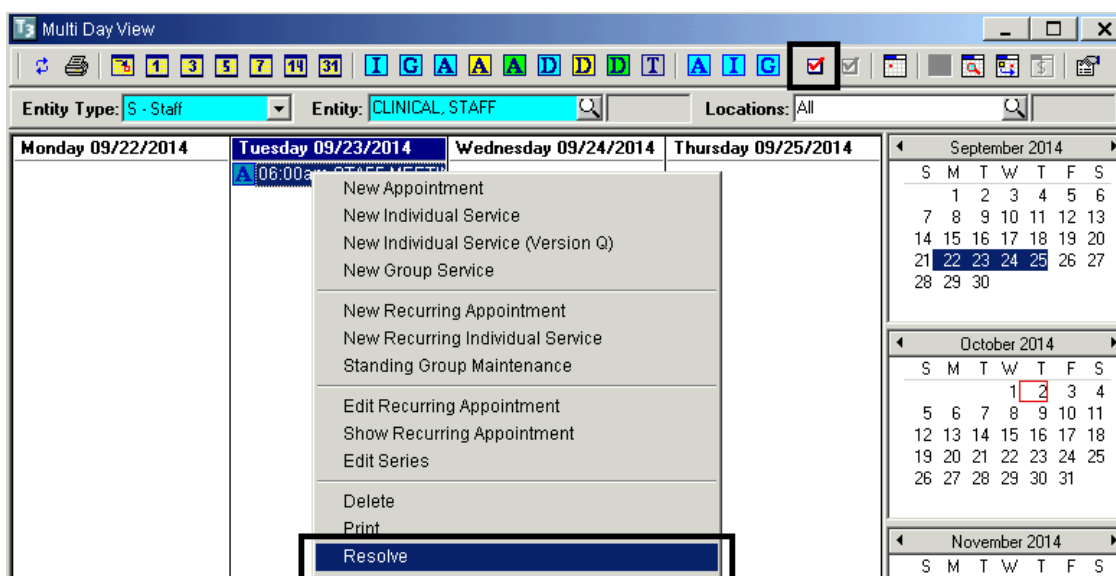
- The Appointment window opens. Click "Resolve", and then click "Cancel"
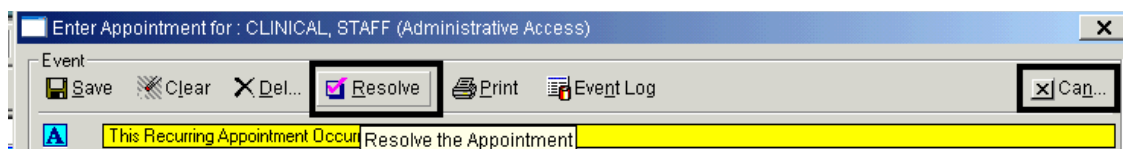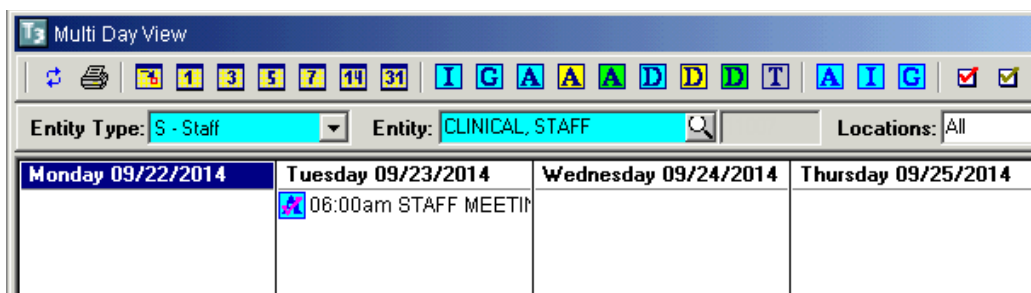
- The event displays on the calendar with a pink check

- *NOTE: If the event does not display on the calendar, check the "View Options" to ensure the "Display Resolved Services" box is checked*

The only reason you would unresolve, is if you resolved by mistake.

There are two ways to unresolve an appointment:

- Single click on the desired appointment on the calendar so that it is highlighted, and click the red check icon

- Right click on the desired appointment on the calendar so that the drop down menu appears, and click "Resolve"
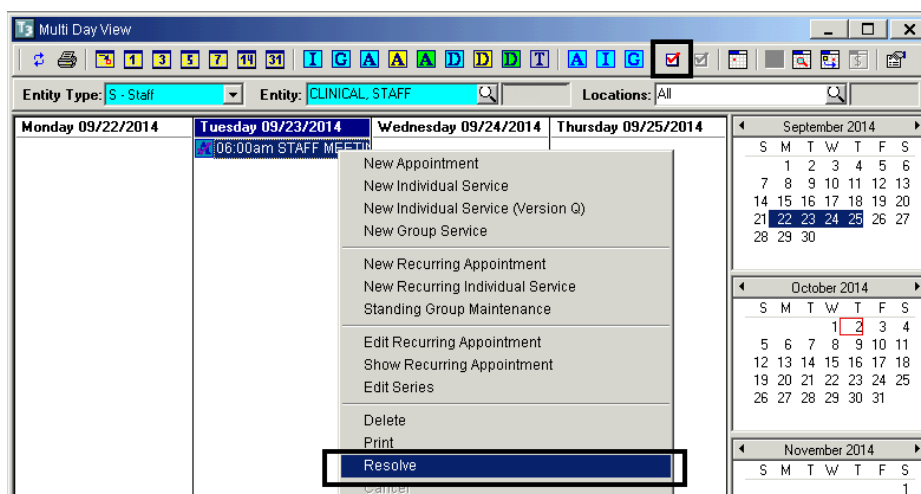
- The appointment window opens. Click "Unresolve", and then click "Cancel"
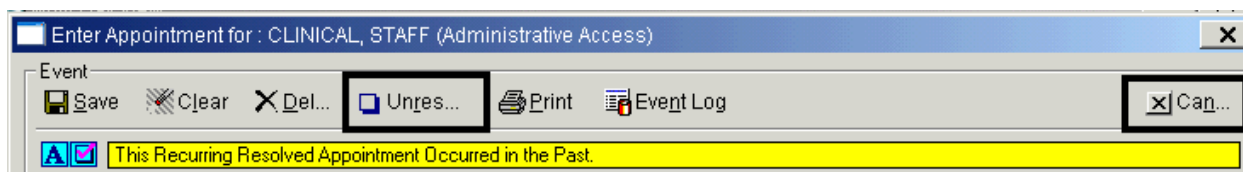
- The event displays on the calendar without a pink check
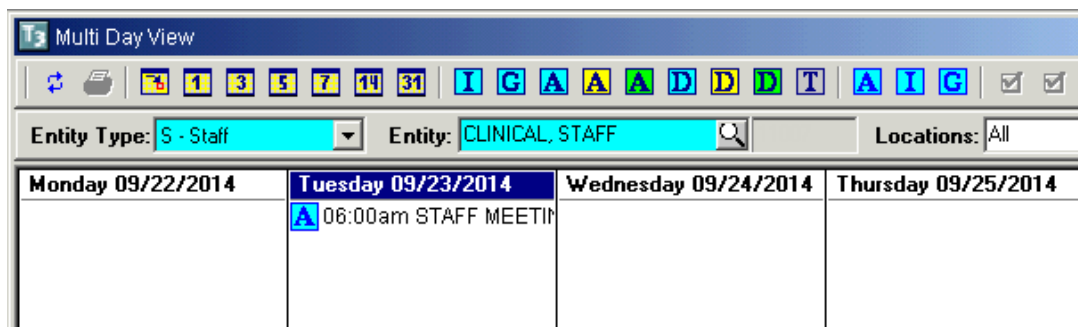
APPOINTMENT EVENT LOG

The Event Log records the creator of an event and tracks the last change by date, time, and staff person. It also documents the cancellation reason by date, time, and staff person. The Event Log can be accessed from within any scheduled event. If the program wishes to track every change that occurs to a scheduled event, staff can enter a comment in the "Comment" section of the event.
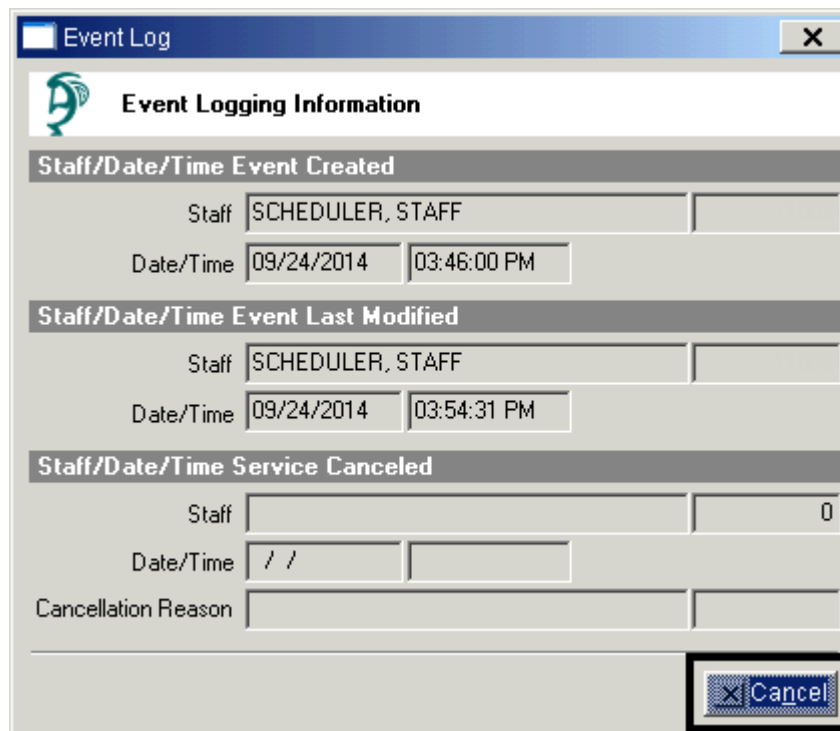
- Open the appointment window either by double clicking on the appointment, or by right clicking and choosing "Edit Appointment" or "Show Appointment" from the drop down menu
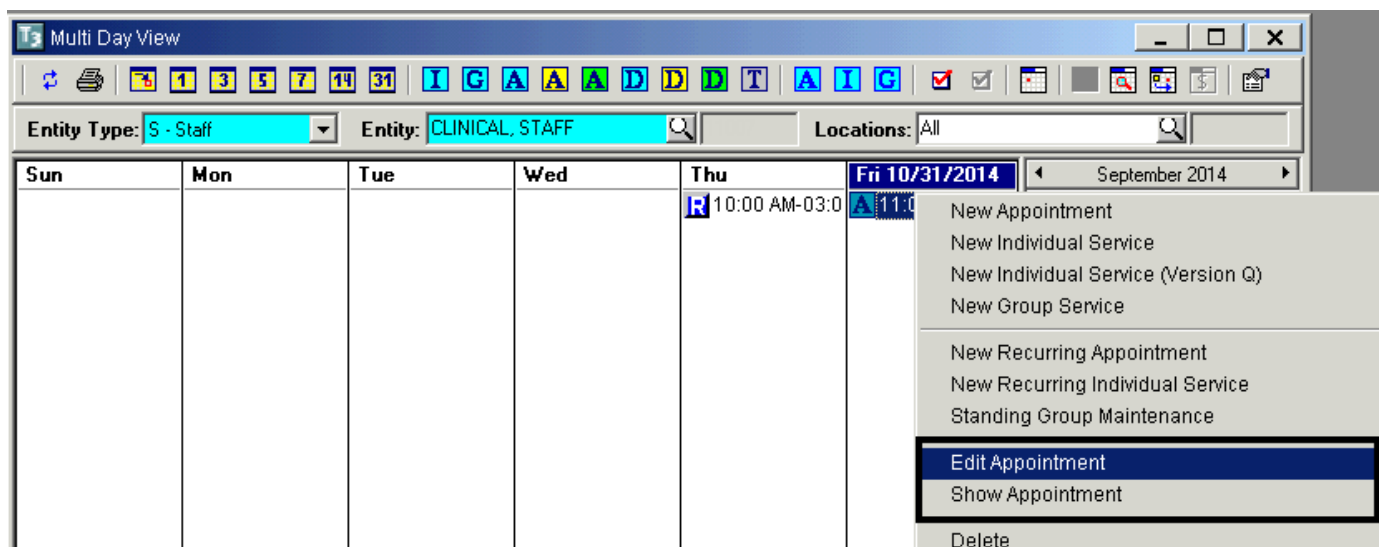
- Click "Event Log"
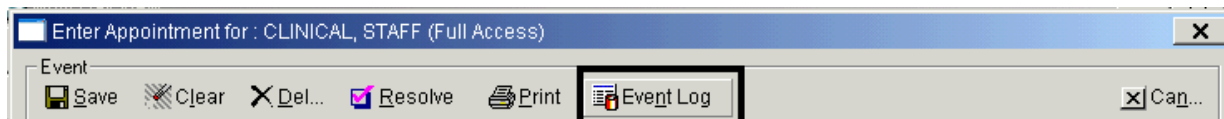
- The tracking information displays. *NOTE: Cancellation information will only display if the event was cancelled*

- Click "CANCEL"

- Click "Cancel" to return to the calendar

PRINTING AN APPOINTMENT SHEET

When an appointment event has been saved, it then can be printed. Single click the appointment so that it is highlighted, and click the print icon at the top of the window.
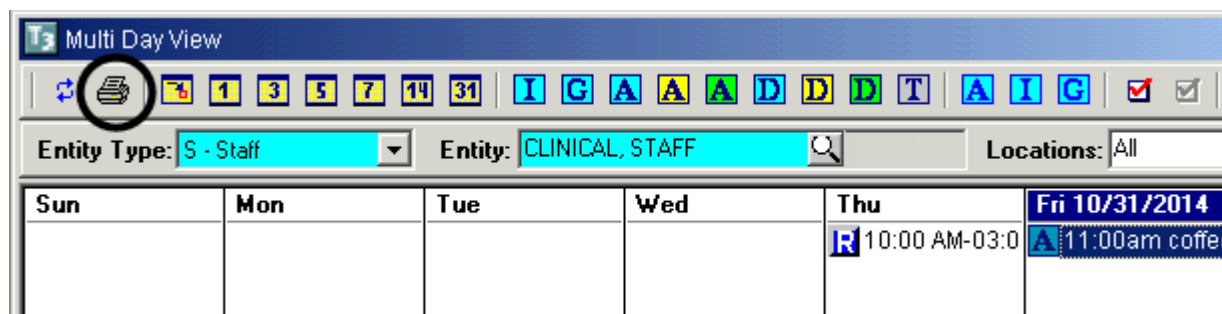
You can also print by right clicking on the appointment and selecting either "Edit Appointment" or "Show Appointment" from the drop down menu
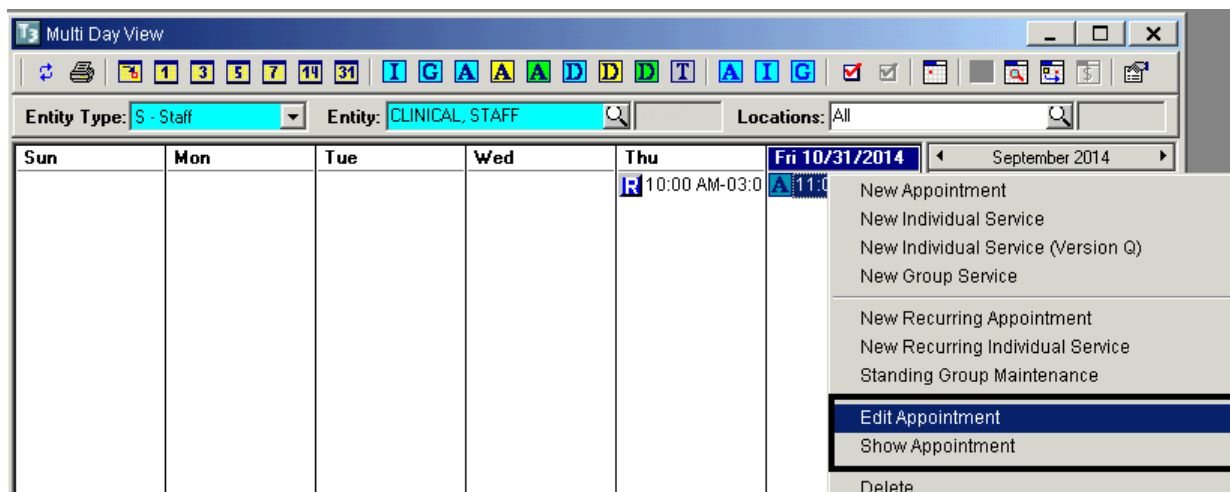
- The "Enter Appointment for [Staff Person's Name]" window appears. Click "Print"

RECURRING APPOINTMENT EVENT

- Right click in the column of the day to be scheduled, and click "New Recurring Appointment" from the drop down menu
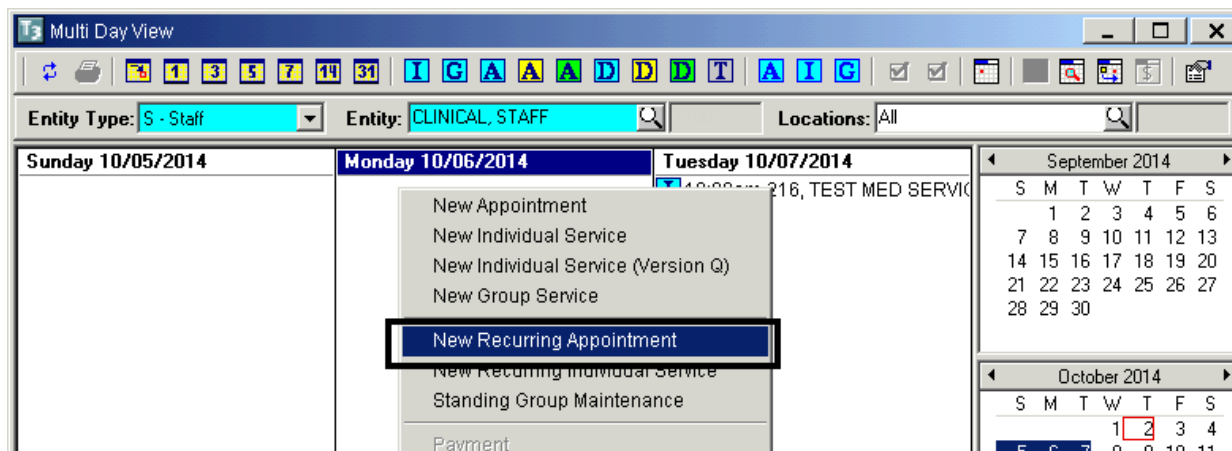
- A "Rules of Recurrence" screen appears. Complete the prompts by entering the appropriate information. The "Start Date" of the recurring appointment must be the date of the first scheduled appointment

- Click "Build"

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- The "Enter Appointment for [Staff Person's Name]" screen appears. Complete prompts by entering the appropriate information

Enter Appointment for : CLINICAL, STAFF (Administrative Access)   [X]

Event
[💾 Save]   [✖ Clear]   [✖ Del...]   [☑ Resolve]   [🖨 Print]   [📋 Event Log]   [✖ Can...]

[A]   This Recurring Appointment has not been Saved.

Subject: TEAM MEETING   ☐ Private

Event Type: N - Normal ▼   Start Date: 10/06/2014 📅   Start Time: 06:00 PM   Duration: 1:00
                          End Date: 10/06/2014 📅   End Time: 07:00 PM   Time Type: B - Busy ▼

- Enter the "Unit", "SubUnit", and "Location".
- Click "Save"

Enter Appointment for : CLINICAL, STAFF (Administrative Access)   [X]

Event
[💾 Save]   [✖ Clear]   [✖ Del...]   [☑ Resolve]   [🖨 Print]   [📋 Event Log]   [✖ Can...]

[A]   This Recurring Appointment has not been Saved.

Subject: TEAM MEETING   ☐ Private

Event Type: N - Normal ▼   Start Date: 10/06/2014 📅   Start Time: 06:00 PM   Duration: 1:00
                          End Date: 10/06/2014 📅   End Time: 07:00 PM   Time Type: B - Busy ▼

Unit: TRAINING UNIT   🔍   9900   SubUnit: TRAINING SUBUNIT   🔍   9901
Location: HHSA MH BILLING UNIT   🔍   1
Comments: |

Attendees
[📇 Add]   [📇 Edit]   [✖ Del...]

- The "Attendees" box is then activated. If desired, click "Add" to enter additional staff

Attendees
[📇 Add]   [📇 Edit]   [✖ Del...]

Type	Name	Start Date	End Date	Start Time	End Time
S	CLINICAL, STAFF	10/06/2014	10/06/2014	06:00 PM	07:00 PM

- Enter additional staff in the "Staff" field and "Save"

- Once finished, click "Cancel"

EDIT SERIES OF APPOINTMENT EVENTS

- To change an entire series that has already been scheduled, right click on any appointment in the series, and click "Edit Series"
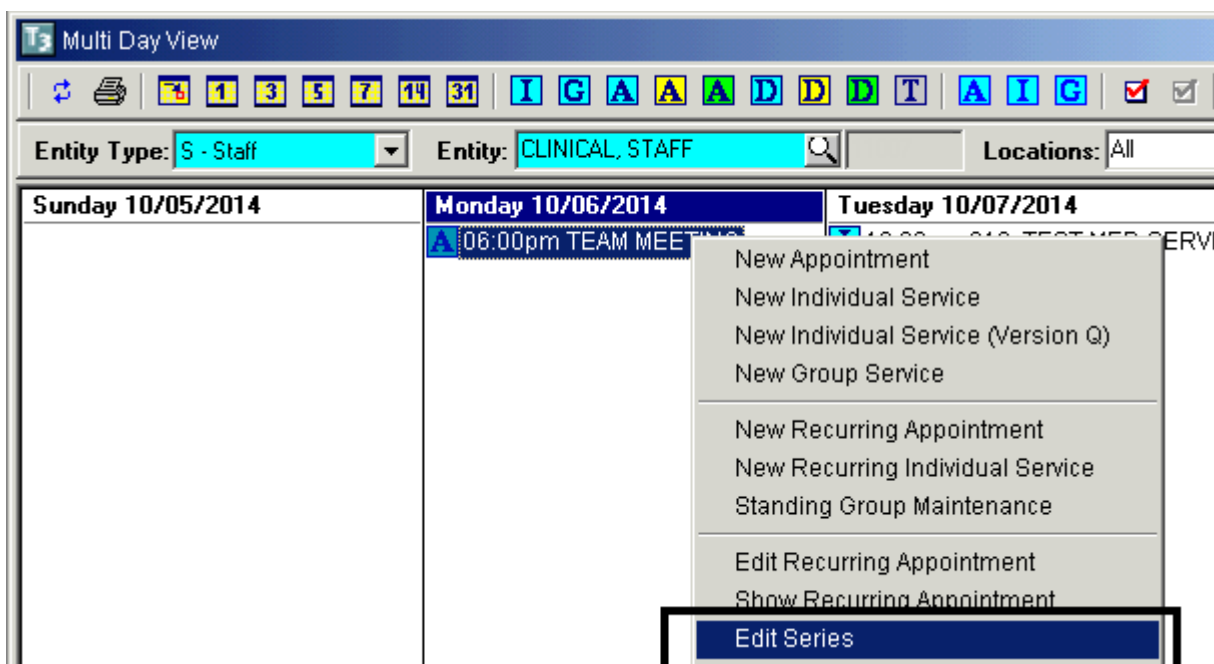
- Check the box next to any appointment in the series, and click "Edit an Appointment"
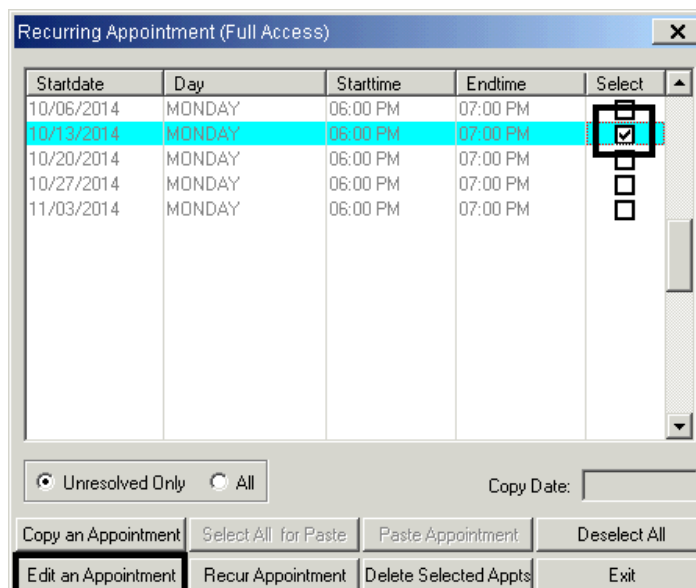
- Make the necessary change(s) and "Save"

NOTE: In this example, the time is being changed from 6:00-7:00 to 5:00-6:00
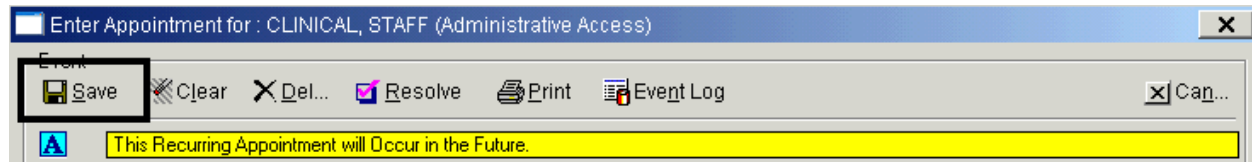
- "Proceed with Save" when you are asked to "Update all attendee and calendar records with new event time"
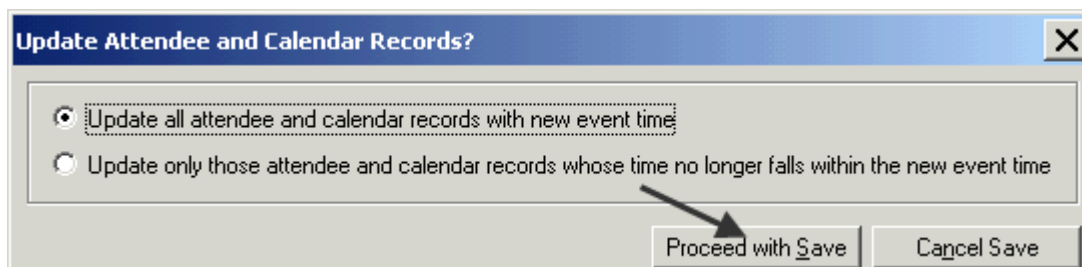
- Click "Cancel"
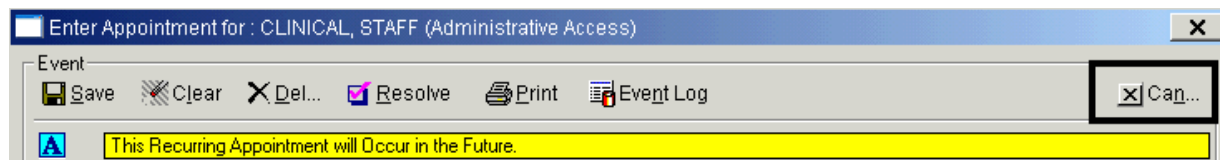
- If you wish to make the same change to other appointments in the series:
    - Select you appointment to copy
    - "Copy an Appointment"
    - "Select All for Paste"
    - "Paste Appointment"

- The entire series is then updated with the change. Click "Exit"

RECUR EXPIRED APPOINTMENT EVENT
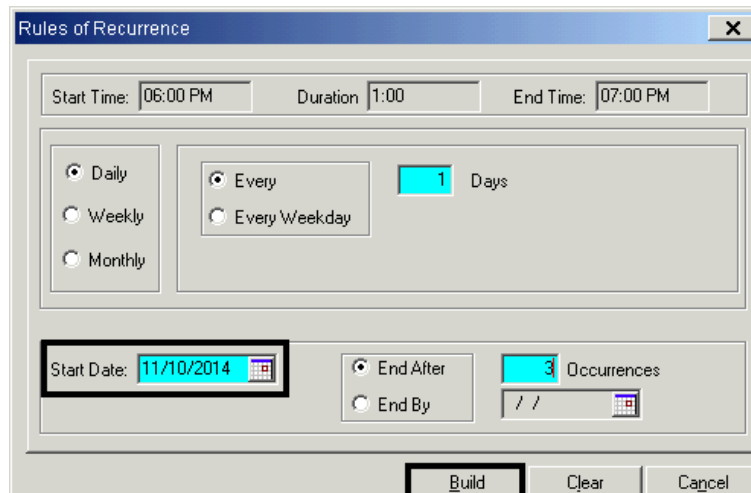
- If a recurring appointment is expiring, and you wish to add more occurrences to the series, right click on any appointment in the series, and click "Edit Series"
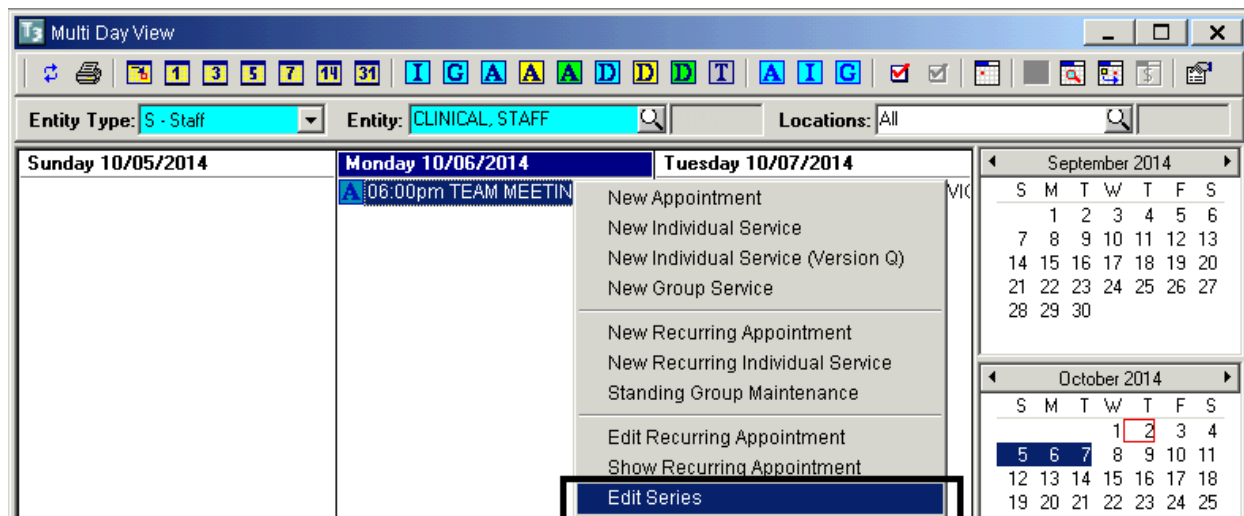
- Check the box next to the last appointment in the series, and click "Recur Appointment"

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- Set the Rules of Recurrence. Make sure the Start Date is the first day that is not already scheduled (otherwise duplicate appointments will appear). Click "Build"

- "Exit" from the Rules of Recurrence

DELETE ONE APPOINTMENT EVENT

- Right click on the desired appointment and click "Delete"
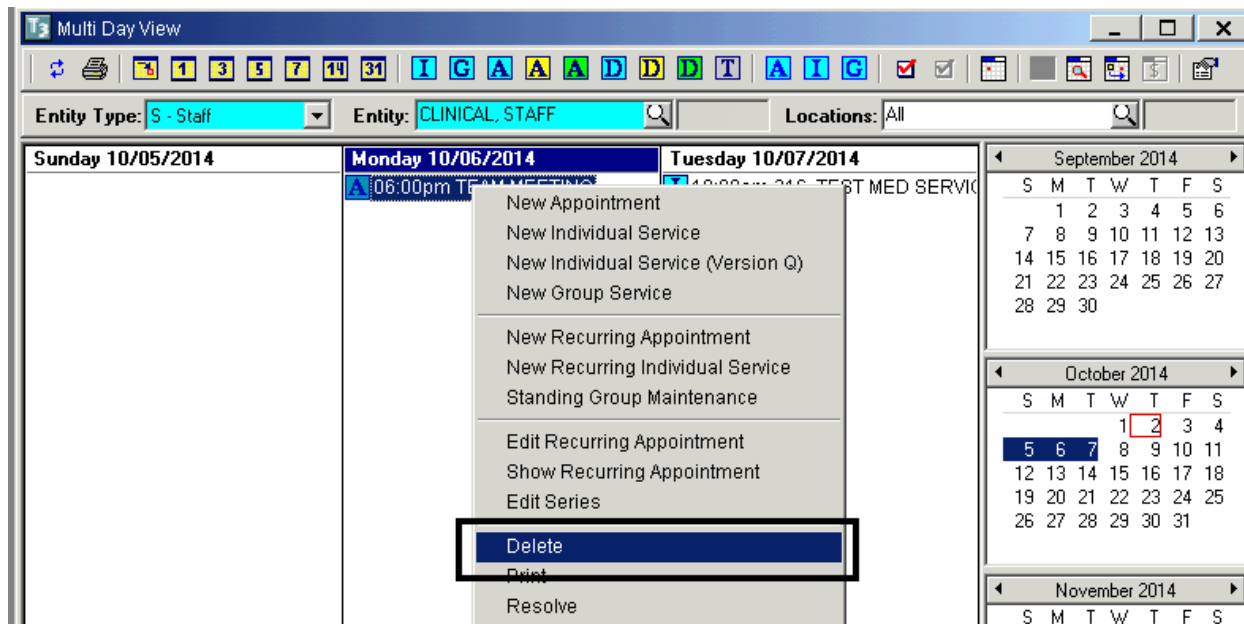
DELETE SERIES OF APPOINTMENT EVENTS

- Right click on any appointment in the series, and click "Edit Series"
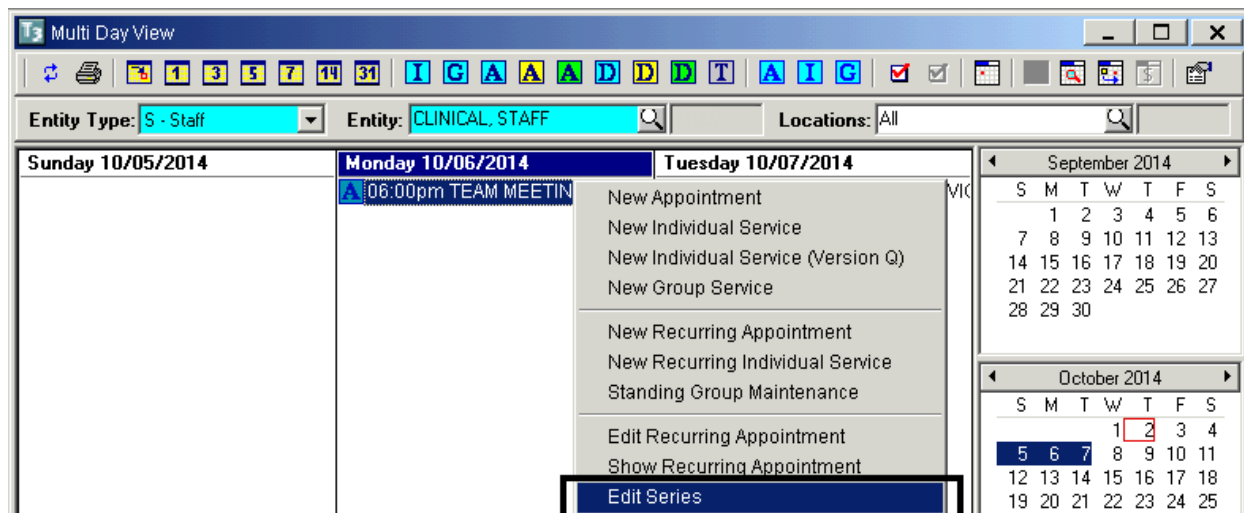
- Check the boxes next to the desired appointments, and click "Delete Selected Appts"

- They are then removed from the series. Click "Exit"

VERSION Q

Version Q has fewer fields to complete than the individual client service screen. Version Q does not allow for the scheduling of a collateral server, comments cannot be added, and when Version Q service events are edited, they are done so in the individual client service screen.

- Right click in the open white area below the day you wish to schedule and click "New Individual Service (Version Q)" from the drop down menu
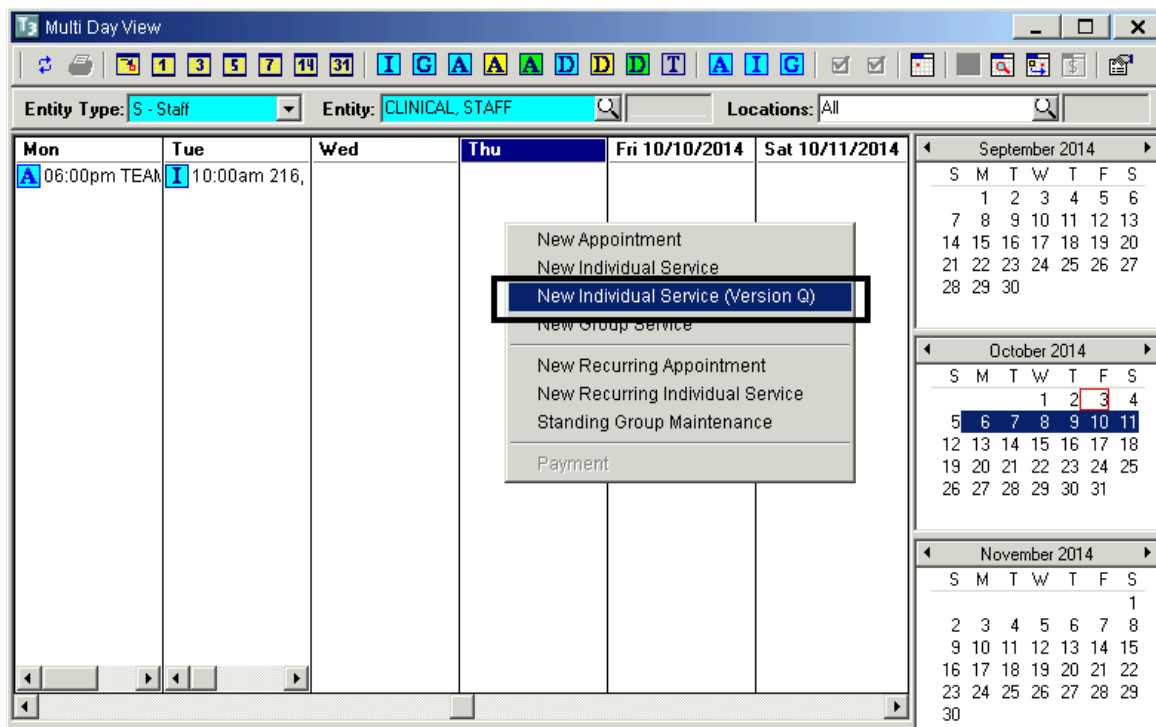
A. The "Subject" can be manually entered, or it can be left blank. If it is left blank, it will default to the service code description after selecting the service code

B. Enter the "Start Time". The system will default to "am." Either enter military time, or the letter "p" for pm. For duration, enter as H:MM (i.e. forty-five minutes is :45 and one hour and fifteen minutes is 1:15).The system will calculate the "End Time" automatically

C. Select the client from the "Client Look Up" screen

D. When the "Unit" is entered, the "Location" field automatically fills. Enter the Sub Unit

E. The "Staff" field defaults to the entity selected when you originally right clicked on the Multi Day View; however, the staff person can be changed

- From the drop down menu, select the intended Service Code for the service event

- Once a service code is selected, the service indicators auto fill

- If the place of service is different than the default for "Prov. At", enter the correct "Provided At" from the "Place of Service" look-up

- Enter an "Outside Facility" if "K", "D", or an "S" is selected as the place of service

- The other indicators can be changed if desired. Click "Save"

INDIVIDUAL SERVICE EVENT WITH A COLLATERAL SERVER

- Right click in the column of the day to be scheduled and click "New Individual Service" from the drop down menu

- The "Add/Edit Individual Service Scheduled for [Staff Person's Name]" screen appears

- Complete the necessary information in the top container and click "Save"

- The Collateral Server button and the bottom container activate. Click the "Coll. Svrs" button

- Enter the necessary information for the collateral server(s), press the tab key on the keyboard until the next row becomes active, and click "Exit"

- Enter the necessary information in the bottom container, click "Post/Save Service", and click "Exit"

EDIT SERVICE EVENT

- Right click on the individual service event to be edited. Click "Edit Individual Service" from the drop down menu

- The "Add/Edit Individual Service for [Staff Member's Name]" screen appears. Make the appropriate changes in the top container, "Save". Make the appropriate changes in the bottom container, and click "Post/Save Service"

- The "Update Attendee and Calendar Records?" dialog box appears. Click "Proceed with Save".

- Click "Exit"

NOTE- A scheduled non-recurring Individual Service cannot be edited to become a recurring event

RESOLVE/UNRESOLVE INDIVIDUAL SERVICE EVENT

When an event is resolved, that indicates that the event took place. Events on future dates cannot be resolved. NOTE: SDCMHS policy regarding scheduled events is that service events that actually occurred shall be resolved. Service events that did not occur shall not be resolved.

There are two ways to resolve an individual service event:

- Single click on the desired individual service event on the calendar so that it is highlighted, and click the red check icon –or–
- Right click on the desired appointment on the calendar so that the drop down menu appears, and click "Resolve"
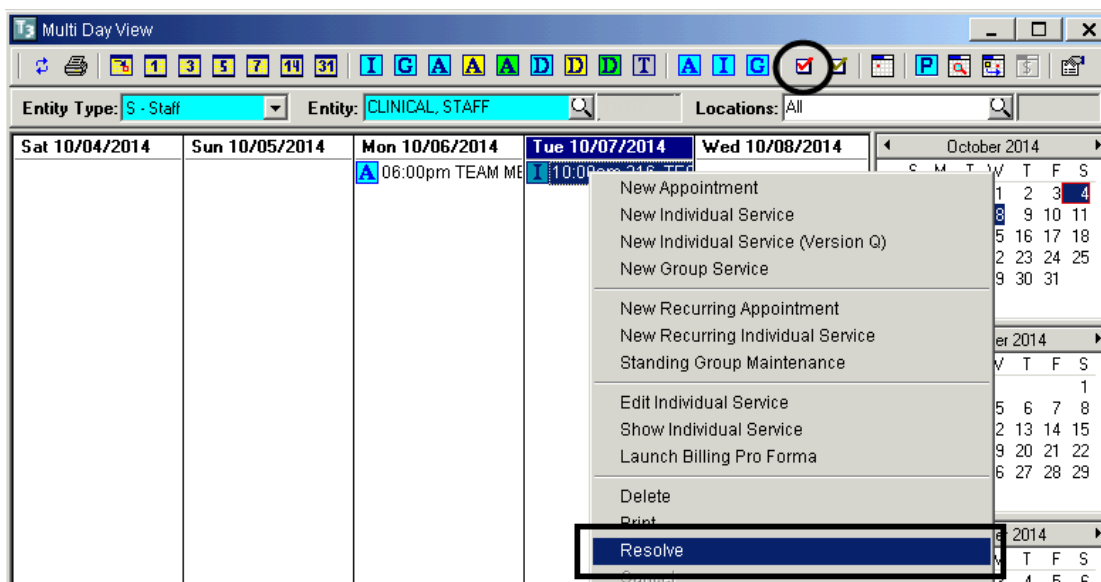
- The "Add/Edit Individual Service Scheduled for [Staff Member Name]" window opens. Click "Resolve Service"
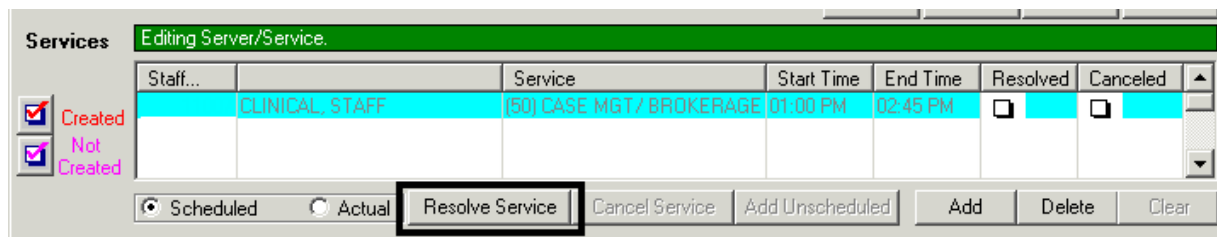
- A pink check box appears in the resolved column of the middle container

- Click "Exit"

- The event displays on the calendar with a pink check

NOTE: If the event does not display on the calendar, check the "View Options" to ensure the "Display Resolved Services" box is checked

The only reason you would unresolve, is if you resolved by mistake.

There are two ways to unresolve an individual service event:

- Single click on the desired appointment on the calendar so that it is highlighted, and click the red check icon –or–
- Right click on the desired appointment on the calendar so that the drop down menu appears, and click "Resolve"
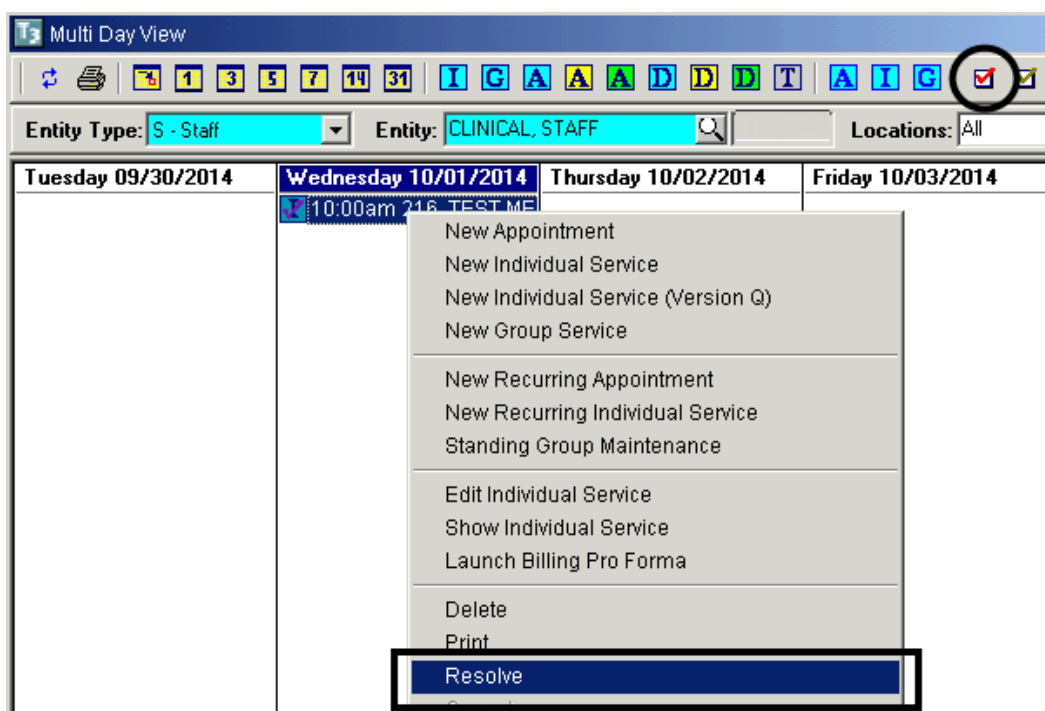
- The "Add/Edit Individual Service Scheduled for [Staff Member Name]" window opens. Click "Unresolve Service"
-
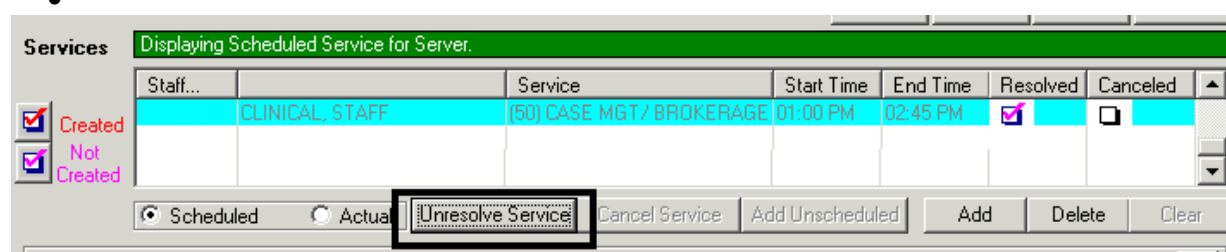
- The pink check box that was in the resolved column of the middle container disappears

- Click "Exit"

The event displays on the calendar without a pink check

CANCEL/UNCANCEL

- Right click on the individual service event you wish to cancel, and from the drop down menu, click "Cancel"
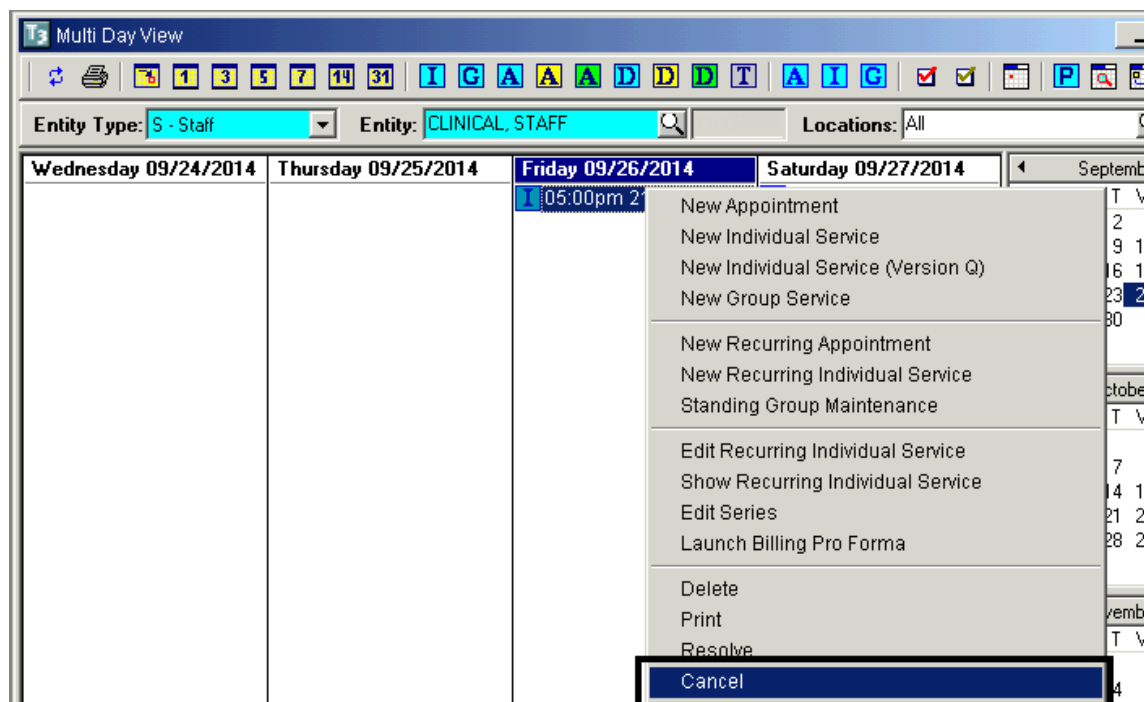
- In the middle container, click "Cancel Service"
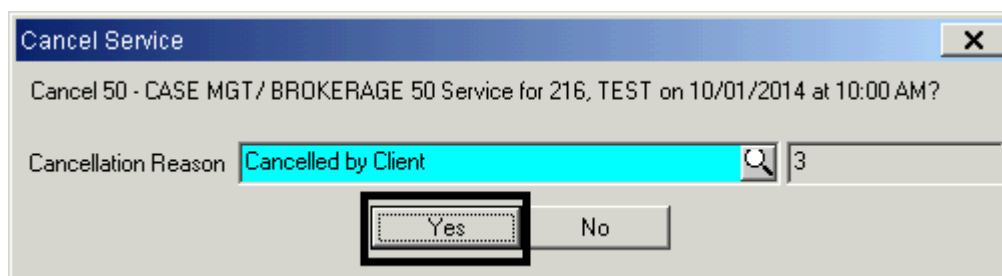
- The "Cancel Service" dialog box appears. Click the magnifying glass to access the "Cancellation Reason" table
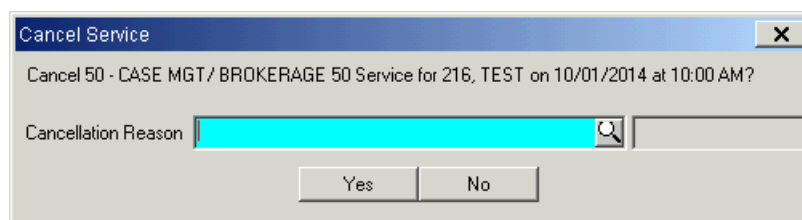
- Once a cancellation reason is selected, click "Yes"
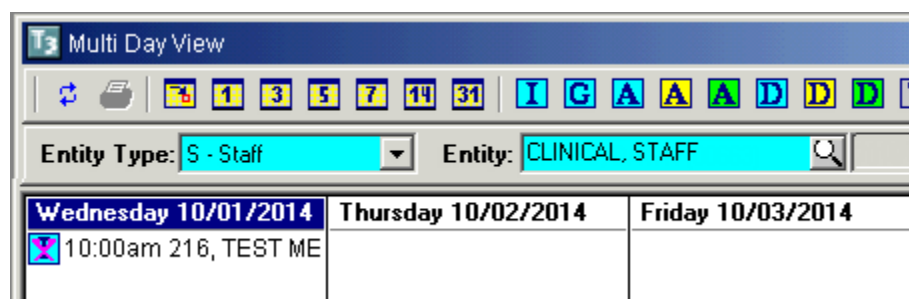
- Click "Exit"

- The cancelled Individual Service Event displays on the calendar with a pink X

NOTE: If the event does not display on the calendar, check the "View Options" to ensure the "Display Cancelled Services" box is checked

NOTE: The only reason you would uncancel is if you cancelled by mistake

- Right click on the service you wish to uncancel, and from the drop down menu, click "Cancel"
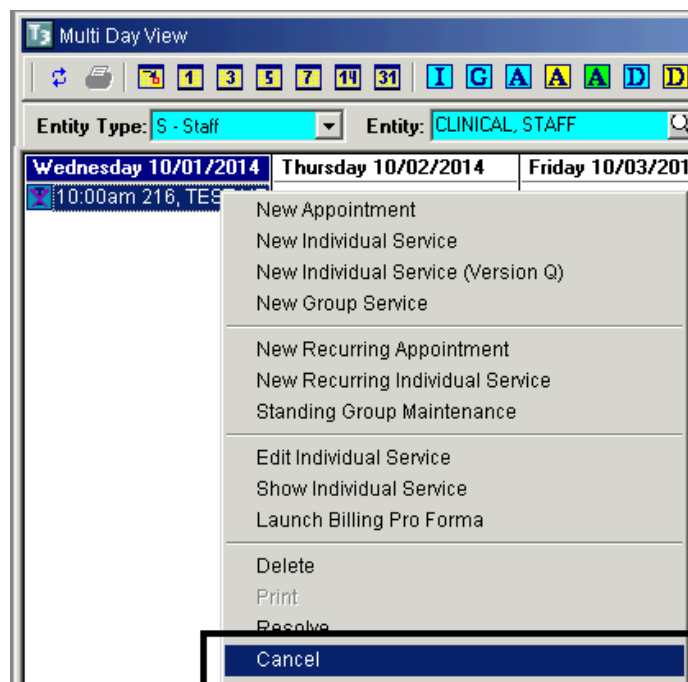
- Click the "Uncancel Service" button in the middle container
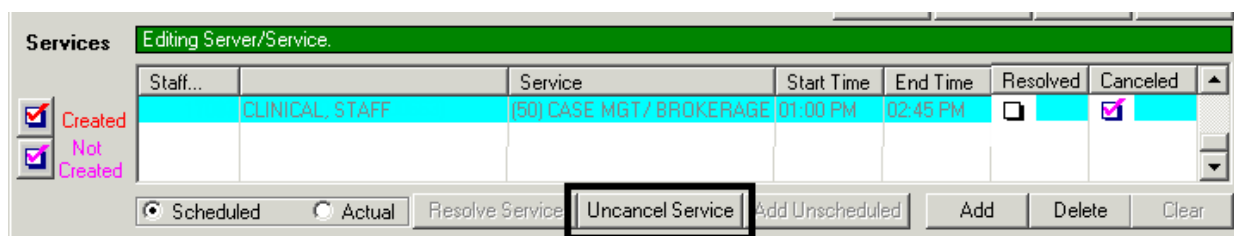
- Click "Exit" to return to the schedule
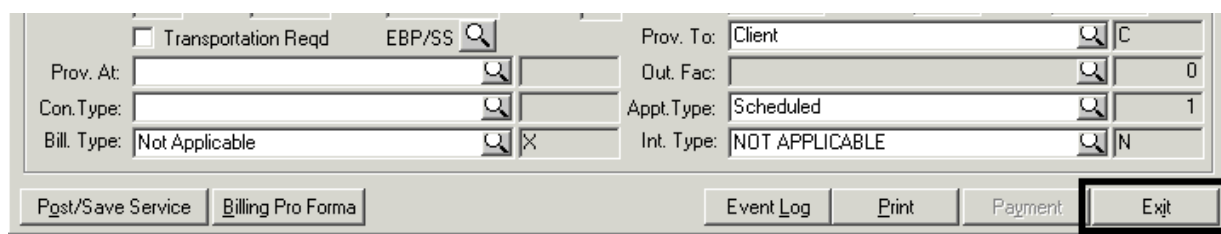
- The service event appears on the Multi Day View screen without the pink X
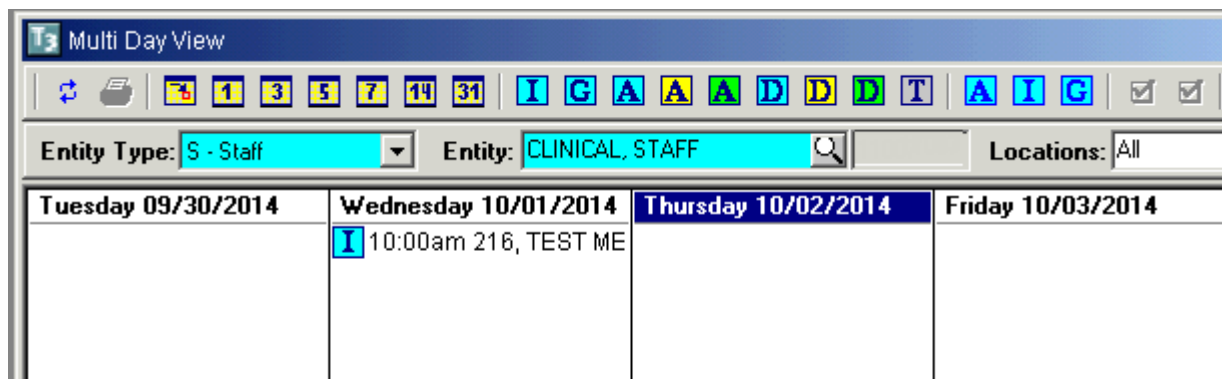
CHECK IN/CHECK OUT

There are two ways to indicate that a client has arrived for the service event:

- Single click on the desired appointment on the calendar so that it is highlighted, and click the green check icon –or–
- Right click on the desired appointment on the calendar so that the drop down menu appears, and click "Check In"
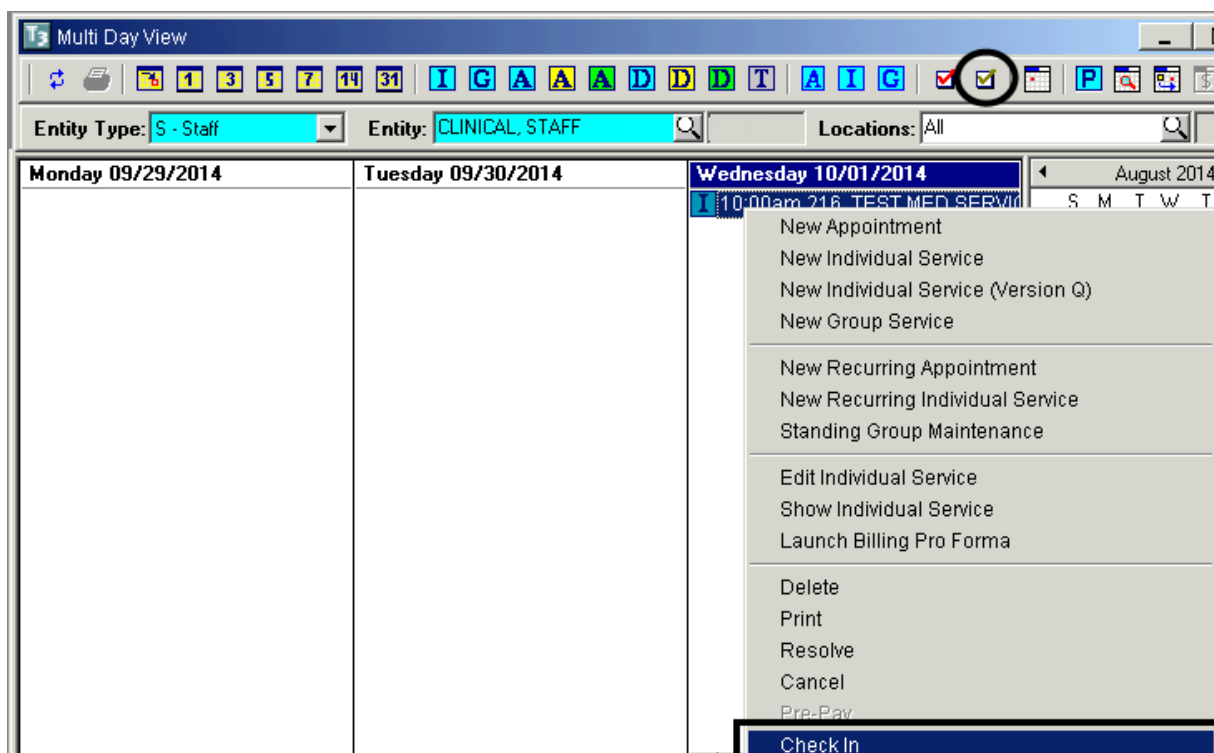
- A green check mark appears next to the event
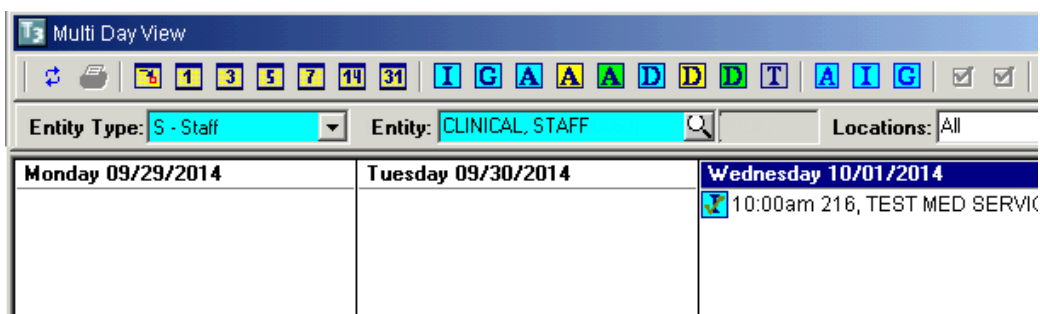
There are two ways to indicate that the client has checked out:

- Single click on the desired appointment on the calendar so that it is highlighted, and click the green check icon –or–
- Right click on the desired appointment on the calendar so that the drop down menu appears, and click "Check Out".
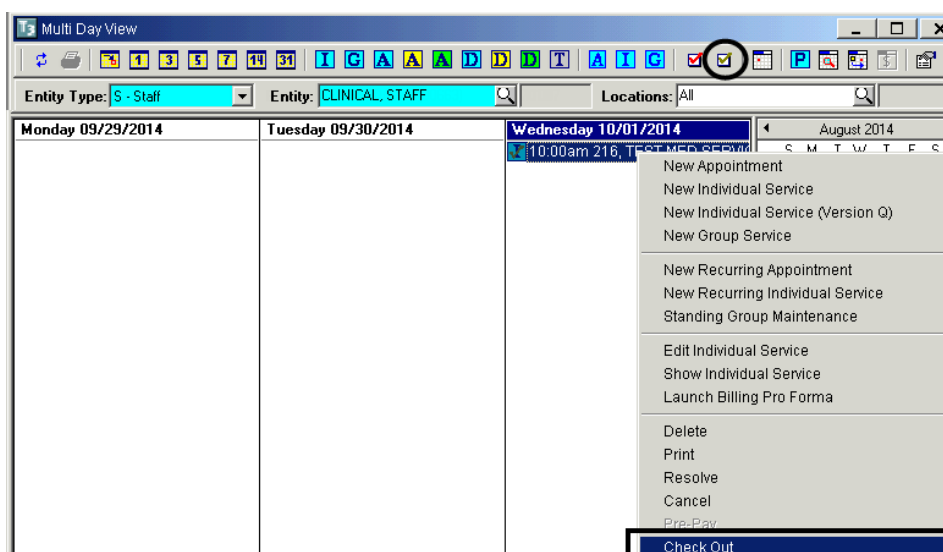
- The green check mark next to the event disappears
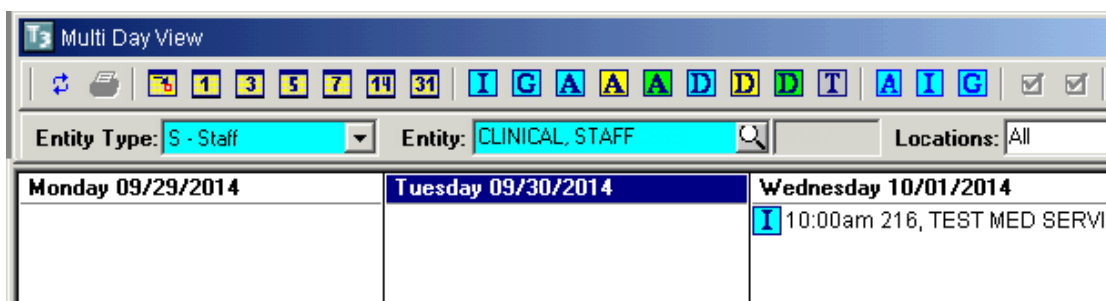
BILLING PRO FORMA

- To see how a scheduled service will be billed to the client's pay source(s), right click on the desired service and click "Launch Billing Pro Forma"

- The dialog box appears. Once you are done viewing, click "OK"

EVENT LOG WITH CANCELLED SERVICE EVENT

- Open the individual service window either by double clicking on the service event, or by right clicking and choosing "Edit Individual Service" or "Show Individual Service" from the drop down menu

- Click "Event Log"

- The tracking information displays, including the cancellation information if the event was cancelled. Once you are done viewing, click "Cancel"

- Click "Exit"

PRINT CONSUMER ENCOUNTER FORM

The Consumer Encounter form includes information about the selected event.

- Right click on the desired event and click "Print"

NOTE: The Consumer Encounter Form is for staff use only and is not an appointment sheet for the client. Programs can determine how the form can be best utilized.

RECURRING INDIVIDUAL SERVICE EVENT

NOTE: Programs shall not exceed 90 days or twelve (12) weeks, when setting the "Rules of Recurrence" in the "End after" or "End by" fields.

- Right click in the column of the day to be scheduled, and click "New Recurring Individual Service" from the drop down menu
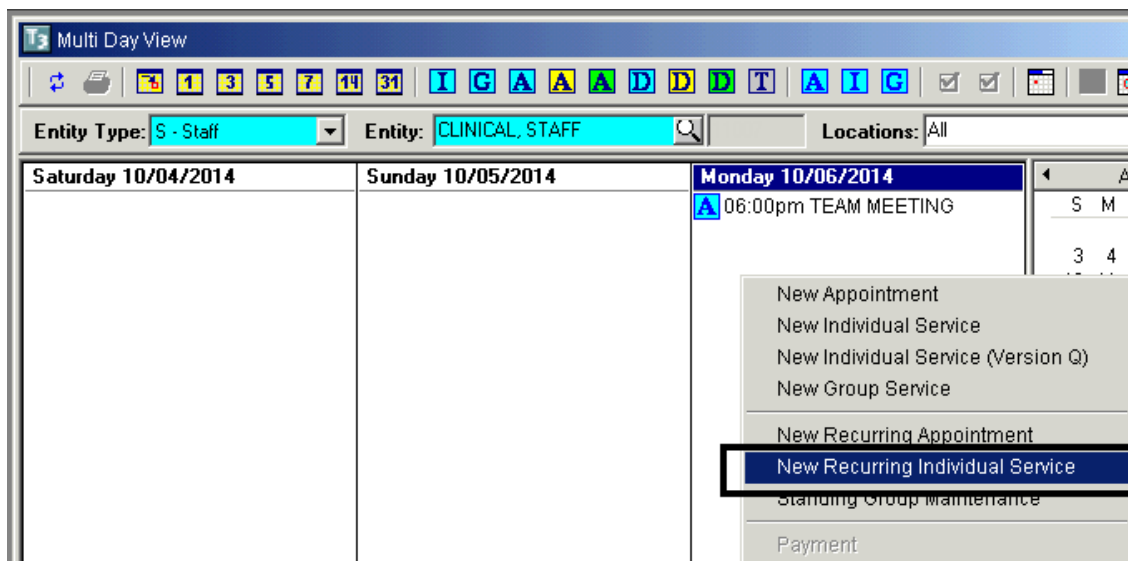
- The "Rules of Recurrence" screen appears. Enter the appropriate information and click "Build"

- The "Add/Edit Individual Service Scheduled for [Staff Person's Name]" screen appears. Enter the appropriate information in the top container and click "Save"

- Enter the appropriate information in the bottom container and click "Post/Save Service"

- Click "Exit"

EDIT ONE INDIVIDUAL SERVICE EVENT IN A SERIES

- Right click on the individual service event to be edited. Click "Edit Recurring Individual Service" from the drop down menu

- The "Add/Edit Individual Service for [Staff Member's Name]" screen appears. Make the appropriate changes in the top container, "Save". Make the appropriate changes in the bottom container, and click "Post/Save Service"

- The "Update Attendee and Calendar Records?" dialog box appears. Click "Proceed with Save".

- Click "Exit"

EDIT ALL INDIVIDUAL SERVICE EVENTS IN A SERIES

- Right click on any individual service event in the series and click "Edit Series"

- The "Recurring Service" screen displays. Check any box and click "Edit a Service"
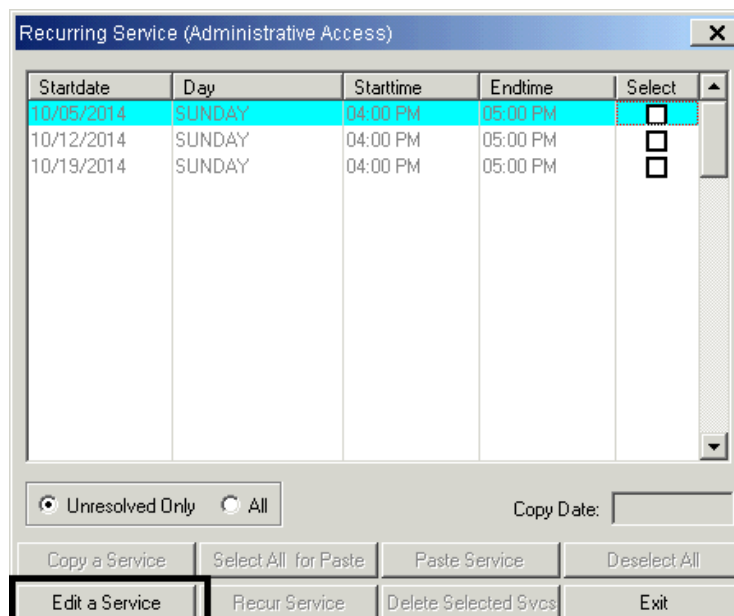
- The "Add/Edit Individual Service" screen displays. Make the appropriate changes in the top container, "Save". Make the appropriate changes in the bottom container, and click "Post/Save Service"

- Click "Exit"

- To copy the change to the remaining dates in the series, check the box next to the service you just edited and click "Copy a Service"

- Either check the box(es) next to the services you wish to copy the change to, or, if the change applies to all services, click "Select All for Paste"

- Click "Paste Service" which copies the change to the services you selected

- Click "Exit"

RECUR EXPIRED SERVICE EVENT

- Right click on any individual service event in the series and click "Edit Series"
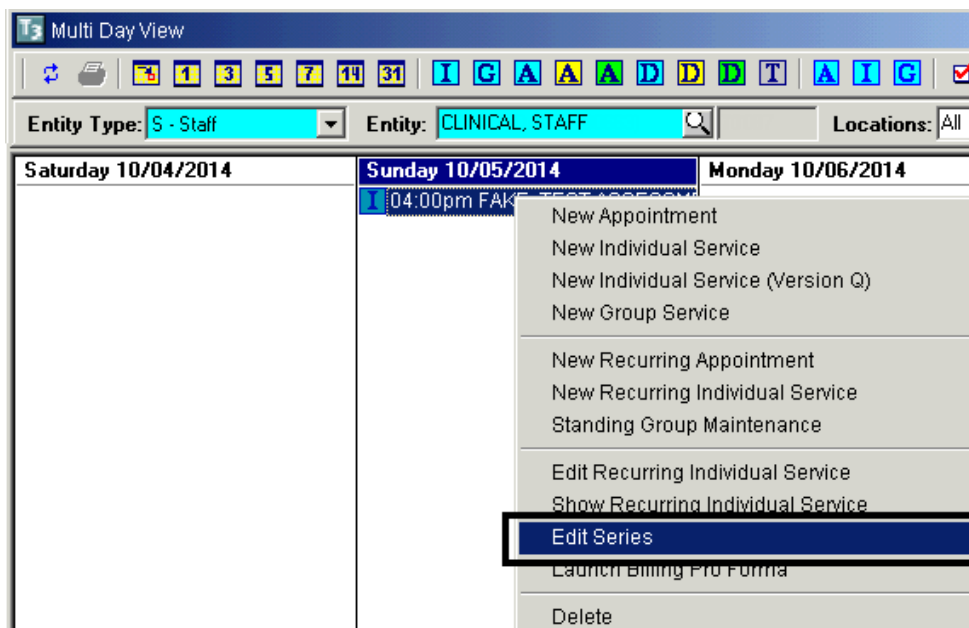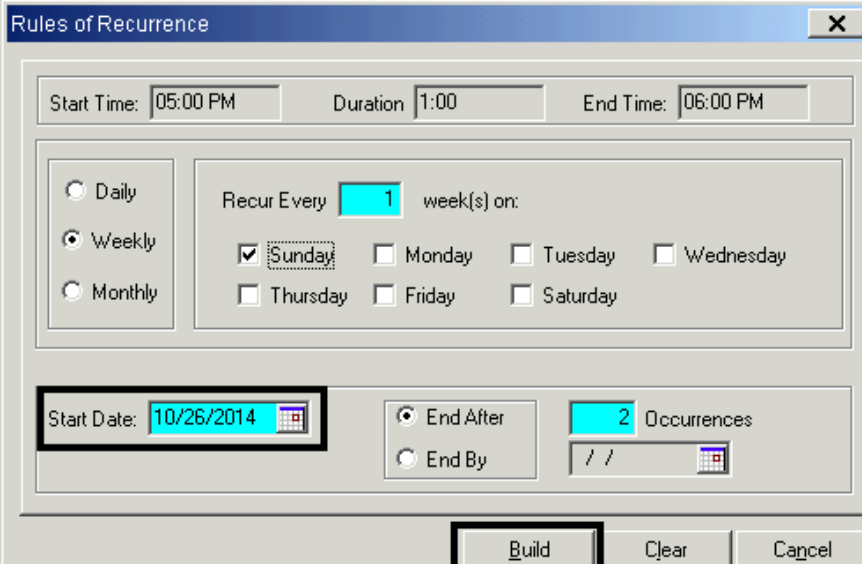
- The "Recurring Service" window displays. Check the bottom select box and click "Recur Service"

- Set the "Rules of Recurrence". Make sure the Start Date is the first day that is not already scheduled (otherwise duplicate appointments will appear). Click "Build"

- Exit from the Recurring Service window

APPOINTMENT LISTING

- To see the list of scheduled events for the "Entity" in the Multi Day View, click the "Appointment Listing" icon
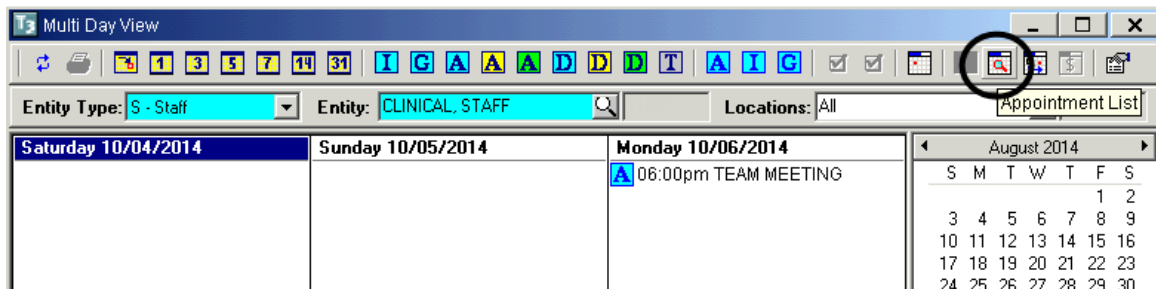
- Adjust the dates accordingly, click "Refresh" and click "Print"
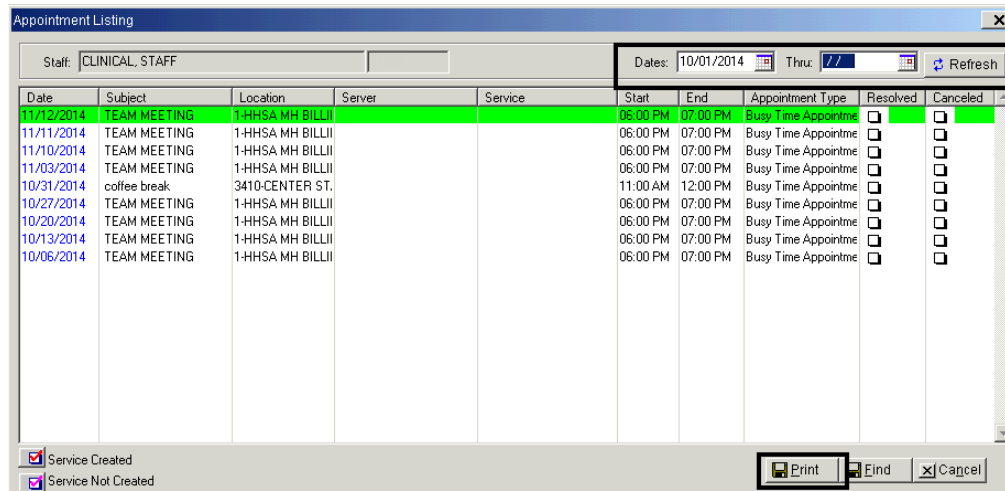
- Choose "Screen" as the Print Destination, and click "OK"
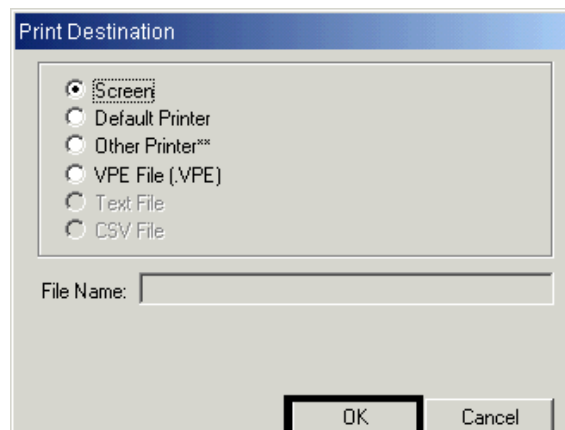
- Once you are done viewing, click "Close Preview"

- On the "Appointment Listing", click "Cancel"

PRINT NEXT APPOINTMENT

- To print the client's next service event, click the "Print Next Appointment" icon
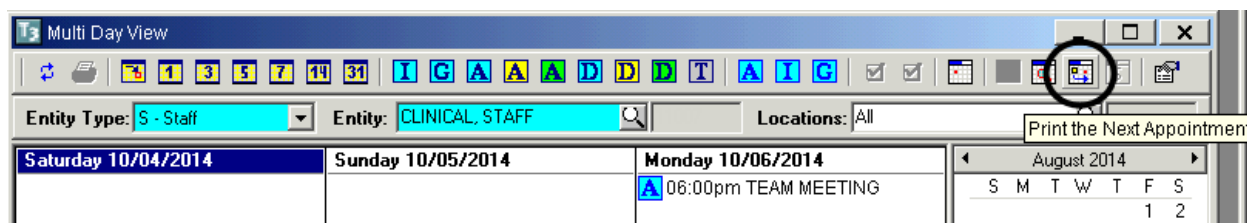
- Enter the desired client, click on the service event you wish to print, and click "Print"
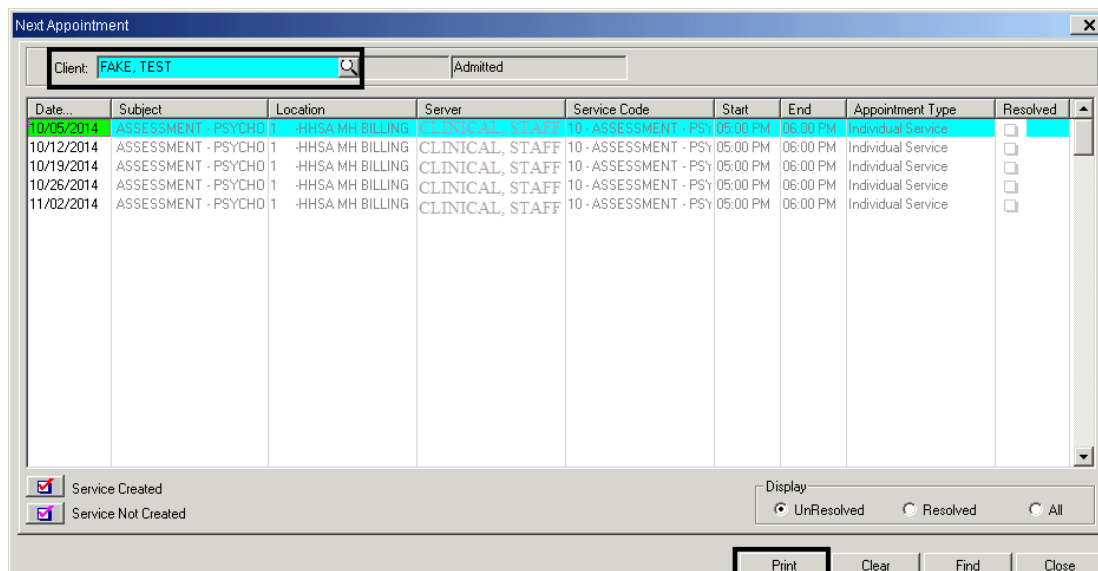
- Choose "Screen" as the Print Destination, and click "OK"
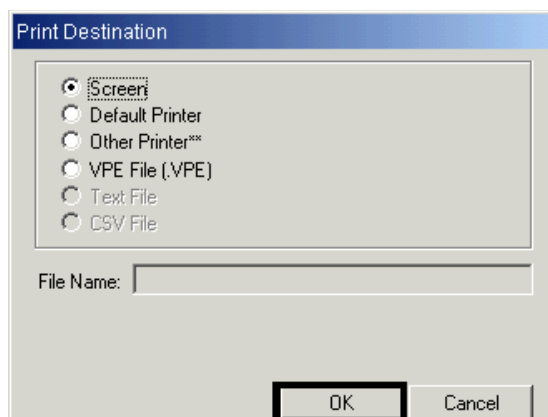
- Once you are done viewing, click "Close Preview". NOTE: If you are printing for a client, be sure not to give them the "Balance" section at the bottom of the page
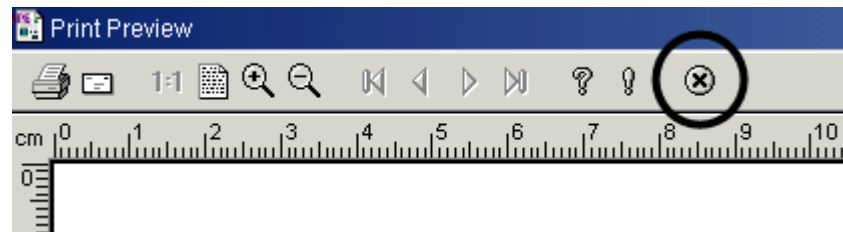
- On the "Next Appointment" window, click "Close"

SINGLE DAY VIEW

The Single-Day View displays more than one staff member's schedule at a selected location for a single day.

- Click the Scheduler menu, and click "Scheduler Maintenance- Single-Day"
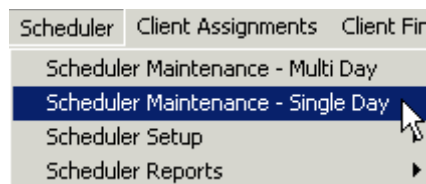
- Click "Add"
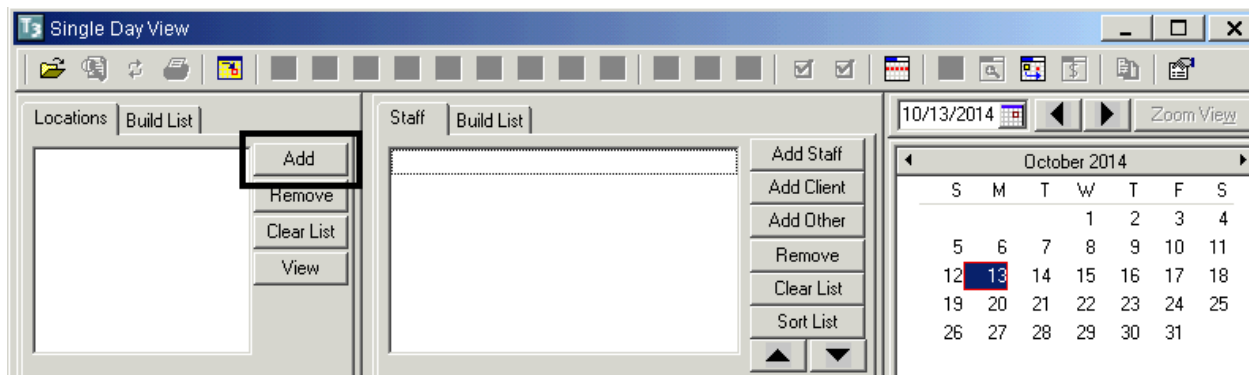
- Check the box next to the location you wish to view, and click "Build"

- Click "Add Staff"

- A list of staff members associated with the selected location displays. Check the boxes next to the desired staff, and click "Save"
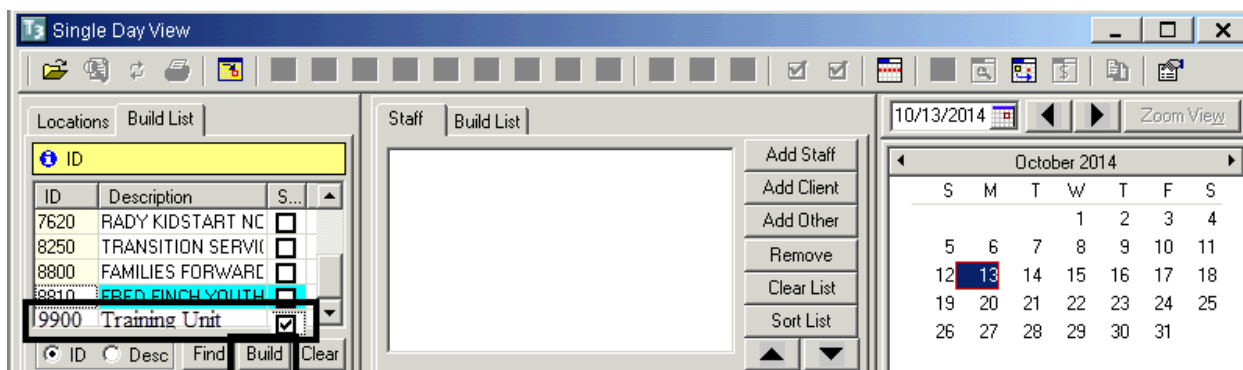
- Staff names can be moved up and down, which corresponds to left and right in the grid below. To move a particular staff name to the left, click the staff name and click the up arrow. To move a particular staff name to the right, click the staff name and click the down arrow
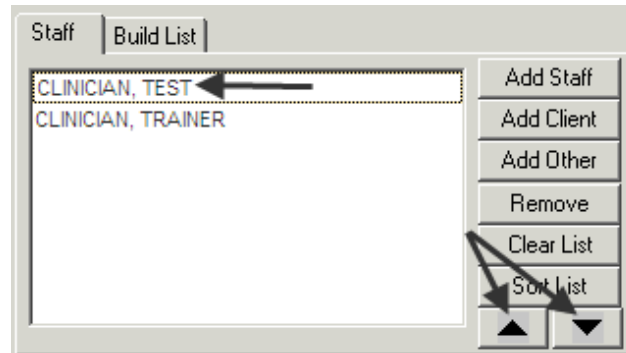
CREDENTIAL FILTERS

- To view staff members schedules based on credentials, click "Build List"
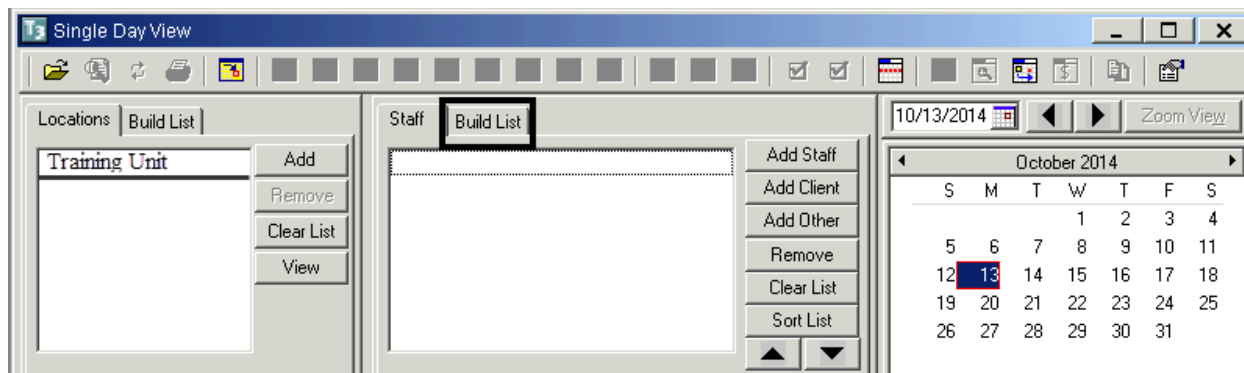
- Click "Load".
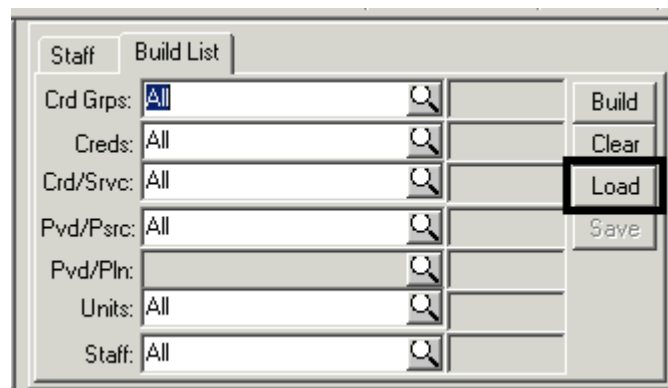
- Click the desired credentials and click "OK"
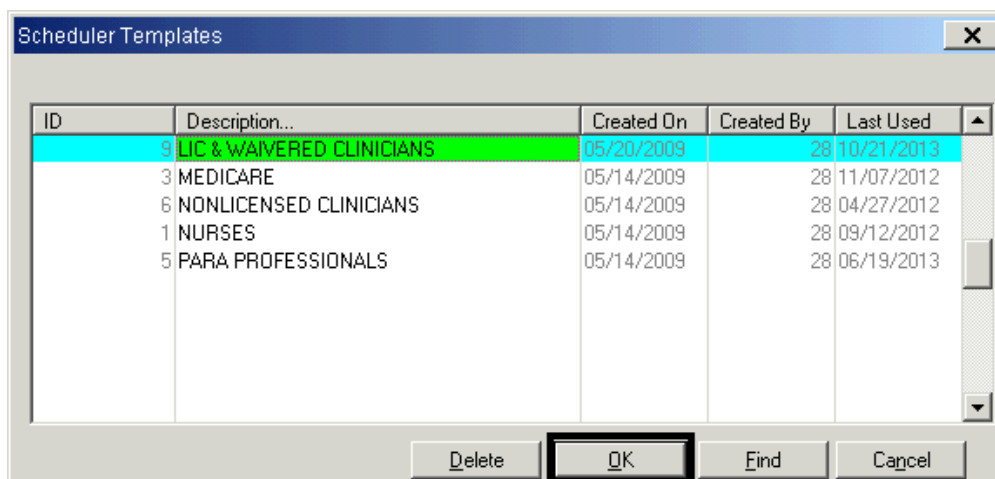
VIEW OPTIONS

- Click the View Options icon

- Check the box next to "Display Cancelled Events", and click "User Interface"
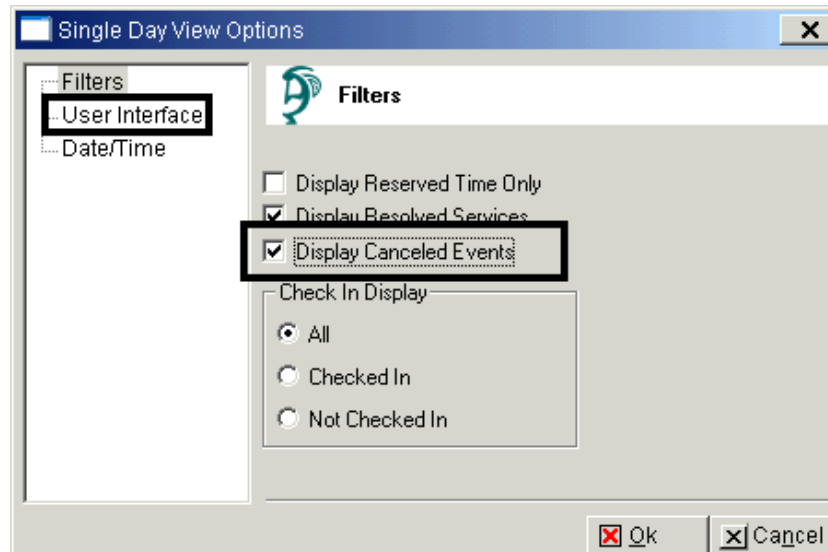
- For the "Number of Columns", choose the desired number of staff you wish to view
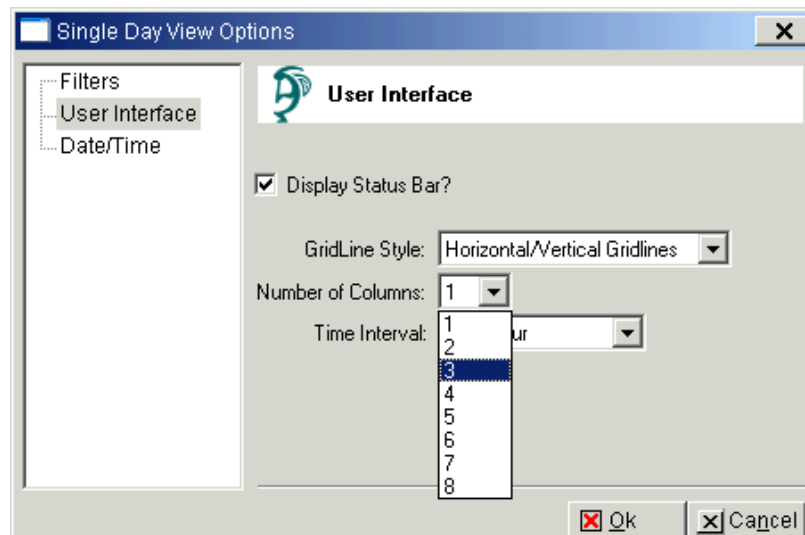
- For the "Time Interval" choose the interval that represents the shortest service event your program offers (i.e. the program does not schedule services less than 20 minutes in length). Click "OK"
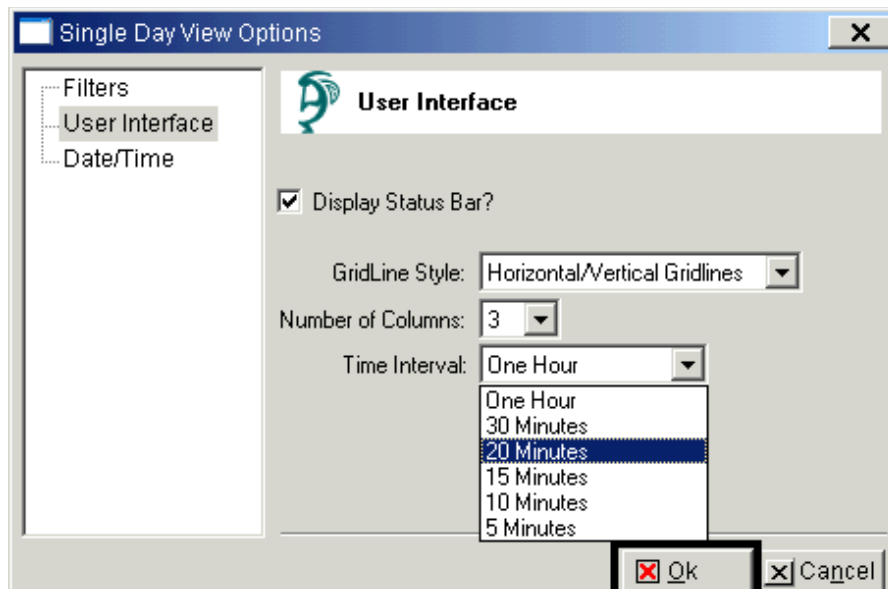
RESERVE TIME MAINTENANCE

Reserve time allows you to set aside time for intakes, assessments, on call, triage, etc. NOTE: Staff do not have rights to delete reserve time. If reserve time must be deleted, call the OptumHealth Support Desk. Staff should not schedule reserve time more than 90 days in advance.

- Click the "Scheduler" menu, "Scheduler Setup", and "Reserved Time Maintenance"
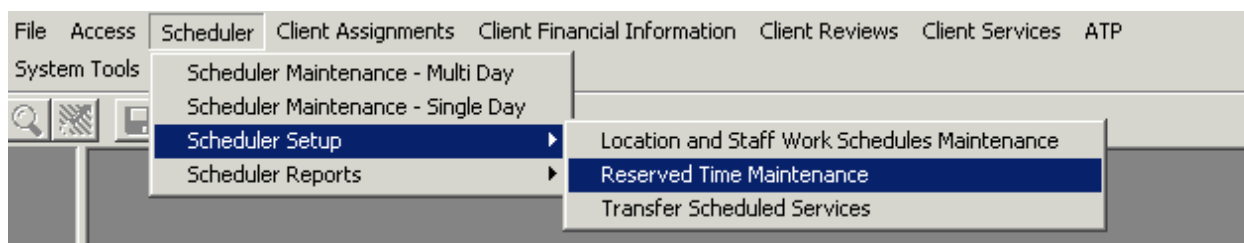
- To view reserve time that has already been scheduled, adjust the filters accordingly

- To enter reserve time, click in the first open date cell, enter the date, and click the magnifying glass in the "Reserved" column

- Click the desired reserve time type, and click "OK"
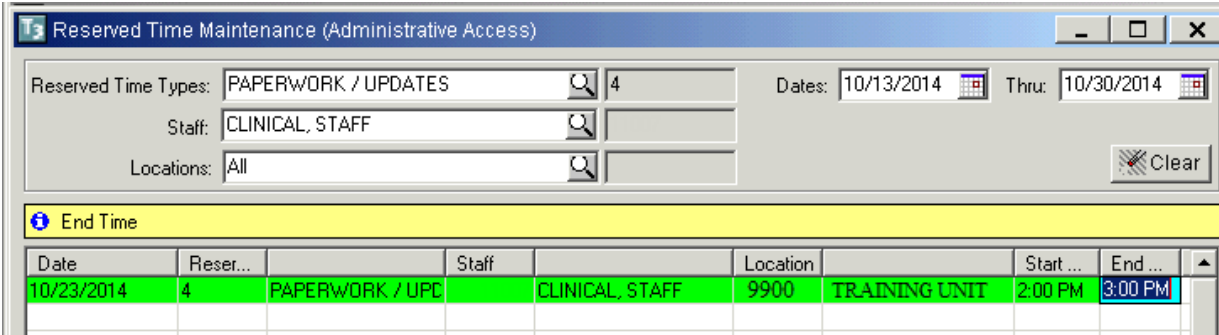
- Enter the necessary information in the remaining fields, and tab to the next row to save

RECURRING RESERVE TIME MAINTENANCE

- Click the row you wish to recur, and click "Recur"

- Set the Rules of Recurrence as desired, and click "Build"

FINDING AN OPEN TIME SLOT TO LOCATE

RESERVE TIME MAINTENANCE

- To locate reserve time, click the "Find An Open Time Slot" icon on the menu bar of the single day view

- Enter the desired information and click "Find"

- The date on the single day view calendar changes according to the selections chosen; however, the actual time slot is not automatically selected

FINDING AN OPEN TIME SLOT

For staff who are booked solidly for weeks in advance, you can search for available time.

- Click the "Find An Open Time Slot" icon on the menu bar of the single day view

- Enter the desired information and click "Find". NOTE: Leave "Reserved Type" blank

- The date on the single day view calendar changes accordingly; however, the actual time slot is not automatically selected

TRANSFERRING SCHEDULED SERVICES

The "Transfer Scheduled Services" utility transfers selected services from one staff's schedule to another.

- Click the "Scheduler" menu, "Scheduler Setup", and "Transfer Scheduled Services"
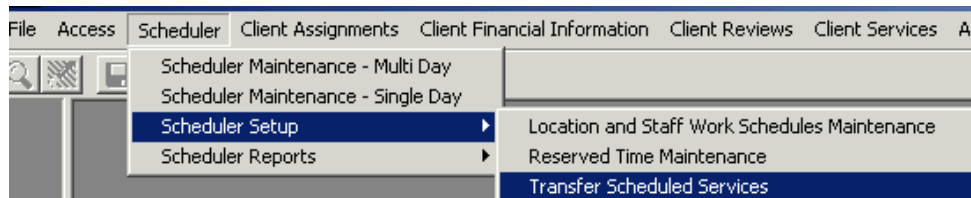
- Enter the desired staff in the fields on the left
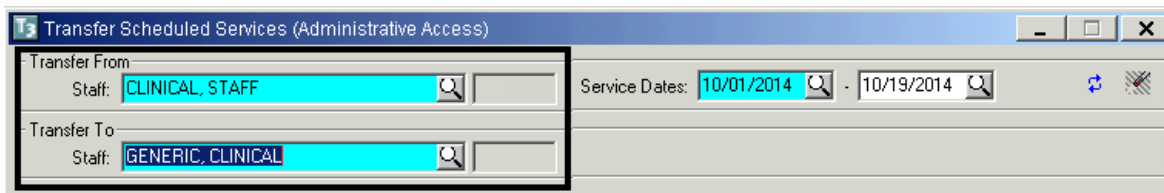
- Enter the service dates in the fields on the right
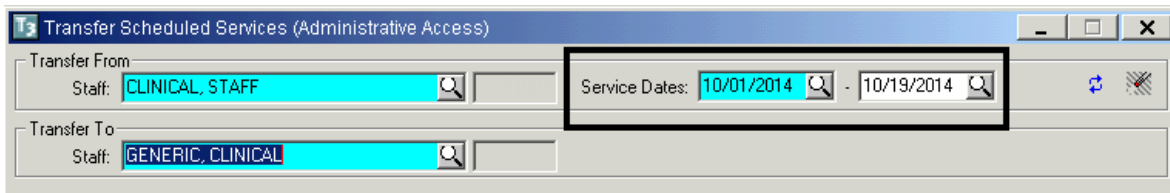
- Check the box(es) next to the services you wish to transfer and Click "Transfer"
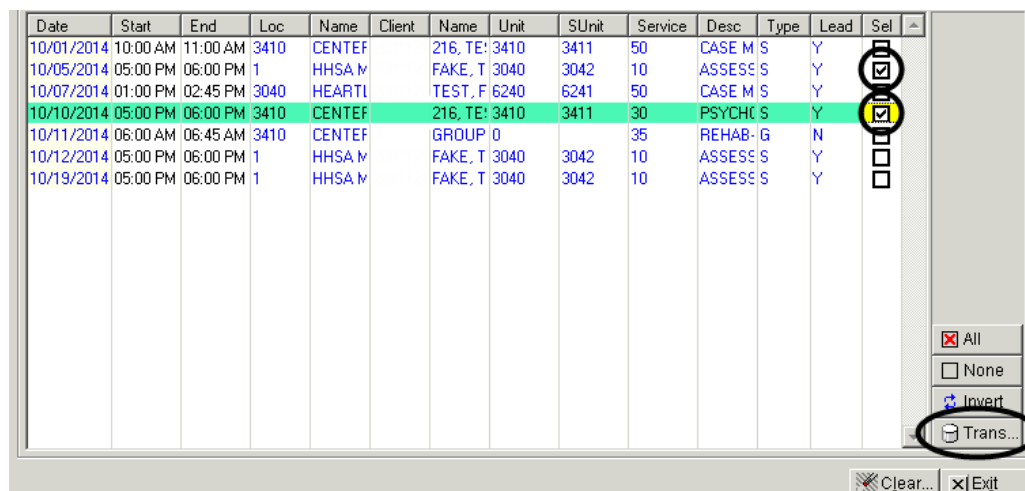
- The "Transfer" dialog box appears. Click "Yes"
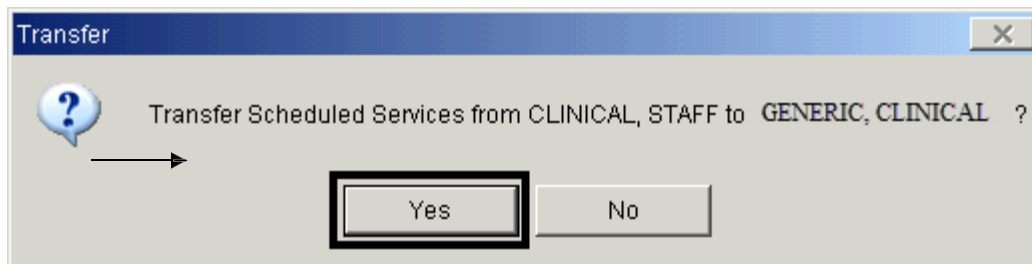
- The "Warnings and Errors" dialog box appears. Click "Cancel". NOTE: "Errors" will not transfer, but "Warnings" will
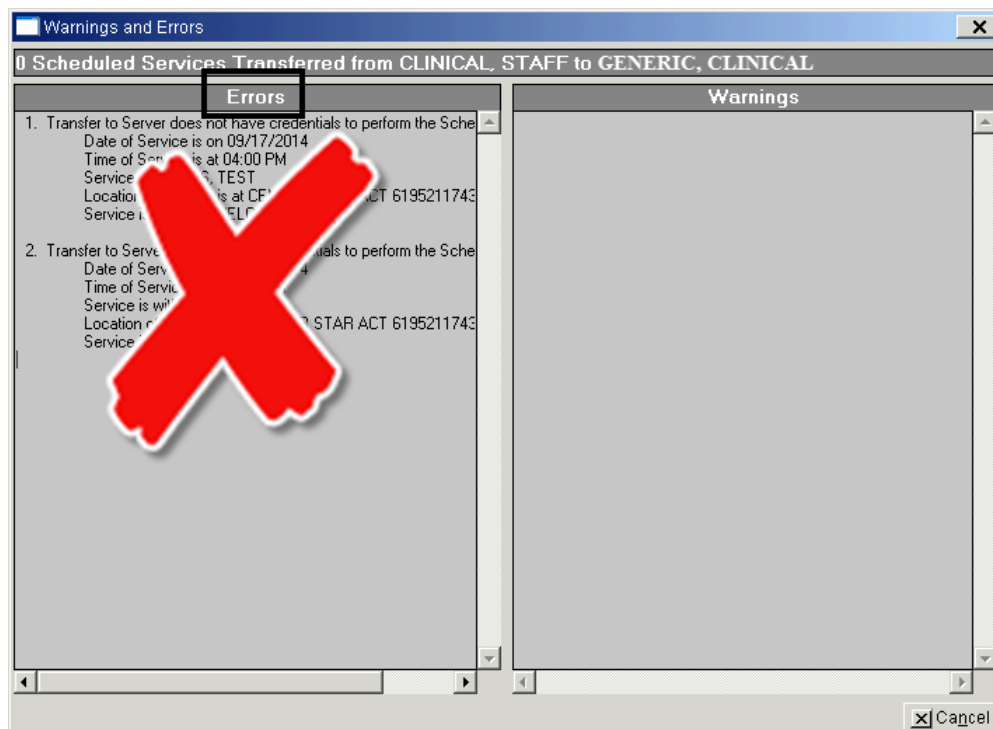
NEW GROUP SERVICE EVENT

- Right click in the column of the day to be scheduled. Click "New Group Service" from the drop down menu
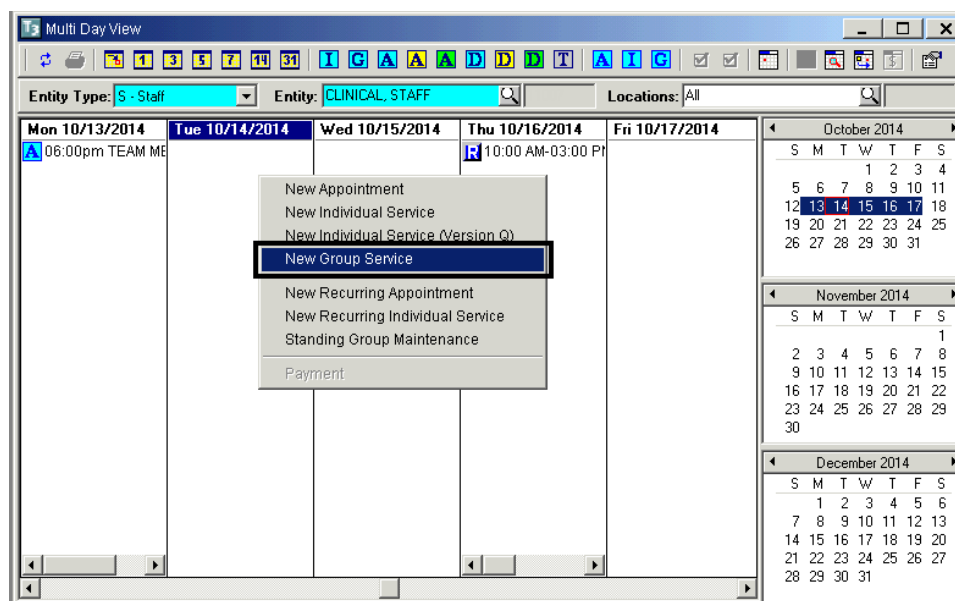
- An "Add/Edit Group Service Scheduled for [Staff Person's Name]" screen appears. On the "Subject" line, enter the name of the group. If no information is entered into the "Subject" line, it will default to the service code description after the first server is saved

- For a "Normal" appointment event, enter the "Start Time" followed by an "A" (or "a") for a.m. or "P" (or "p") for p.m. and the duration of the event (i.e. if the length of the event is 1 hour and 45 minutes, enter 1:45). This populates the "Stop Time"

- Enter the "Unit" and the "Location" field automatically fills. Enter the "SubUnit"

- Enter any comments regarding the group in the "Comments" field, and click "Save". The lower containers activate

- The "Staff" field defaults to the entity selected; however, if desired, the staff person can be changed. Select the intended "Service" for the scheduled event from the drop down menu

- Once a service code is selected, the service code indicators autofill. If the "Prov. At" (place of service) is different than the default, enter the correct "Prov. At" from the drop down menu

- Enter an "Outside Facility" if "K", "D", or "S" is selected as the "Prov. At). Other service indicators can be changed if desired

- If the staff person in the staff field is the lead staff, mark the "Lead Staff during time period?" check box. Click "Save". Add additional staff as needed

- Add clients and click "Save"

- Repeat to add additional clients. Edit any fields that are specific to the client before saving. When all clients are added click "Exit"

EDIT GROUP SERVICE EVENT

- Right click on the group service to be edited, and click "Edit Group Service" from the drop down menu

- An "Add/Edit Group Service Scheduled for [Staff Person's Name]" screen appears

- Make the appropriate change(s) to the top container and click "Save"

- Make any appropriate change(s) to the "Server" container and click "Save"

- Make any appropriate change(s) to the "Client" container and click "Save"

- When the "Update Attendee and Calendar Records?" dialog box appears, click "Proceed with Save"

- If there is a schedule conflict, the "Schedule Conflict" dialog box appears. Click "Yes" to save changes or "No" to review and correct before saving

- If no other changes are required, select "Exit"

NOTE: A scheduled group service cannot be edited to become a "Standing Group"

CANCELLING ONE CLIENT IN A GROUP

- Right click on the group event, and click "Edit Group Service"

Sun 09/28/2014	Mon 09/29/2014	Tue 09/30/2014	Wed 10/01/2014	Thu 10/02/2014

G

New Appointment
New Individual Service
New Individual Service (Version Q)
New Group Service

New Recurring Appointment
New Recurring Individual Service
Standing Group Maintenance

Edit Group Service
Show Group Service
Launch Billing Pro Forma
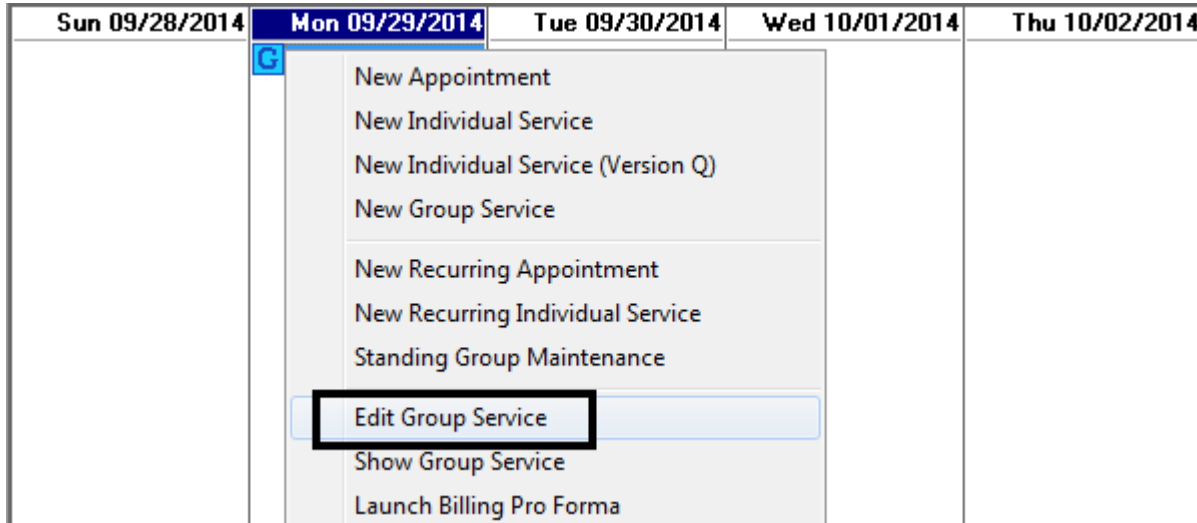
NOTE: If "Cancel" is selected from the drop down menu instead of "Edi Group Service", there is a risk of cancelling the entire group

- The service screen appears. Click on the client you wish to cancel so that it is highlighted, and click "Cxl"
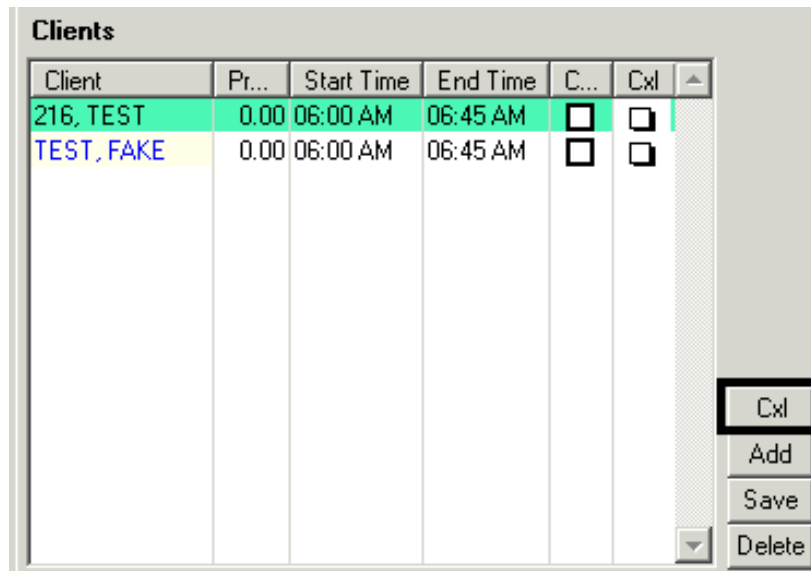
Clients

Client	Pr...	Start Time	End Time	C...	Cxl
216, TEST	0.00	06:00 AM	06:45 AM	☐	☐
TEST, FAKE	0.00	06:00 AM	06:45 AM	☐	☐

Cxl
Add
Save
Delete

- The "Cancel Service" dialog box appears. Click the magnifying glass to access the "Cancellation Reason" table

Revised 04.2017

Cancel Service ✕

Cancel Group Service for TEST, FAKE on 09/27/2014 at 06:00 AM?

Cancellation Reason [   ] 🔍 [   ]

[Yes]   [No]

- Click on the appropriate "Cancellation Reason", and click "OK"

Cancellation Reasons Lookup ✕

ID	Description
3	Cancelled by Client
4	Cancelled by Program
7	Left Before Service Provided
5	No Show

◉ Active   ○ Inactive   ○ All   [Find...]   [OK]   [Cancel]

- Click "Yes" to confirm the cancellation

Cancel Service ✕

Cancel Group Service for TEST, FAKE on 09/27/2014 at 06:00 AM?

Cancellation Reason [Cancelled by Client] 🔍 [3]

[Yes]   [No]
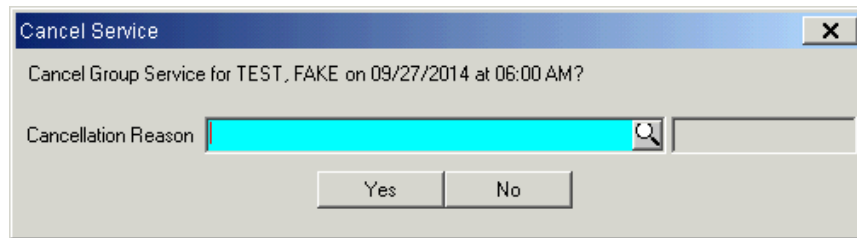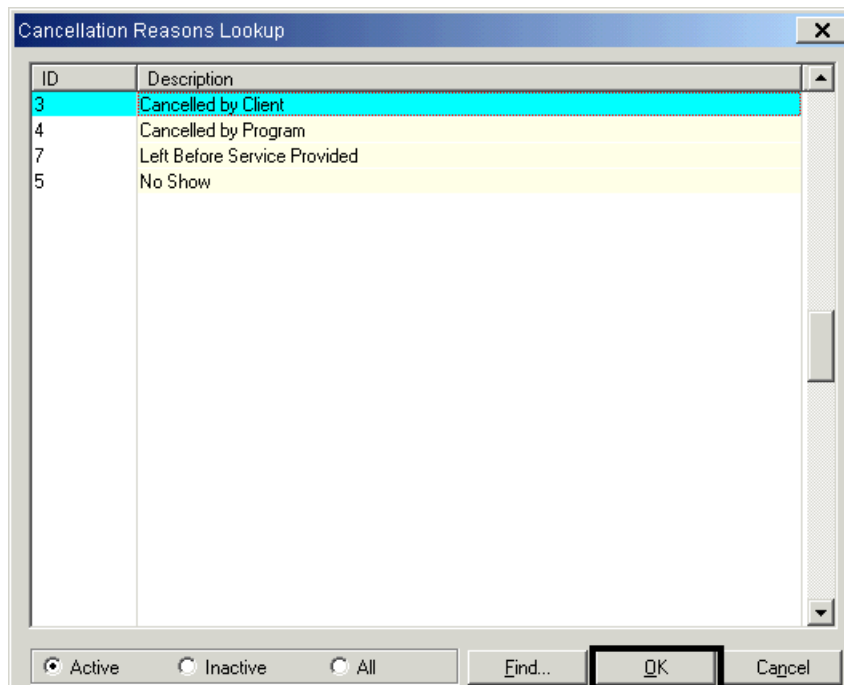
- When there are multiple clients in the group, a yellow message box appears confirming that the client was cancelled. Click "Save"

- The pink checkmark appears in the "Cxl" column next to the client's name. Click "Exit" to return to Scheduler Maintenance- Multi Day

UNCANCELLING ONE CLIENT IN A GROUP

NOTE: The only reason you would uncancel is if you cancelled by mistake

- Right click on the group event, and click "Edit Group Service" from the drop down menu
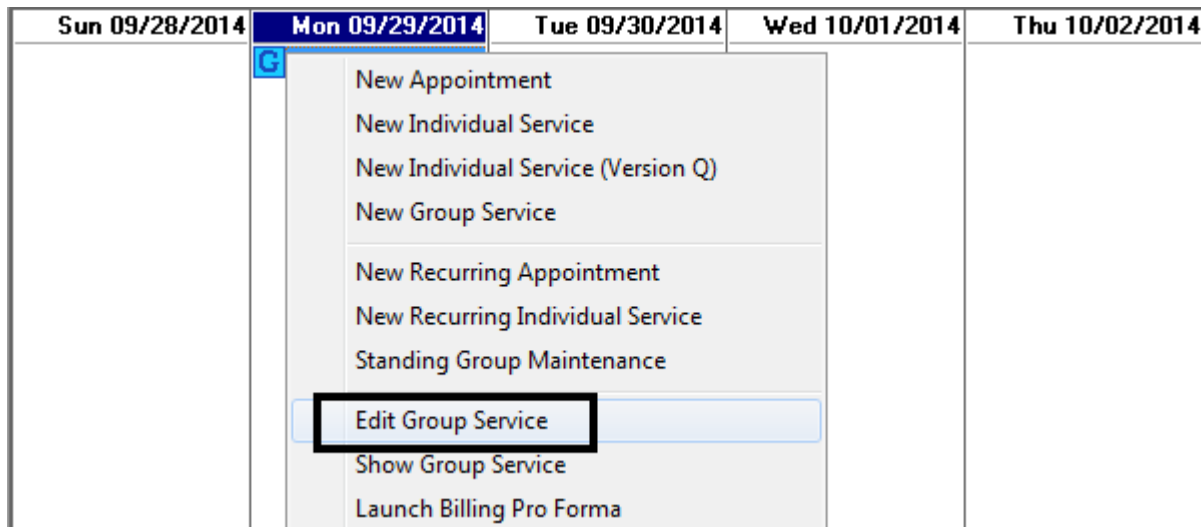
- The service screen appears. Highlight the name of the client you wish to uncancel. Click the "Un-Cxl" button found above the "Add" button

- The "Continue" dialog box appears. Click "Yes"

Continue?

? Uncancel Service for TEST, FAKE on 09/20/2014 at 06:00 AM?

Continue?

[Yes]   [No]
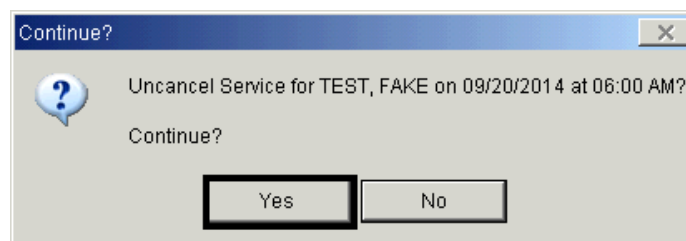
- The pink checkmark in the "Cxl" column next to the client's name disappears. Click "Exit" to return to Scheduler Maintenance- Multi Day

Clients

Client	Pr...	Start Time	End Time	C...	Cxl
216, TEST	0.00	06:00 AM	06:45 AM	☐	☐
TEST, FAKE	0.00	06:00 AM	06:45 AM	☐	☐

Client: TEST, FAKE

Unit: TRAINING UNIT   9900   Assign Unit

SUnit: TRAINING SUBUNIT   9901   9900/9901

☐ Transportation Required

Prov. To: Client and Family   B   Start/Dur/Stop

Prov. At: Other Community/Field Unspec   0   6:00 AM

Out. Fac: 0   0:45

Con. Type: Face to Face   F   6:45 AM

App. Type: Scheduled   1   EBP/SS

Bill. Type: Not Applicable   X

Int. Type: NOT APPLICABLE   N

Cxl
Add
Save
Delete

Resolve Group   Cancel Group   Post Group   Billing Pro Forma   Event Log   Print   Payment   Exit

CANCELLING THE ENTIRE GROUP SERVICE EVENT

- Right click on the group service you wish to cancel, and click "Cancel" from the drop down menu
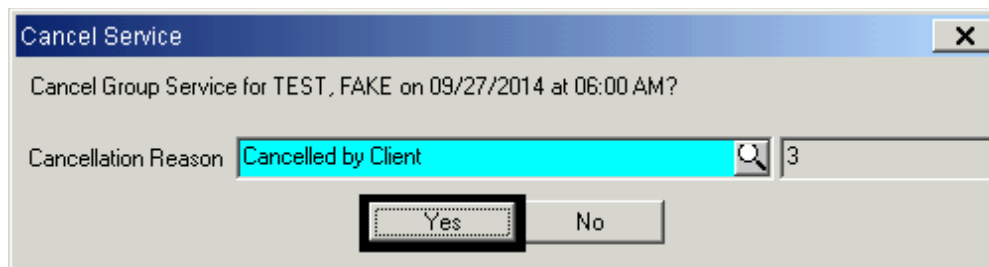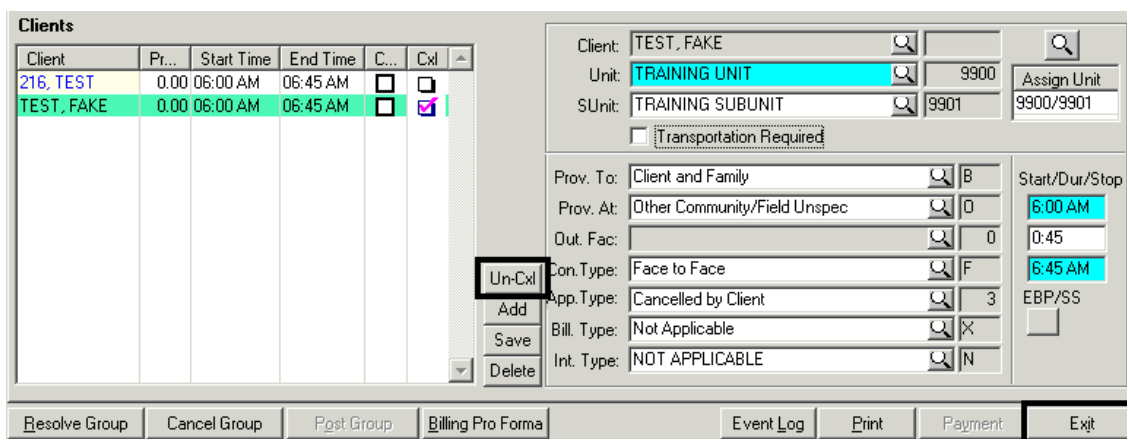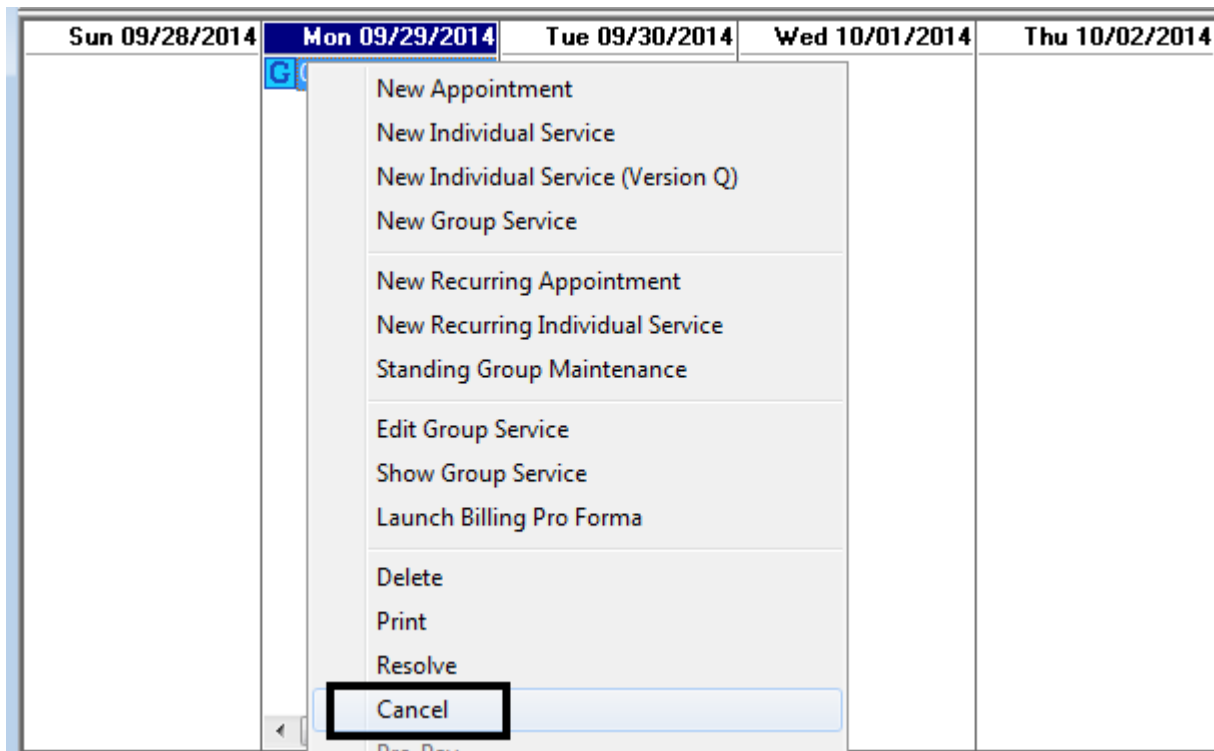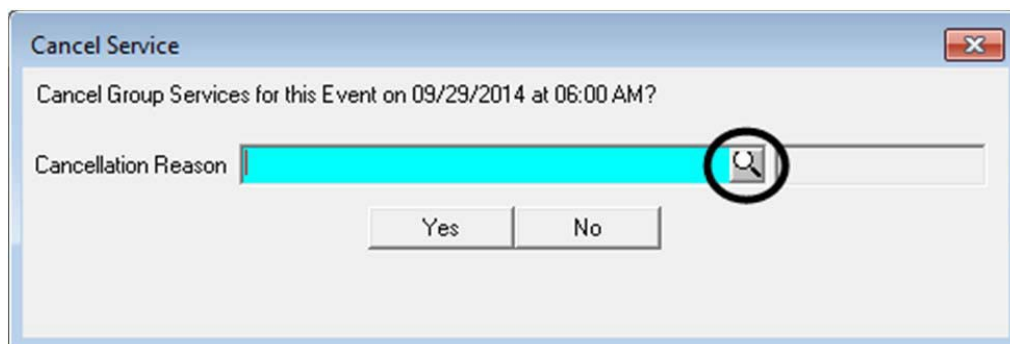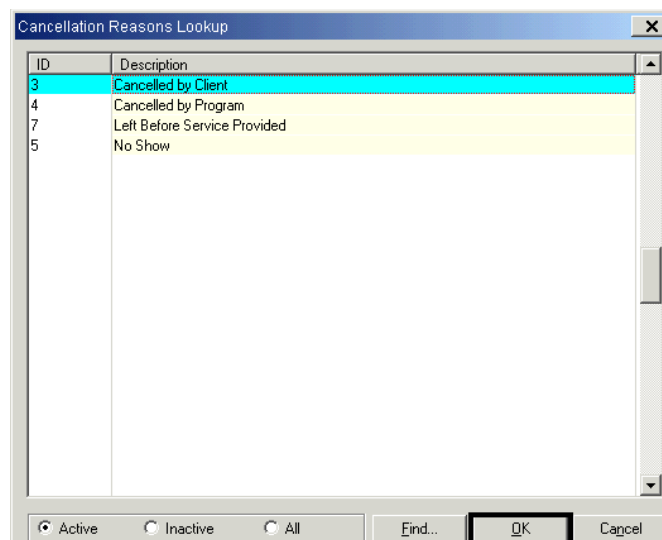

- The service screen and the "Cancel Service" dialog box appear. Click the magnifying glass to access the "Cancellation Reason" table
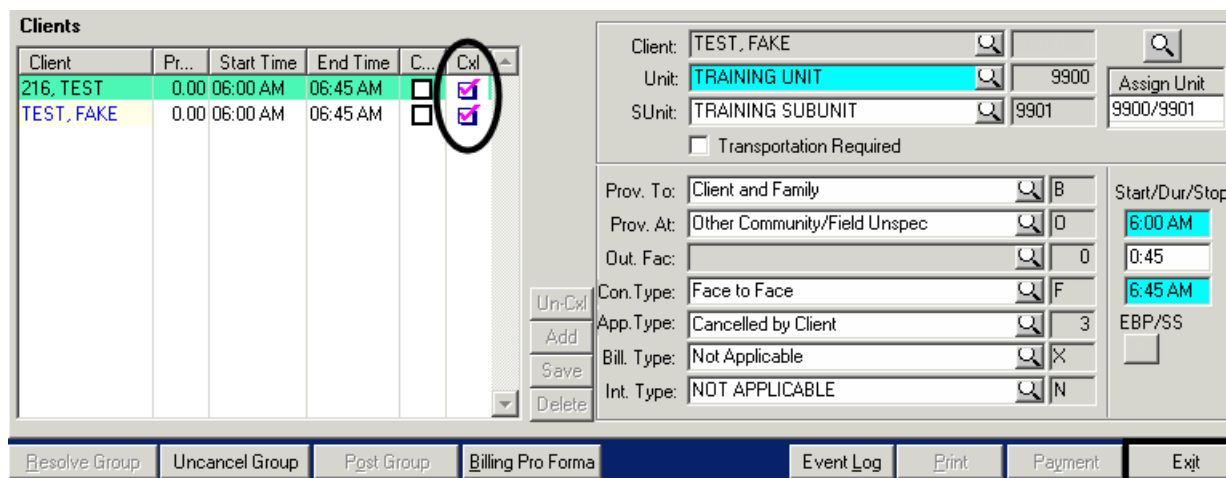
- Click on the appropriate "Cancellation Reason" and click "OK"

- Click "Yes" to confirm the cancellation
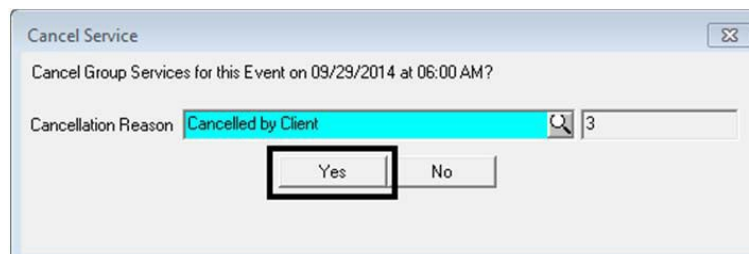
- In the "Client" container, pink checkmarks appear in the "Cxl" column next to each client's name. Click "Exit" to return to Scheduler Maintenance- Multi Day. The service event is removed from the calendar

UNCANCELLING THE ENTIRE GROUP SERVICE EVENT

NOTE: The only reason you would uncancel is if you cancelled by mistake

- Right click on the service you wish to uncancel. Click "Cancel" from the drop down menu
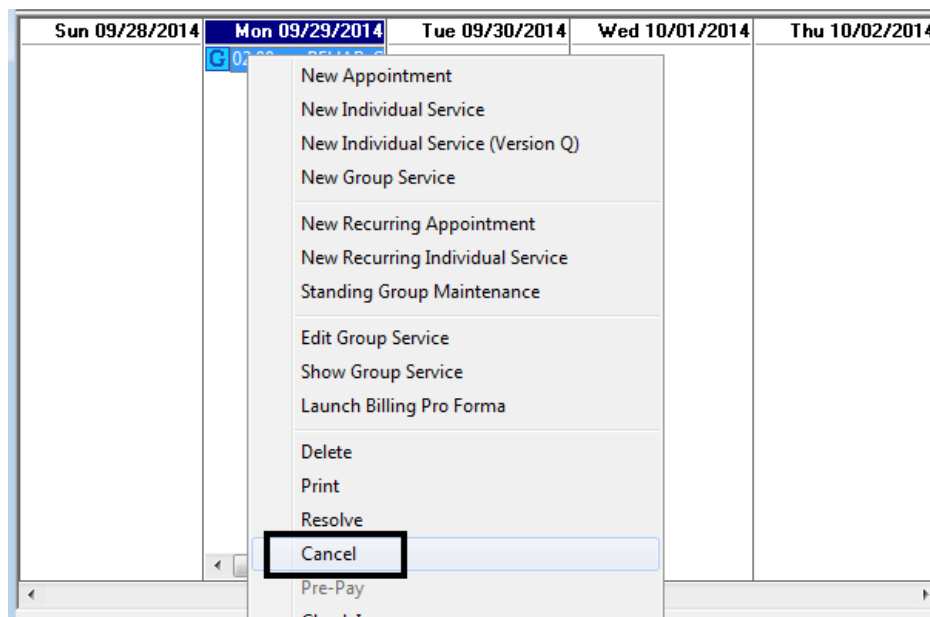
- The service event screen appears. The pink checkmark automatically disappears from the "Cxl" column next to the client's name
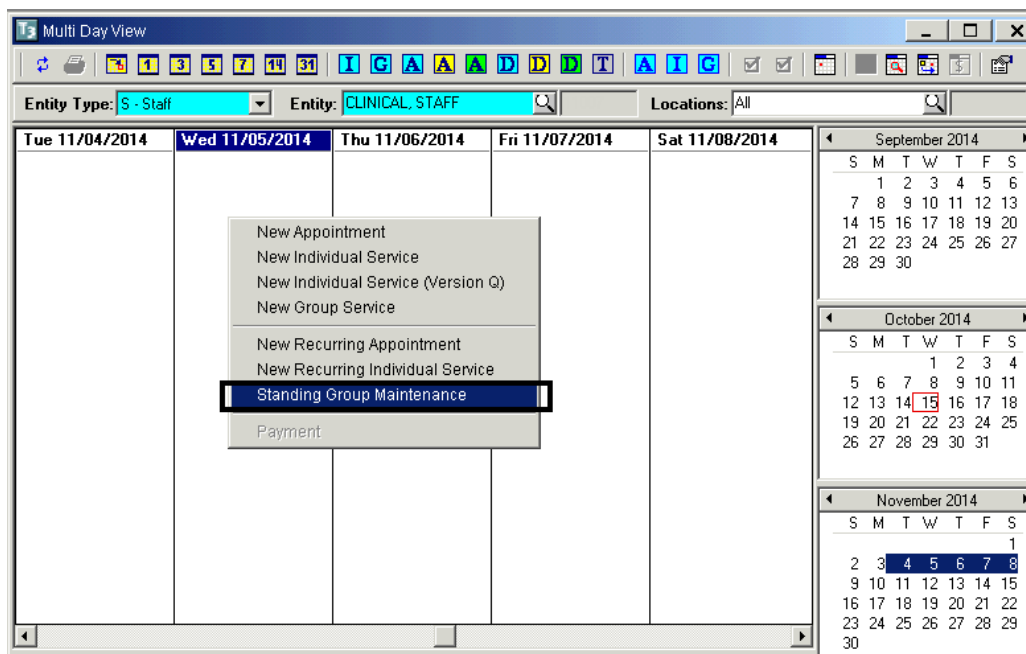- Click "Exit" to return to Scheduler Maintenance- Multi Day

Revised 04.2017

- The service event appears on the schedule with the pink X removed, which indicates that the service has been uncancelled

STANDING GROUP MAINTENANCE (NEW)

- Right click in the column of the day to be scheduled, and click "Standing Group Maintenance"

- An "Add/Edit Standing Group" screen appears

Revised 04.2017

- To create a new group, type a group ID in the "ID:" field. The group ID is the unit number followed by a three character abbreviation (i.e. 9900ART). Press the tab key on the keyboard and additional fields will open

- Enter the "Unit", "SubUnit", "Location", and "Slots" (ideal number of clients for this group). Any additional information may be entered in the "Comments" field. Click "Save"

- Click "Rules of Recurrence"

- Complete the prompts by entering the appropriate information, and click "Build".

NOTE: The "Start Date" of the recurring appointment must be the date of the first scheduled appointment. **Do not exceed 90 days when setting the "Rules of Recurrence" in the "End After" or "End By" fields**

Revised 04.2017

- The "Schedule" tab activates on the "Add/Edit Standing Group" window. Click "Edit Group"

- The "Add/Edit Group Service" screen activates. Enter the necessary information in the top container, "Servers" container, and "Clients" container
- Once finished, click "Exit"

- The "Schedule" tab on the "Add/Edit Standing Group" window activates

- To copy the staff and clients from the first date into the remaining dates, mark the check box in the "Select" column for the first date. The "Copy for Paste" button activates. Click "Copy for Paste"

- The "Select All for Paste" button activates. Click "Select All for Paste"

- The remaining check boxes in the "Select" column are automatically checked. The "Paste from Copy" button activates. Click "Paste from Copy"

- The staff, clients, service code, etc. from the initial group set-up are now copied to the remaining recurring groups. Click "Cancel". This automatically applies the rules of recurrence and includes clients for the group on the staff schedule(s)

Startdate	Day	Starttime	Endtime	Available	Select
11/05/2014	WEDNESDAY	04:00 PM	06:00 PM	☐ 8	☐
11/12/2014	WEDNESDAY	04:00 PM	06:00 PM	☐ 8	☐
11/19/2014	WEDNESDAY	04:00 PM	06:00 PM	☐ 8	☐

Add/Edit Standing Group (Administrative Access)

Main | Schedule

ID: 9900ART Description: 9900 ART THERAPY CLASS Slots: 10

◉ Unresolved Only ○ All Copy Date: [   ] Add Group Edit Group

Copy for Paste | Select All for Paste | Paste from Copy | Delete Selected | Deselect All

Rules of Recurrence | Cancel

STANDING GROUP MAINTENANCE (EXISTING)

NOTE: When editing from the "Standing Group Maintenance Screen", never change the description of the group

- To reuse a group ID and description, right click on any date and select "Standing Group Maintenance" from the drop down menu
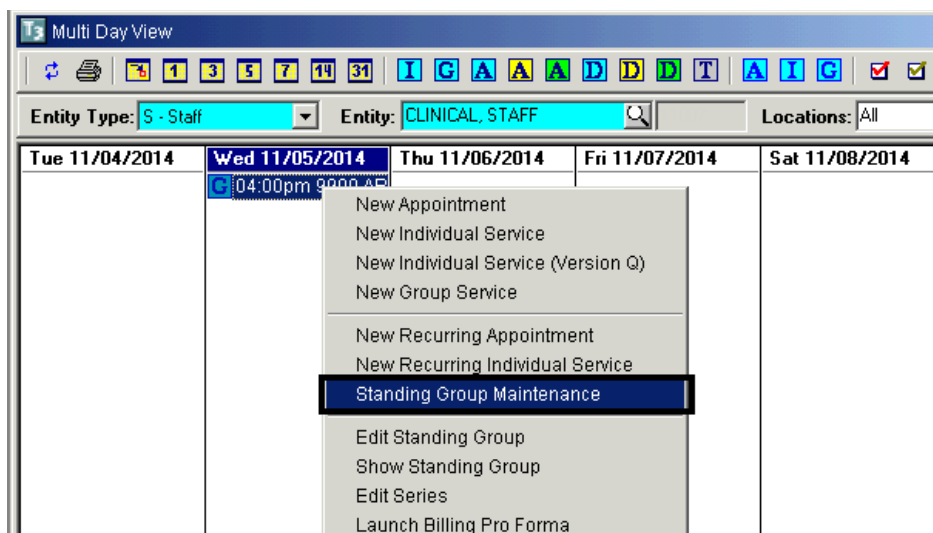
- The "Add/Edit Standing Group" screen appears. Enter the ID of the group and press the tab button on the keyboard. The fields will populate with the group information

- Click on the "Schedule" tab, and click on "Rules of Recurrence"

- Enter a start date that does not overlap with a previous date for that group. Fill in the remaining fields as appropriate and click "Build"

- To copy the clients and staff to the new dates, select the date you wish to copy, and mark the check box. The "Copy for Paste" button activates. Click "Copy for Paste"

Revised 04.2017

- Mark the check boxes for the dates you wish the copy the information into. Click "Paste from Copy"

- The staff, clients, service code, etc. from the initial group set-up are now copied to the new recurring groups. Click "Cancel". This automatically applies the rules of recurrence and includes clients for the group on the staff schedule(s)

EDIT ONE GROUP SERVICE EVENT

- Right click on the Standing Group in the staff person's schedule, and click "Edit Standing Group"
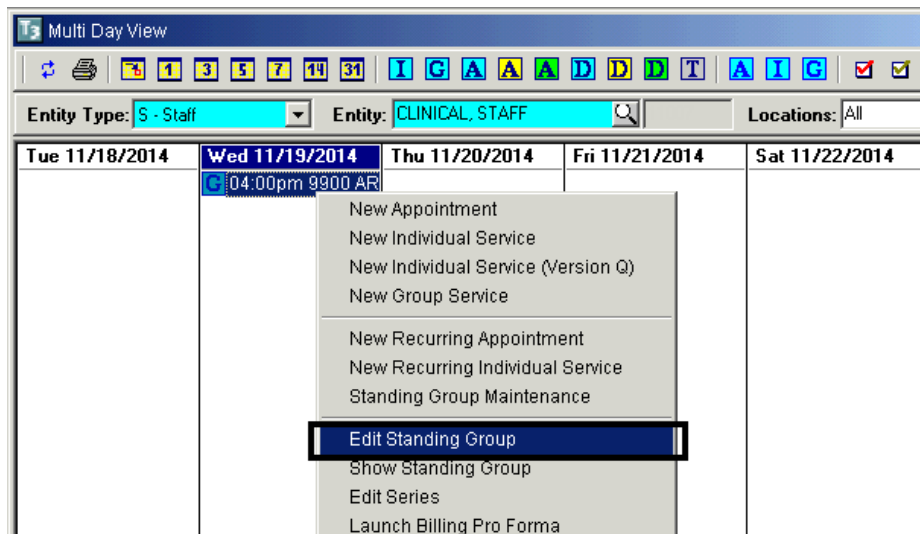
- The "Add/Edit Group Service" screen appears. Make the appropriate changes, click "Save", respond to the dialog box, and then click "Exit"

Revised 04.2017

- If the "Schedule" tab is reopened. (Right click, "Edit Series"). It is observed that the changes are only applied to the selected group. Click "Cancel"
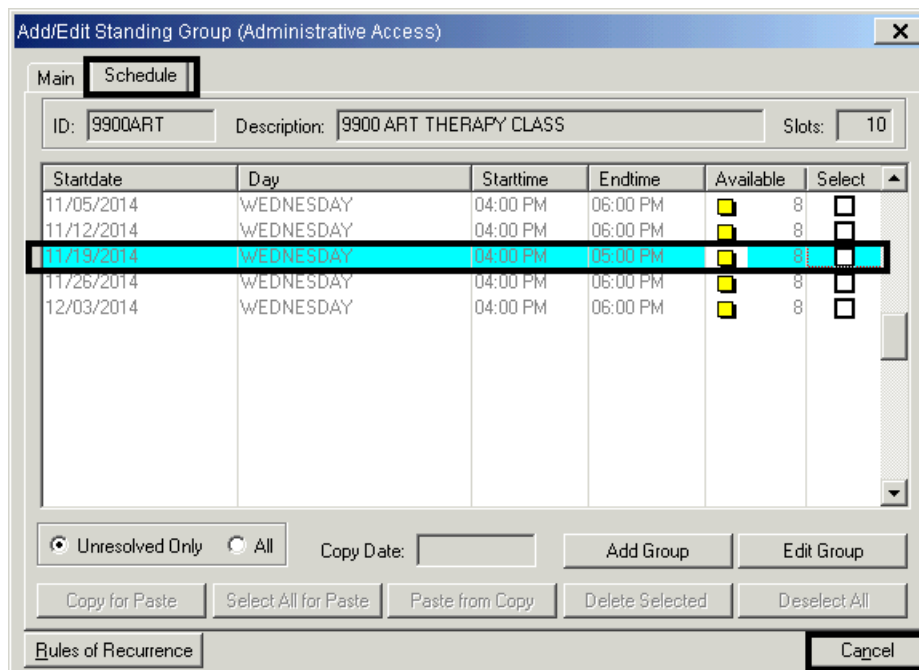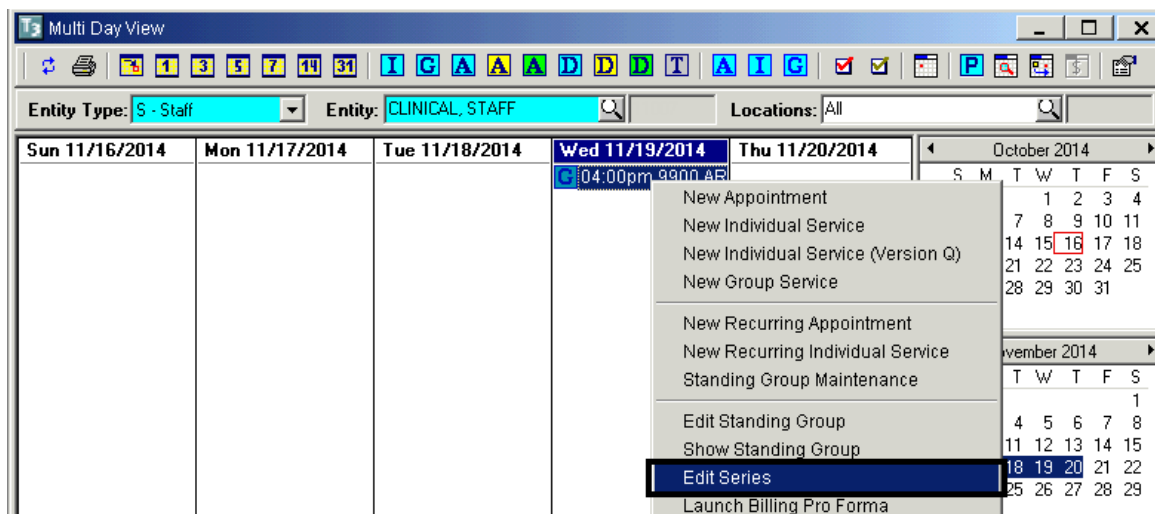
EDIT SERIES OF GROUP SERVICE EVENTS

NOTE: When editing a standing group, do not select the "Rules of Recurrence" button because you will create a new group instead of editing the existing group

NOTE: When editing a standing group, do not change the description of the group because the series will disappear

- Right click on the Standing Group in the staff person's schedule, and click "Edit Series"

- The "Add/Edit Standing Group" screen appears. Click on the "Schedule" tab

- The list of scheduled groups displays. Click the date of the group to be edited, and click "Edit Group"

- The "Add/Edit Group Service" screen appears. Make the appropriate changes, click "Save", and click "Exit"

- The "Schedule" tab reopens. To replicate the same changes to other dates, select the date of the changed group from the list, and mark the check box. The "Copy for Paste" button activates. Click "Copy for Paste"

- The "Select All for Paste" button activates. Click "Select All for Paste"

- The remaining check boxes in the "Select" column are automatically checked. The "Paste from Copy" button activates. Click "Paste from Copy"

- The staff, clients, and service code from the initial group set-up are now copied to the remaining recurring groups. Click "Cancel"

NOTE: If an event in a series has previously been changed and staff makes a change to another event in the series and copies that change to the rest of the series, the change made to the first event will be lost. The new change must be copied to only the events of the series that have not been altered. Previous changed events must be individually edited with the new information. Because of this, it is recommended that only one person per program manages standing groups

RECUR EXPIRED STANDING GROUP

- Right click on the Standing Group in the staff person's schedule, and click "Edit Series"

- Click "Rules of Recurrence"

- Enter a start date that does not overlap with a previous date for that group. Fill in the remaining fields as appropriate and click "Build"

- Check a box next to an existing group service event, click "Copy for Paste", "Select All for Paste", and "Paste from Copy". Click "Cancel"

CHECK IN/CHECK OUT GROUP

To check in a client in a group:

- Right click on the group service event, and click "Check In"

- Check the box next to the client who has arrived for the service event, and click "Check In"

To check out a client in a group:

- Right click on the group service event, and click "Check In"

- Uncheck the box next to the client who has arrived for the service event, and click "Check In"

BILLING PRO FORMA GROUP

- Right click on a group service event and click "Launch Billing Pro Forma"
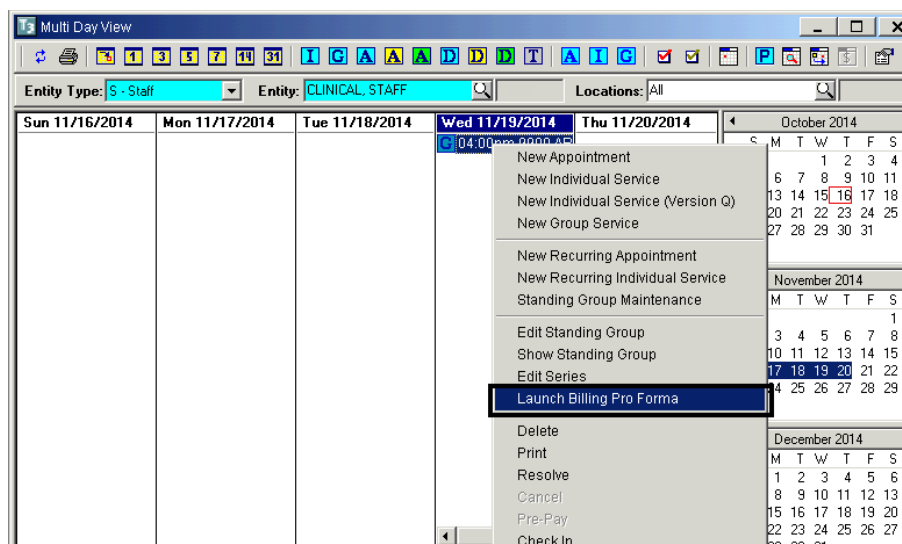
- Check the "Pro Forma" box next to the desired client(s) and click "Pro Forma"
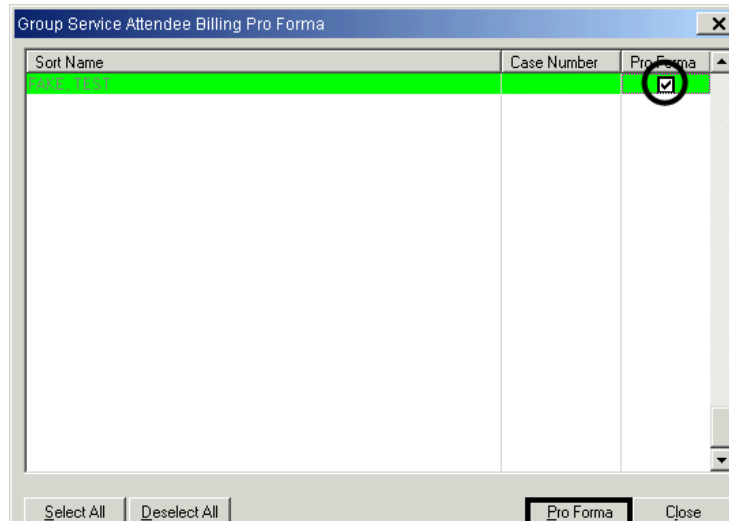
- The dialog box appears. Once you are done viewing, click "OK"

Billing Pro Forma Dialog ☒

| Client: | TEST, FAKE | | Admitted | Date: | 10/21/2014 | Start: | 06:00 AM |
| SAI: | | | | Duration | 1:00 | Stop | 07:00 AM |

Unit:	TRAINING UNIT	9900
SubUnit:	TRAINING SUBUNIT	9901
Server:	CLINICAL, STAFF	
Supervisor:		
Service:	REHAB-GROUP 35	35
Lab:		
Quantity:	Fee:	Days

Provided To:	Client and Family	B
Provided At:	Other Community/Field Unspec	O
Contact Type:	Face to Face	F
Outside Facility:		
Appointment Type:	Cancelled by Client	3
Billing Type:	Not Applicable	X
Intensity Type:	NOT APPLICABLE	N

Insurance

Pay So...		Benefit ...		From

Authorizations

Auth#	P.	Procedure	From	Thru	Qty	Used

Billing Pro Forma

Testing Contract Pay Source 8999/8999
Determining Billing Information for NON BILLABLE FOR OSHPD, BEN
Service is not Covered by Benefit Plan 8999.
Looking up Client's Insurance Coverages.
Testing Contract Pay Source 8998/4010
Determining Billing Information for NON BILLABLE FOR LIHP, LIHP
Service is not Covered by Benefit Plan 4010.
Testing Contract Pay Source 8998/4105
Determining Billing Information for NON BILLABLE FOR LIHP, LIHP C
Service is not Covered by Benefit Plan 4105.
Testing Contract Pay Source 8998/4109

▲ Colla... OK

NOTE: If you are viewing the Billing Pro Forma for several clients, you will click "OK" for each client

PRINTING INSURANCE COVERAGE REPORT
FOR SCHEDULED CLIENTS

The "Scheduler Insurance Coverage Report" shows 3rd Party Coverage for scheduled clients. A template has been created for use.

To Access the Template:

- Click "Scheduler" on the menu bar
- From the drop down menu, click "Scheduler Reports"
- Click "Scheduler Insurance Coverage Report"
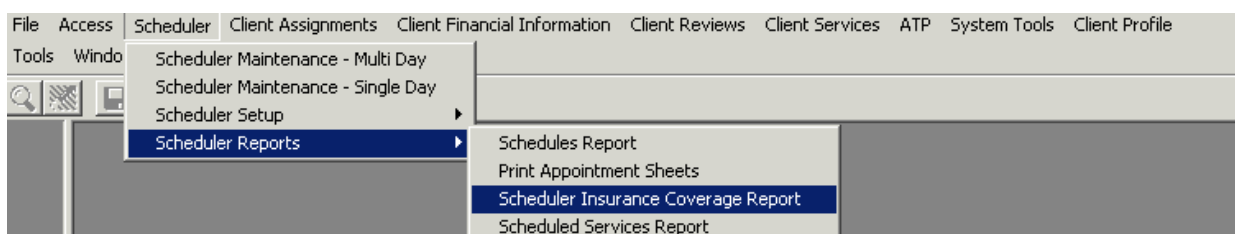
- The "Scheduler Insurance Coverage Report" dialog box appears. Click "Load"
- Click the "Insurance Coverage Client by Alpha" template
- Click "Load"

Selections 1 Tab

- Enter the unit number in the "Locations" field
- Enter the desired date range in the "Dates/Time" fields
- Click "Print" and choose your destination

NOTE: The report will sort by client name

PRINTING ONE STAFF PERSON'S SCHEDULE

The "Schedules Report" will print a staff person's schedule for a specific date range. A template has been created to use

To Access the Template:

- Click "Scheduler" on the menu bar
- From the drop down menu, click "Scheduler Reports"
- Click "Schedules Report"
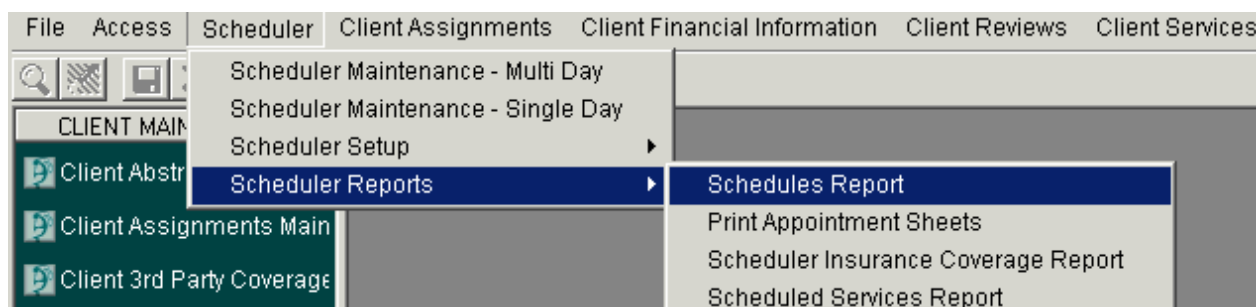
- The "Schedules Report" dialog box appears. Click "Load"
- Click the "Individual Staff Schedule" template
- Click "Load"
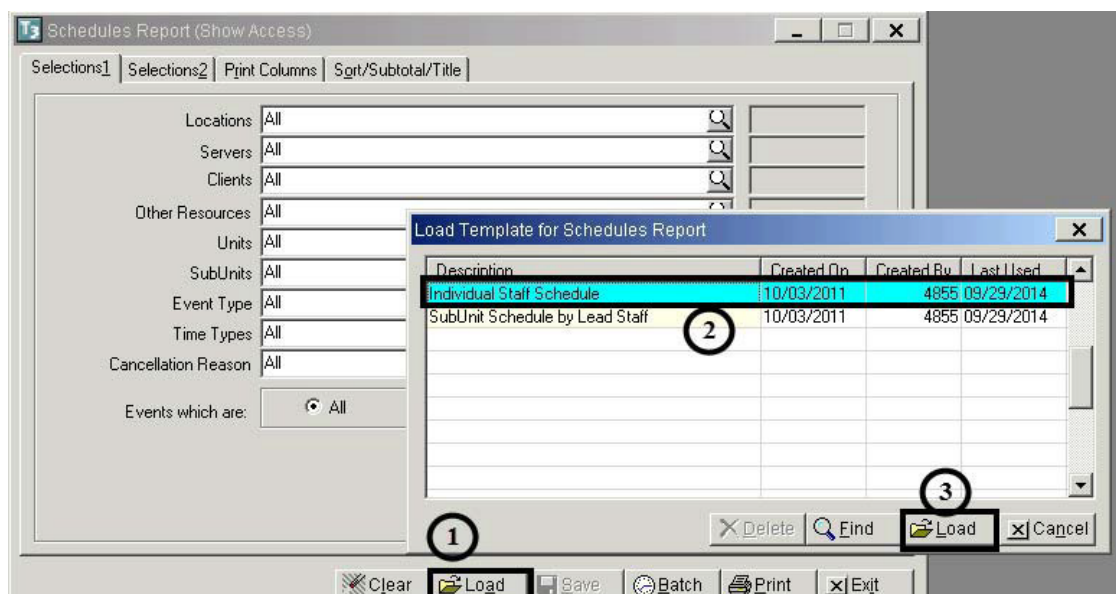
Selections 1 Tab

- Enter the unit number in the "Locations" field
- Enter the staff ID number in the "Servers" field

Selections 2 Tab

- Enter the desired date range in the "Dates/Time" fields
- Click "Print" and choose your destination

NOTE: This report includes all scheduled appointments. If the "C" column near the end of the report notes "N" (No), that means that the appointment has <u>not</u> been cancelled. A "Y" (Yes) notes that the appointment has been cancelled

PRINTING STAFF'S SCHEDULES FOR A LOCATION

The "Schedules Report" will print staff(s) schedules for a specific date range. A template has been created to use

To Access the Template:
- Click "Scheduler" on the menu bar
- From the drop down menu, click "Scheduler Reports"
- Click "Schedules Report"
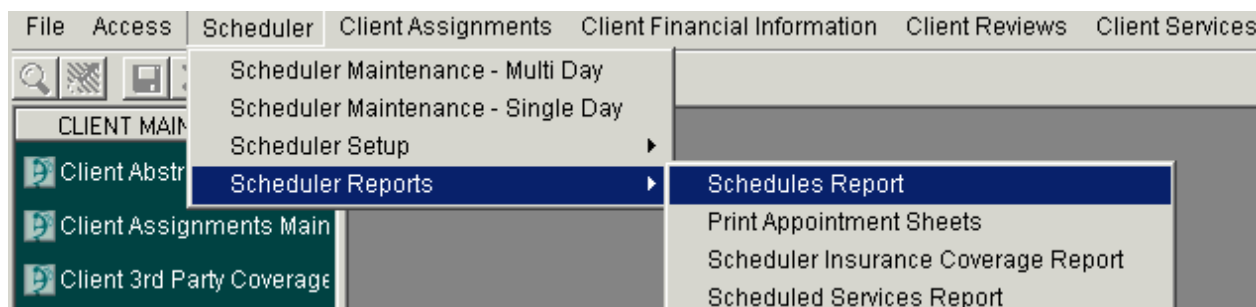
- The "Schedules Report" dialog box appears. Click "Load"
- Click the "Sub-Unit Schedule by Lead Staff" template
- Click "Load"
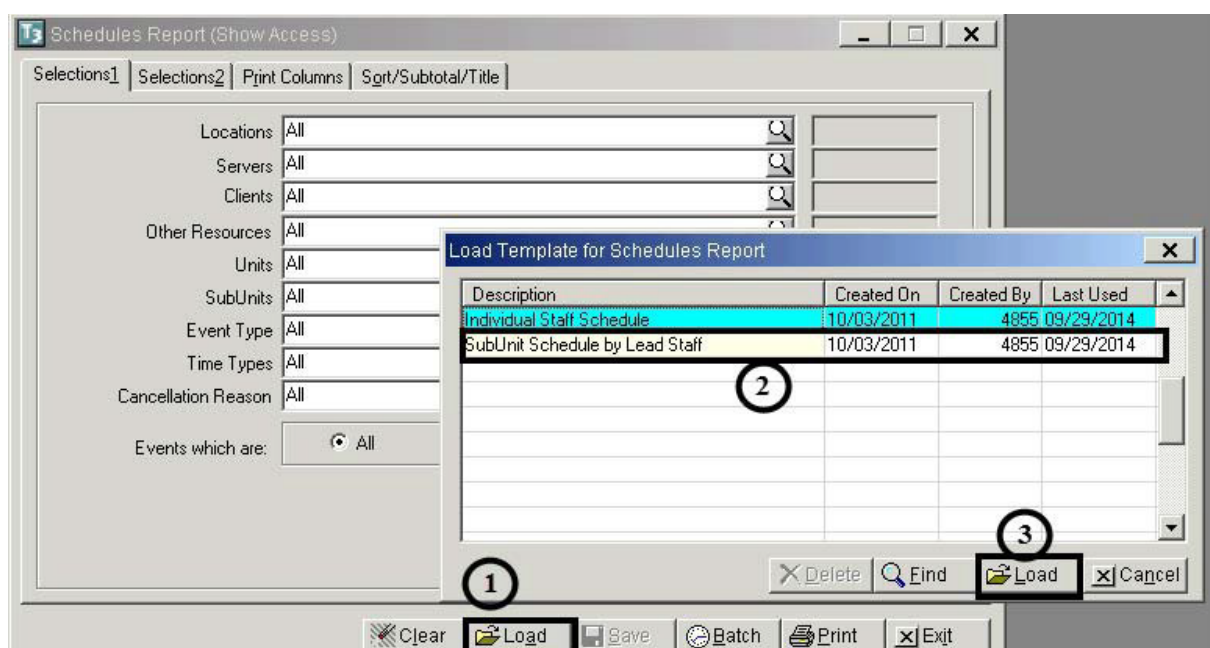
Selections 1 Tab

- Enter the unit number in the "Locations" field

Selection 2 Tab

- Enter the desired date range in the "Dates/Time" fields
- Click "Print"

PRINTING APPOINTMENT SHEETS
AND CONSUMER ENCOUNTER FORMS

This report prints appointment sheets for appointment events and consumer encounter forms for service events. A template has been created that prints the forms based on the date range selected. The forms will be sorted by staff and will print in order by the date and time of the event

To Access the Template:
- Click "Scheduler" on the menu bar
- From the drop down menu, click "Scheduler Reports"
- Click "Print Appointment Sheets"
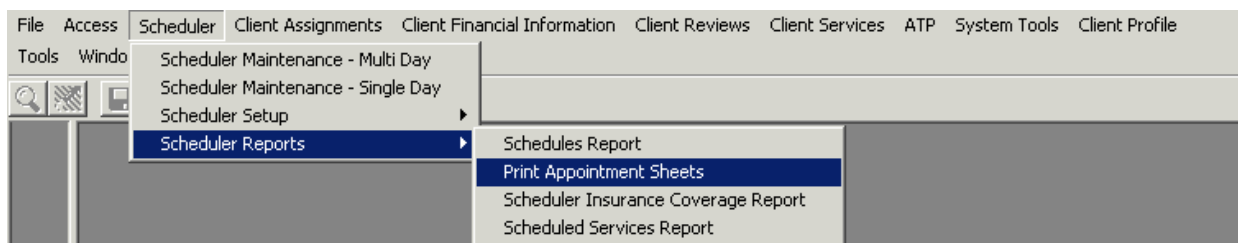
- The "Print Appointment Sheets" dialog box appears. Click "Load"
- Click the "Appointment Sheets by Staff and Date" template
- Click "Load"

Selection 1 Tab
- Enter the unit number in the "Locations" field
- Enter the desired date range in the "Dates/Time" fields
- Click "Print"

PRINTING SCHEDULED SERVICES REPORT

The "Scheduled Services Report" prints service events only and can be used to compare scheduled services with those that were actually provided. A template has been created for use

To Access the Template:
- Click "Scheduler" on the menu bar
- From the drop down menu, click "Scheduler Reports"
- Click "Scheduler Services Report"
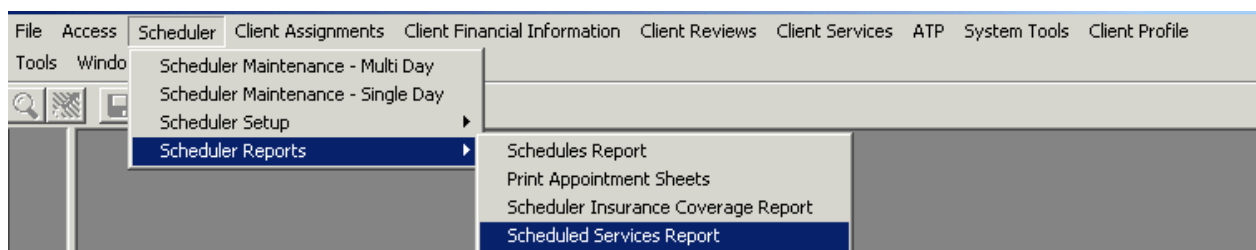
- The "Scheduled Services Report" dialog box appears. Select "Load"
- Click the "Scheduled Services by Unit, Sub-Unit, Server and Date" template
- Click "Load"

Selection 1 Tab
- Enter the unit number in the "Locations" field

Selection 3 Tab
- Enter desired date range in the "Date/Time" fields
- Click "Print"

Support Desk Contact Information
sdhelpdesk@optum.com
1-800-834-3792

Monday through Friday (E-mail)

Hours	Services
6:00 am to 6:00 pm	All services except password resets or any service involving PHI

Monday through Friday (Telephone)

Hours	Services
4:30 am to 6:00 am	Resetting passwords (24 hour programs) and reporting system outages*
6:00 am to 6:00 pm	All services
6:00 pm to 11:00 pm	Resetting passwords (24 hour programs) and reporting system outages*
11:00 pm to 4:30 am	Reporting system outages*

Weekends (Telephone)

Hours	Services
4:30 am to 11:00 pm	Resetting passwords (24 hour programs) and reporting system outages*
11:00 pm to 4:30 am	Reporting system outages*

* By definition, a system outage affects multiple users. Examples include when:
- The system does not respond and appears to be frozen
- No data can be entered or viewed

Support Desk Suggestions

- Please consult with your program manager and your resource packet prior to contacting the Support Desk.

- When calling for a password reset on weekdays between 4:30-6a or 6-11p, or calling weekends between 4:30a-11p, you must leave a message. Include your name, CCBH staff ID, phone number and the reason for your call.

- You may be given a ticket/tracking number if you call between 6:00a and 6:00p Monday through Friday. Remember to keep this number for future reference.

Additional Contacts

Questions	Where To Go
Clinical Documentation Questions	Documentation Manual/Your Program Manager
Duplicate Clients and Name/DOB/Gender/SSN Changes	Complete Form BHS-025 and Call Medical Records: 619-692-5700 x 3
Financial Questions (UMDAP/Insurance)	Billing Unit: 619-338-2612 Fax- 858-467-9682
Online User Manuals and Forms	www.optumsandiego.com
Service Codes	CCBH (Anasazi) User Manual/QM Unit

Revised 04.2017