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.

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	Reschedule
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- 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. <u>Make sure you are selecting "Reschedule" and</u> <u>not "New Service".</u>
 - 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".

8:00 AM - 8:45 AM Client:One, Patient(#146304) - Caregiver Assessment Administration of Care-Giver Risk Assessmt (Service)	
	Smart Care 🗙
	New Entry Type
	New Calendar Entry New Service Entry New Primary Care Entry New Resource Entry
10:00 AM - 10:45 AM New event	Reschedule Select Cancel Reason
	OK Cancel

- 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

- 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".

Tran, John MD Medical Doctor 🔹 🗸	15 Minutes Intervals	~	Single Staff	< Showing 1-1/1 >	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.

otive 08/01/2023	Status To D)o		Author Tran, John		
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ClientID:						Page 1 of 1
		CalMH	SA - Fresi	no County		-
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Client Name:	Patient One		Client ID:	146304	Status:	Scheduled
Clinician Name:	John Tran		Service:	Caregiver Assessm of Care-Giver Risk	ent Administration Assessmt	
Date Of Service:	08/01/2023	Start Time:	8:00 AM		Total Duration:	45.00 Minutes
Program:	2922-Doctors Main Building					
Location:	Community Mental Health Center					

Updated 5/9/24

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



7. 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.

8:00 AM - 8:45 AM Client:One, Patient(#146304) - Caregiver Assessment Administration of Care-Giver Risk Assessmt (Service)		
	Smart Care 🗙	
	New Entry Type	
	New Calendar Entry New Service Entry New Primary Care Entry	
10:00 AM - 10:45 AM New event	Reschedule Select Cancel Reason	
	OK Cancel	

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

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Service Detail	Billing Diagnosis	Authorization(s)					
Service							
Client	One, Patient	Status	Scheduled	~	Start Date	08/01/2023	3
Procedure	Caregiver Assessment	Administration of 🗙	Modifier.		Start Time	10:00 AM	
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.

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	History		History 🗖 🗙	3
	Screens		Clients	
ł	[One, Patient (146304)] Service	0	One, Patient (146304)	
	[One, Patient (146304)] Service	0	Patient V, One (1)	
		0		
	Staff Calendar	0		