

Administrator + Superuser: Scheduler Configuration QRG

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The workflows for configuring your Agency's schedule differ based on the areas in NextStep Clinical, Web Scheduler, and RDP Scheduler that are accessible to you based on your permissions. The sections in this guide that differ according to your access point include steps for all workflows -- whether you're working from System Setup (Supplemental) in NextStep Clinical, from the Web Scheduler (via Scheduler button), or the RDP Scheduler.

Add and Edit Scheduler Locations and Activities

Locations are the physical places where your appointments are held. Activities are what is done during the appointment. Locations and Activities setup define the overall appearance of a type of appointment in the Scheduler. For example, your Agency may decide that an Initial Visit appointment has a blue activity and red location.

Add Locations and Activities from NextStep Clinical

1. Within NextStep Clinical, navigate to Scheduler Configuration: **Main Menu > Admin Tools Menu > System Setup (Supplemental) > Scheduler Configuration.**
2. To:
 - **Add a new Activity**
 - a. In the Scheduler Activities section, click **New**.
 - b. Enter an **Activity** Name.
 - c. Select a **Color** from the drop-down.
 - d. Select the **Use for Telehealth?** checkbox if you want to designate the appointment activity as telehealth.
Note: This is the only area where you can designate this.
 - **Add a new Location**
 - a. In the Scheduler Locations section, click **New**.
 - b. Enter a **Location** Name.
 - c. Select a **Color** from the drop-down.
 - d. Select the **Striped** checkbox, if you want the Location option to be striped.
3. Click **Save Changes** when finished.

Add Locations and Activities from Web Scheduler

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1. Navigate to Scheduler Setup: **Clinical Navigation Menu > Scheduler > Setup button**.
2. Click the **Locations and Activities** tab.
3. To:
 - **Add a new Activity:**
 - a. Click the **New** button.
 - b. Add a **Caption** (name of the Activity), select a **Color**, and select a **Type**.
 - c. Click the **Save Changes** button.
 - **Add a new Location:**
 - a. Click the **New** button.
 - b. Add a **Caption** (name of the Location), select a **Color**, select the **Striped** checkbox if you want the Location to show as striped, and select a **Type**.
 - c. Click the **Save Changes** button.

Edit Locations and Activities

You can edit Locations and Activities in 3 places: NextStep Clinical, Web Scheduler, and the RDP Scheduler.

1. Navigate to Locations and Activities by following one of the paths below based on your access:
 - **In NextStep Clinical: Main Menu > Admin Tools Menu > System Setup (Supplemental) > Scheduler Configuration**
 - **In the Web Scheduler: Clinical Navigation Menu > Scheduler > Setup button > Locations and Activities tab**
 - **In the RDP Scheduler: RDP Scheduler > Setup button > Locations and Activities tab**
2. In the Activities or Locations section, make the necessary edits.
3. Click the **Save** or **Save Changes** button.

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Add and Edit Scheduler Appointment Templates

Appointment Templates are used to define different appointment characteristics for different types of appointments. Templates are based on an Activity, Location, and Duration. As Templates are created, they are available as options in the **Select an appointment template** drop-down in the left-hand panel in the Scheduler. Templates can only be created from the Web Scheduler and from the RDP Scheduler.

Add an Appointment Template

1. Navigate to Scheduler Setup by following one of the paths below:

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- **In the Web Scheduler: Clinical Navigation Menu > Scheduler > Setup button.**
 - **In the RDP Scheduler: RDP Scheduler > Setup button.**
2. Click the **Templates** tab.
 3. To add a new Template:
 - **In the Web Scheduler:**
 - a. Click the **New** button.
 - b. Enter a **Template name**.
 - c. Click the **Save Changes** button.
 - d. Click to select the Template and complete the fields:
 - **Appointment Heading:** This information is displayed when viewing the appointment on the calendar.
 - i. Click the **Edit** button and select the information you want to show in the appointment header.
 - ii. Click **OK** to save your changes.
 - **Subheading:** This information is displayed when viewing the appointment on the calendar.
 - i. Click the **Edit** button and select the information you want to show in the appointment header.
 - ii. Click **OK** to save your changes.
 - **Activity, Location, Duration, Status:** Make a selection from the respective drop-down.
 - **Notes:** Enter notes as necessary.
 - e. Click the **Save** button.
 - **In the RDP Scheduler:**
 - a. Click the **New** button.

Note: Click the **Copy** button if you wish to copy the highlighted Template and make changes to it.
 - b. Enter a **Template Name**.
 - c. Complete the following fields: **Appointment Heading, Subheading, Activity, Location, Duration, Status** and **Notes**.
 - d. Click the **Save** button.

Edit an Appointment Template

1. Navigate to Scheduler Setup:
 - **In the Web Scheduler: Clinical Navigation Menu > Scheduler > Setup button**
 - **In the RDP Scheduler: RDP Scheduler > Setup button**
2. Click the **Templates** tab.
3. To edit a Template:

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- **In the Web Scheduler:**

- a. In the Available Templates section, select a Template.
- b. Click into a field and type or select a drop-down to make a change. In the **Appointment Heading**, **Subheading** and **Notes** fields, click the **Edit** button and make changes as necessary then click **OK**.
- c. Click the **Save Changes** button.

Note: To delete a template, click the **Delete** button and then the **Save Changes** button.

- **In the RDP Scheduler:**

- a. Select a Template.
- b. Click into a field and type or select a drop-down to make a change. In the **Appointment Heading**, **Subheading** and **Notes** fields, click the **Edit** button and make changes as necessary then click **OK**.
- c. Click the **Save Changes** button.

Note: To delete a template, click the **Delete** button and then the **Yes** button.

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Add and Edit Scheduler Resources

A Resource is a person, place, or thing that requires a schedule. For example, a client is scheduled with a Clinician, exam room, or equipment. If a user is added to the NextStep Clinical site, they are displayed in the Resources section of Scheduler Setup. However, non-user Resources, such as a room or equipment, need to be manually entered.

Add a New Non-User Resource

1. Navigate to Scheduler Setup: **RDP Scheduler > Setup button**.
2. Click the **Resources** tab.
3. Click into the **Click here to add a new resource** field.
4. Enter a **Name** for the Resource.
5. Select a **Color** from the drop-down.
6. Select the **Active** checkbox, to make this Resource active.
7. Select the **User** and **Profile** checkbox(es) to make the Resource visible to Users or the currently selected Profile.
8. Click the **Save** button.

Edit Resources

1. Navigate to Scheduler Setup:
 - **In the Web Scheduler: Clinical Navigation Menu > Scheduler > Setup button**
 - **In the RDP Scheduler: RDP Scheduler > Setup button**

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2. Click the **Resources** tab.
3. Make your edits.
4. Click the **Save or Save Changes** button.

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Scheduler Profiles: Manage Users and Manage Profiles

Profiles are a way to keep track of the way you view Scheduler data. There is a relationship between Users, Resources, and Profiles. A User is the actual user of the system, a Resource is someone or something you book time with/on, and a Profile is a collection of Resources that do not necessarily have to be related. When you select a Profile in the Scheduler, what you see displayed is based on how it is set up below.

Manage a User's Access to Resources and Profiles

1. From within NextStep Clinical, navigate to Scheduler Profiles: **Main Menu > Admin Tools Menu > Scheduler Profiles**.
2. Click the **Manage Users** tab.
3. Select a **User** from the drop-down.
4. In the Resources section, make edits as necessary for the selected user:
 - **Visible to User?:** Select this checkbox if you want the User to see the Resource in their Select a Resource drop-down.
 - **Can Edit Schedule?:** Select this checkbox if you want the user to be able to edit the schedule of the Resource.
5. In the Profiles section, make edits as necessary for the selected user:
 - **Visible to User?:** Select this checkbox if you want the User to see the Profile as an option in their Profile selection drop-down.

Note: There are bulk options you can use for a selected User, click one of the following buttons if applicable to your scenario: **Mark All Resources Visible for this User**, **Mark all Schedules Editable for this User**, **Mark All Resources Invisible for this User**, **Mark all Schedules Not Editable for this User**, or **Mark all Profiles Invisible for this User**.

Manage Profiles

1. From within NextStep Clinical, navigate to Scheduler Profiles: **Main Menu > Admin Tools Menu > Scheduler Profiles**.
2. Click the **Manage Profiles** tab.

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3. Select a **Profile** from the drop-down.
4. In the Resources for Profile section, make edits as necessary for the selected Profile:
 - **Visible to Profile?** Select this checkbox if you want the Resource to display in the Select a Resource drop-down in the left-hand panel of the Scheduler for anyone viewing this Profile.
 - **Showing on Profile?** Select this checkbox, if you want the Resource to display on the calendar when this Profile is selected.

Note: There are bulk options you can use for a selected user, click one of the following buttons if applicable to your scenario: **Mark All Resource Visible for this Profile**, **Mark all Resource Showing on this Profile**, **Mark All Resources Invisible for this Profile**, **Mark all Resource Not Showing on this Profile**, or **Sort Resources alphabetically on this Profile**.

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