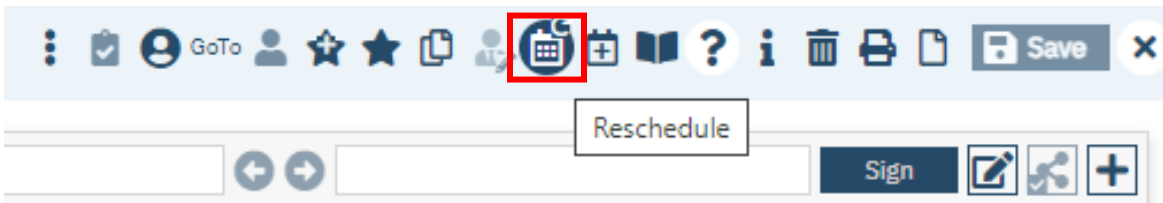


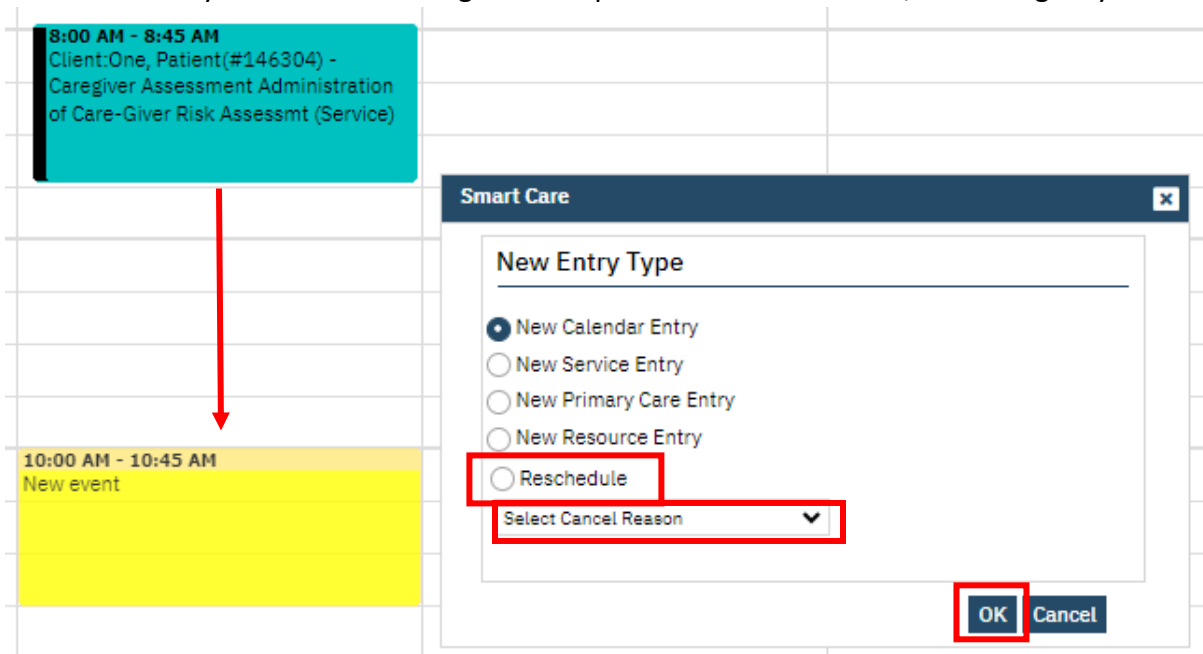
How to Reschedule an Appointment

Option 1:

1. Open client profile and search for “Services (Client)” to bring up all upcoming appts.
2. Locate the correct appt date and time.
 - a. Verify with client that it is the one they wish to reschedule.
3. Click the appt time to open the “Service Details” page.
 - a. In the upper right side of the “Service Details” page in the row of icons, locate the reschedule option.



4. This should open the staff calendar.
 - a. Navigate to the next available appt time slot that is appropriate for the appt.
 - i. For example: the FCDBH rule for an assessment is 60min. Scheduling staff would make sure that the time slot has enough room for the 60min appt.
 - b. Click and drag on the calendar to insert new appt.
 - c. There will be a small pop up that appears after. **Make sure you are selecting “Reschedule” and not “New Service”.**
 - d. Select appropriate “Cancel Reason”. Such as “Transportation” or “Illness”. Click “OK”.
 - i. If you are rescheduling due to a provider who called out, select “Agency Canceled”.





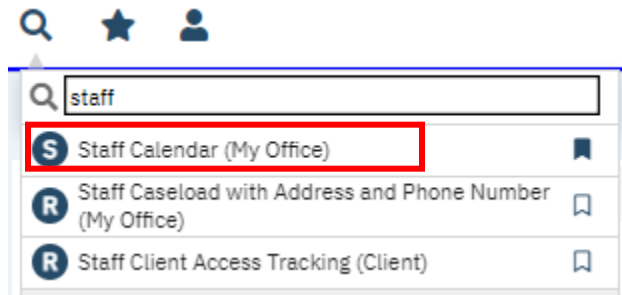
5. The “Service Details” page should now be displayed. Verify that you have the correct information for the following:
 - a. Start Time
 - b. Location
 - c. Appt duration (Face to Face Time)
 - d. Procedure
 - e. Mode of Delivery

How to Reschedule an Appointment

- f. Any additional comments or Interpreter Service
 - i. If there is an interpreter need, make sure you reach out to the appropriate OA or DBH OA email to inform of the need to reschedule the interpreter.
6. Click “Save” in the upper right of the screen. The staff calendar will now update to reflect the rescheduled appt. Note: The Reception/Front Desk screen will reflect that the appt was “canceled”. This is fine, just add a note in the comment box that it was rescheduled to new date.

Option 2: (long way - from staff calendar) this option depends on if the client knows the date and time of their upcoming appt.

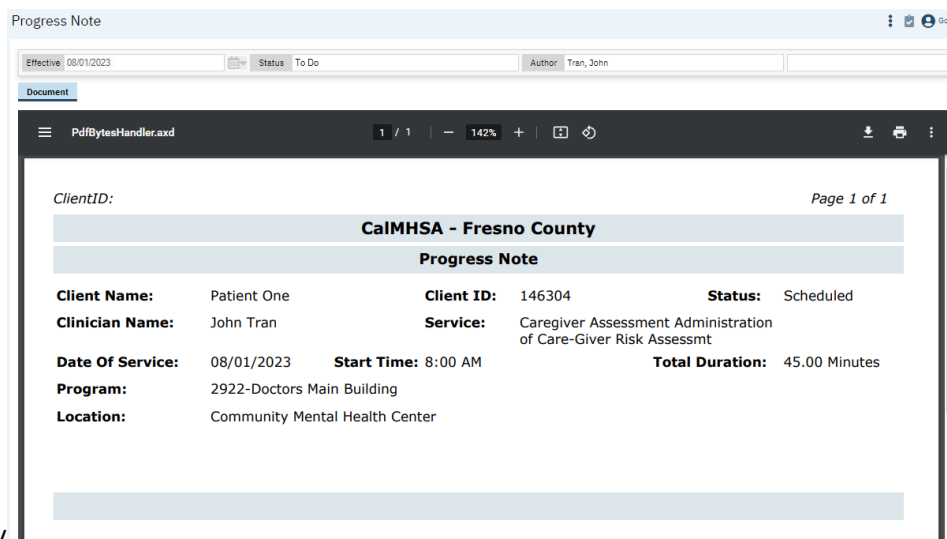
1. Search for client in SmartCare using the Client Search in the upper left. 
2. With client profile open, click on the Search Icon in the upper left. 
 - a. Verify upcoming appt by typing in “Services (Client)” in the search bar.
3. Type in Calendar – Select “Staff Calendar (My Office)” from the drop down.



4. From the “Staff Calendar” view, select which DBH staff calendar you would like to view and hit “Apply Filter”.

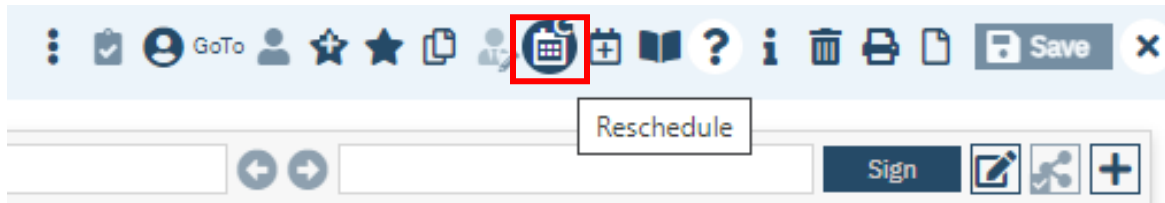


5. Once you’ve located the appointment you’d like to reschedule, click on the blue/teal part. This will open the Progress Note screen.

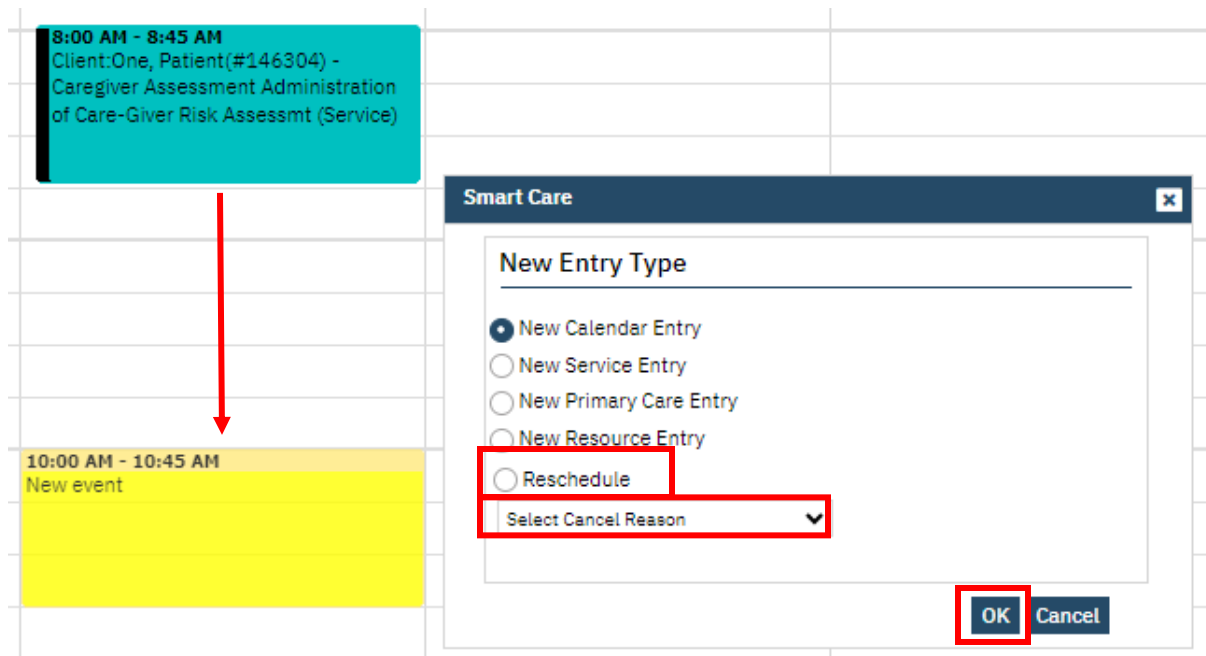


How to Reschedule an Appointment

- From the Progress Note screen, select the Reschedule icon from the top right.



- This will bring you back to the Staff Calendar view, from here you can select the new appointment (by clicking or dragging/drop). This will bring up the following window for you to select "Reschedule" and select a Cancel Reason. Once done, hit OK.



- This will bring you to the Service Detail screen where you can then confirm that the new appointment date/time was updated.

How to Reschedule an Appointment

Service Detail

Service Detail | Billing Diagnosis | Authorization(s)

Service

Client... One, Patient Status Scheduled Start Date 08/01/2023 Start Time 10:00 AM

Procedure Caregiver Assessment Administration of Modifier...

Clinician Name Tran, John

9. Verify appt information (steps 5a – i above). If everything is accurate, you may now hit “Save”.



10. If you want to visually confirm that your appointment was updated, navigate back to the Staff Calendar screen through your history and locate the appointment.

