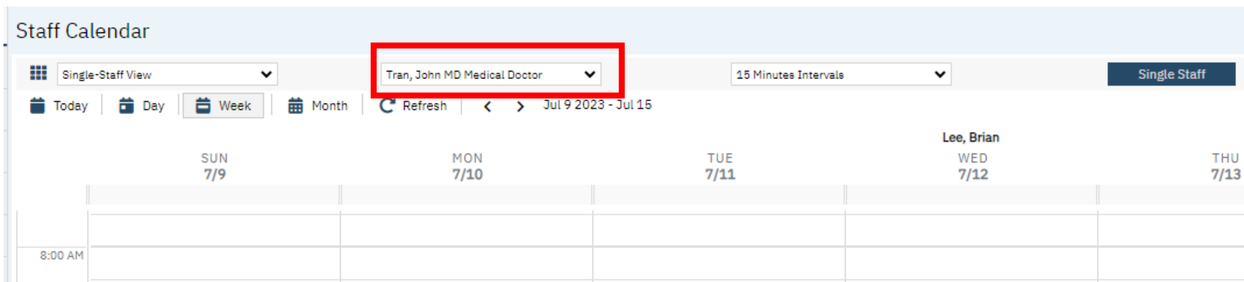
How to Schedule from the Staff Calendar

Note: the calendar examples used in this guide, such as the scheduling rules, are what is utilized by the FCDBH staff to schedule doctors appts. Your calendar may be set up differently for different departments, but the process of scheduling will be the same. Reach out to your supervisor for additional help regarding your department.

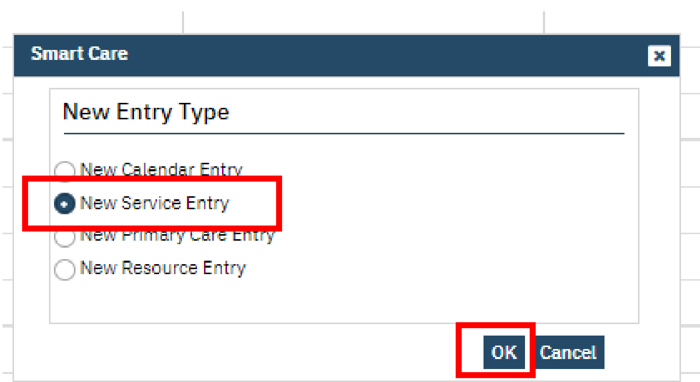
Scheduling

1. With the client profile open, click on "Search" icon and type calendar then select "Staff Calendar – My Office" from the drop down.
2. This will open the staff's calendar. Select the prescriber you want from the drop down and click on "Apply Filter." You can type the prescribers name, but you must be fast!



3. Using the arrows at the top of the screen, below the staff name, navigate to the date and time you want to schedule the appointment, click, and drag where you want to schedule (it should turn yellow). A new smaller window will pop up the SmartCare window.

4. Select "New Service Entry" click on "ok"



   a. If you do not already have the PS profile open at this point, a new screen will pop up allowing you to use the "Client Search" options. Use these options to locate the correct client profile you are scheduling for.

5. This will then take you to the "Service Note" window.

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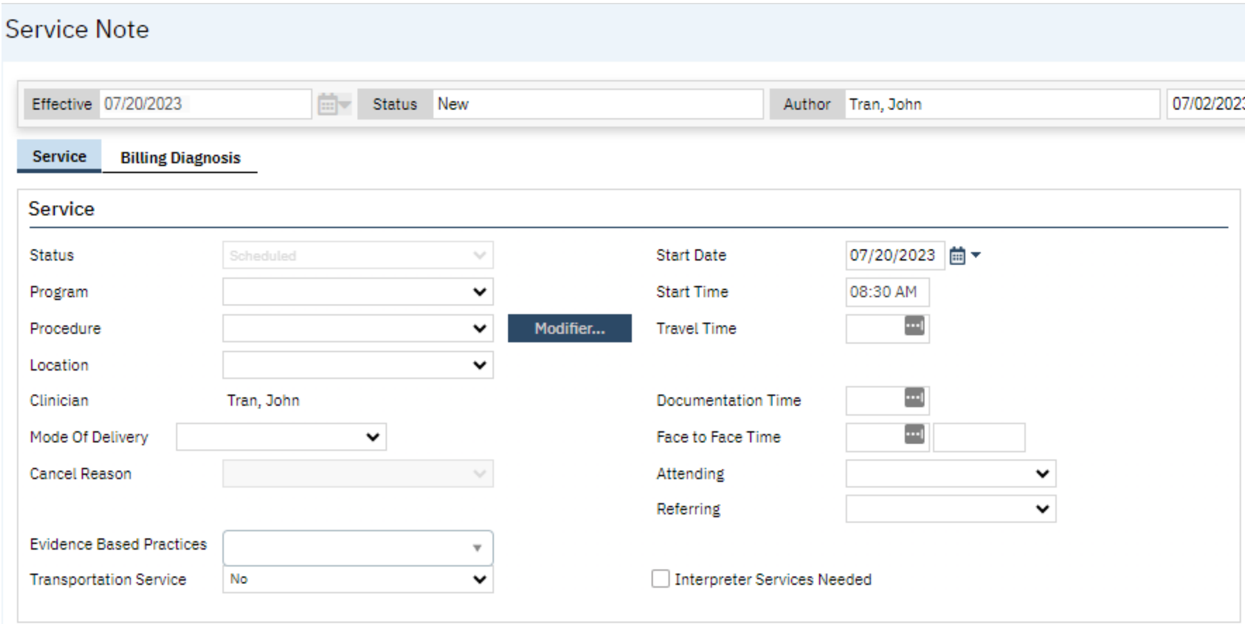


- Below are the rules and guides by FCDBH scheduling staff. Please select the correct information from the drop-down menus that are appropriate for the service you are scheduling for. This may vary by department. Be sure to take note of step C below.

1) **For Procedure select** "Assessment MD" if it is the first appointment for a new persons served. If it is a follow up appointment – select "Medication Support – Existing Client."

2) **Location** – select the appropriate one from the chart below.

Telehealth - Audio and Video Patient's Home	When TeleHealth from their home
Community Mental Health Center	When person needs to come into the office

1) **Start time** – enter start time of appointment.
2) **Total Duration** – enter the number of minutes the appointment should be. Don't forget to include the 15-minute nursing time.

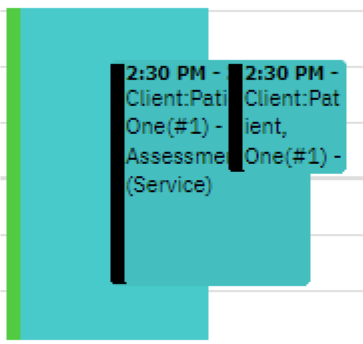
   SCHEDULING RULES:

   a) Before scheduling a new appointment, verify that the person served does not have 2 missed appointments. See the "2 missed appointments" how to guide for more information.
   b) **Each appointment will overlap the previous appointment by 15min. For example, if an appointment starts at 1:15 and ends at 2:00, the next available appointment will start at 1:45. This will allow the extra 15min for the nurses to do their tasks before the doctors start on their time. The total time of the appointment is 45min = 15 (nurses) + 30 (doctors). The same rules apply to the hour-long appointments. If an appointment starts at 1:15 and ends at 2:30 the next appointment for will start at 2:15. Total time: 75min = 15 (nurses) + 60 (doctors).**
      i) To determine if a patient needs a 45min or 75min appointment, look at the comment section of the "Reception/Front Desk" page. The provider should have left the information there**.** If scheduling in

person, often the provider will tell the patient when to return verbally. If no return time is given, default to 4 weeks – 45- min (total) appointment.

ii) If the patient is being scheduled for a first appointment or a psych evaluation update: schedule for **75min** appointment, procedure will be "Assessment MD". All other appointments will be **45min** total and procedure will be "medication support existing client". Save.

c) Verify that you did not double book the provider by checking their calendar for the new date and time that you just scheduled for. If there is a double booking one of the appointments will need to be rescheduled. It will be easier to reschedule/adjust the one you just made if you still have the patient on the phone or in front of you (for areas that support in person scheduling). You will receive a notice that says there is already something scheduled for that time, this will come up regardless of double booking or not due to how we schedule. Click ok. See below for example of double booking.



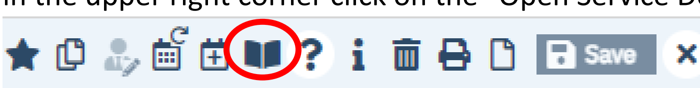
Provider is double booked. This would need to be fixed by rescheduling one of the appts.

d) You can add any needed interpreter information in the box below the Service Note section at this time. With the service details open, see step 8 below.

<u>**Remember to save all your work before closing or navigating away from this screen.**</u> Your appointment should now be scheduled on the provider calendar.

If you need to edit information on the appointment after scheduling.

1. Open the staff calendar and locate the desired appointment and click on the appt.
2. this will bring up the "Progress Note" screen. do not try to edit from this screen, SmartCare will not allow it.
3. in the upper right corner click on the "Open Service Detail" icon



4. this will open the "Service Detail" screen.

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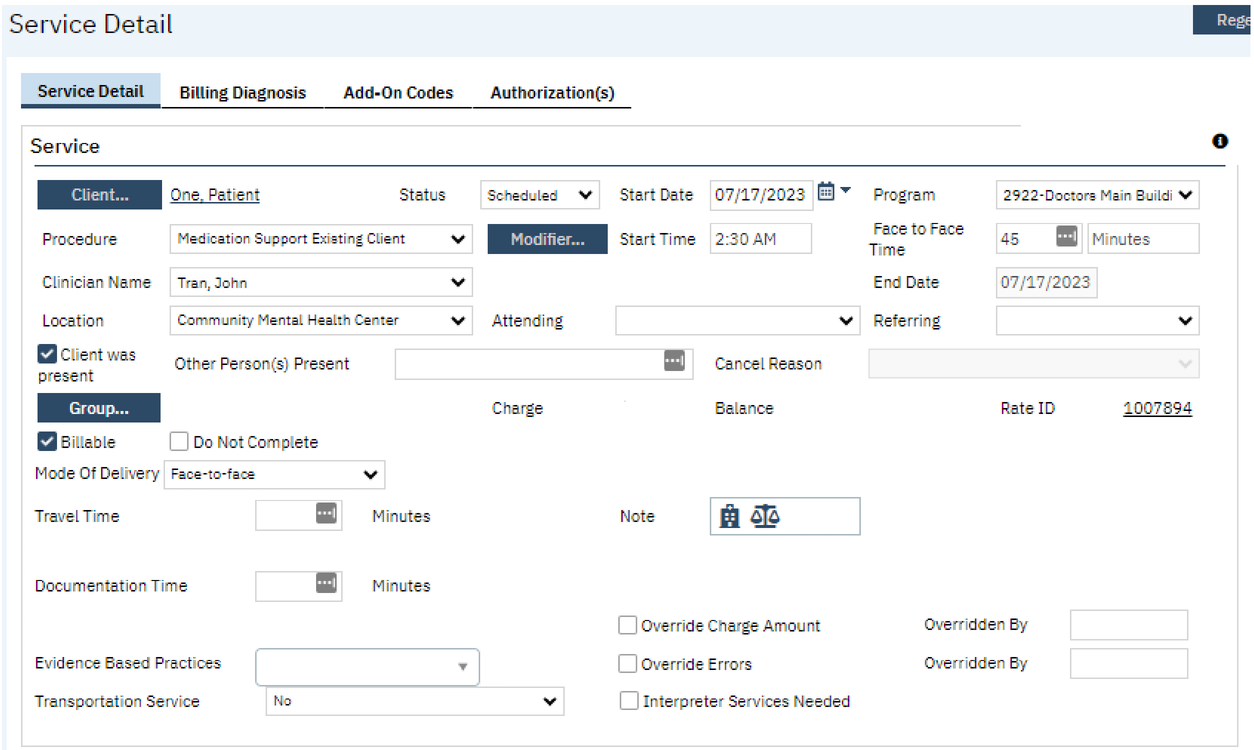
5. You can edit any information needed from this screen.
6. Remember to save your work.



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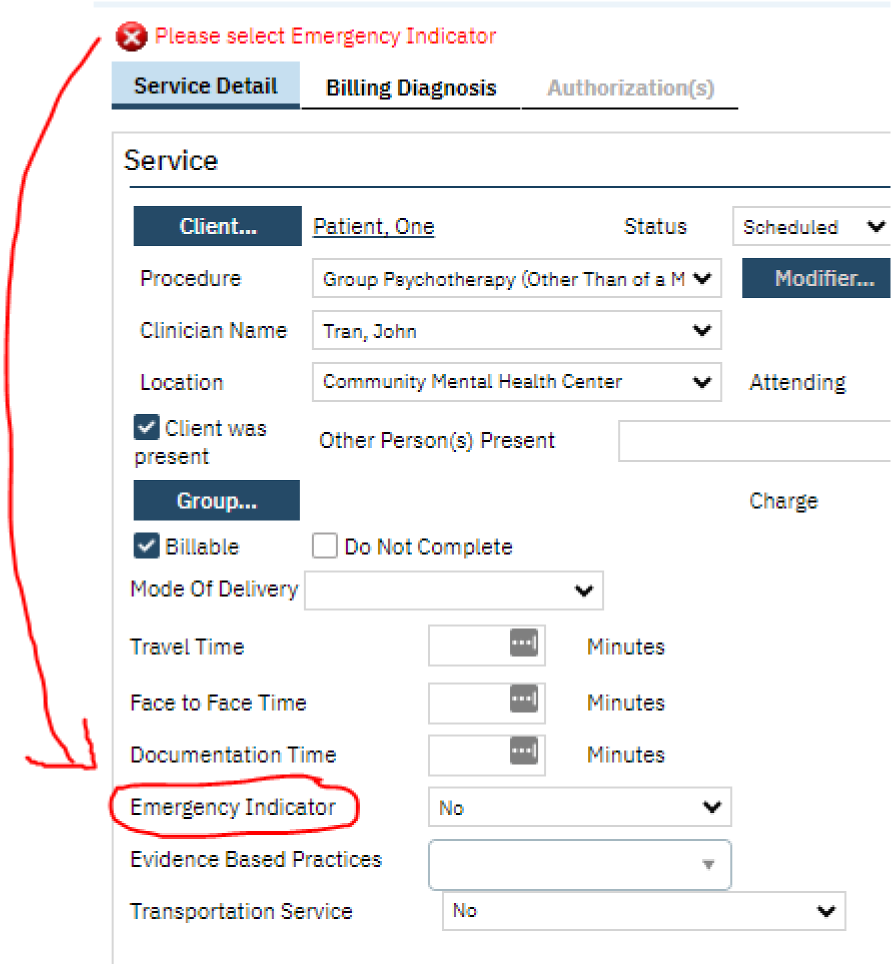
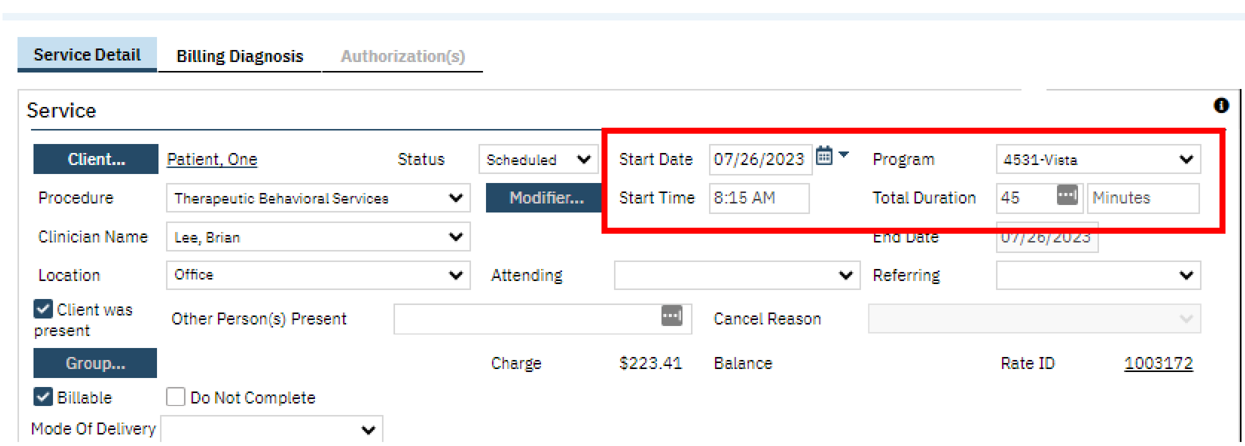
ADDITIONAL INFORMATION:

6. If you see a drop down to enter an "Emergency Indicator," enter "no".
    a. This will <u>not</u> appear on every appointment you make.



7. Make sure all the information is correct. Double check the "date, start time, and duration of appointment.



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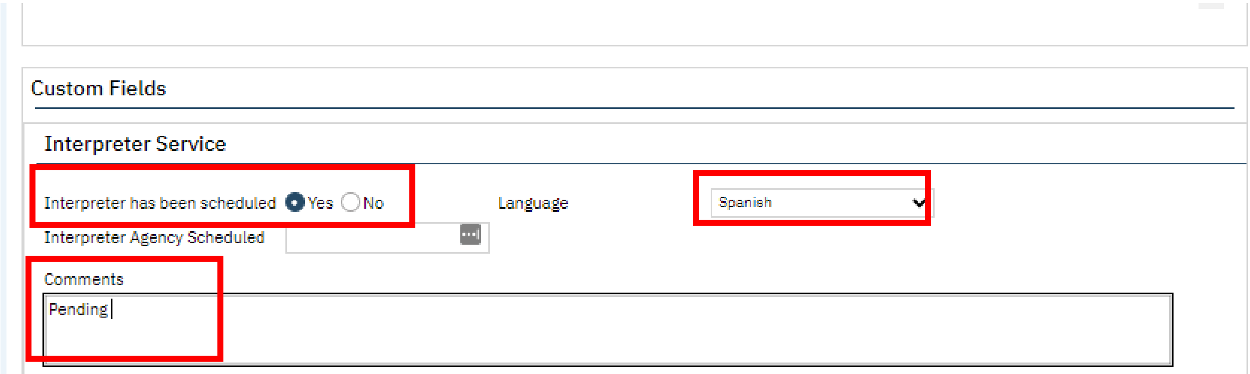
8. You will also need to select if an interpreter is needed. If so, select the language, and type “pending” in comments box. (Follow process for requesting and interpreter)



9. Click save in the upper right corner.