Scheduler QRG

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The Scheduler is accessed as the Web Scheduler or the Remote Desktop Protocol (RDP) Scheduler. It allows you to view schedules, schedule or edit client appointments, sessions, or other visit types, and receive payments made to your Agency.

Access the Scheduler

How you access the Scheduler depends on how your Agency is configured- either with the Web Scheduler or the RDP Scheduler.

Web Scheduler

Navigate to the Scheduler in NextStep Clinical: **Navigation Menu > Scheduler**. The Web Scheduler opens in a different browser tab. You can click the **Go to NextStep** button at the top of the window or click the Clinical site browser tab to return to the Clinical site.

RDP Scheduler

1. Double-click the **Scheduler** icon on your desktop.
2. Enter your **Username** and **Password**, and click the **Ok** button.

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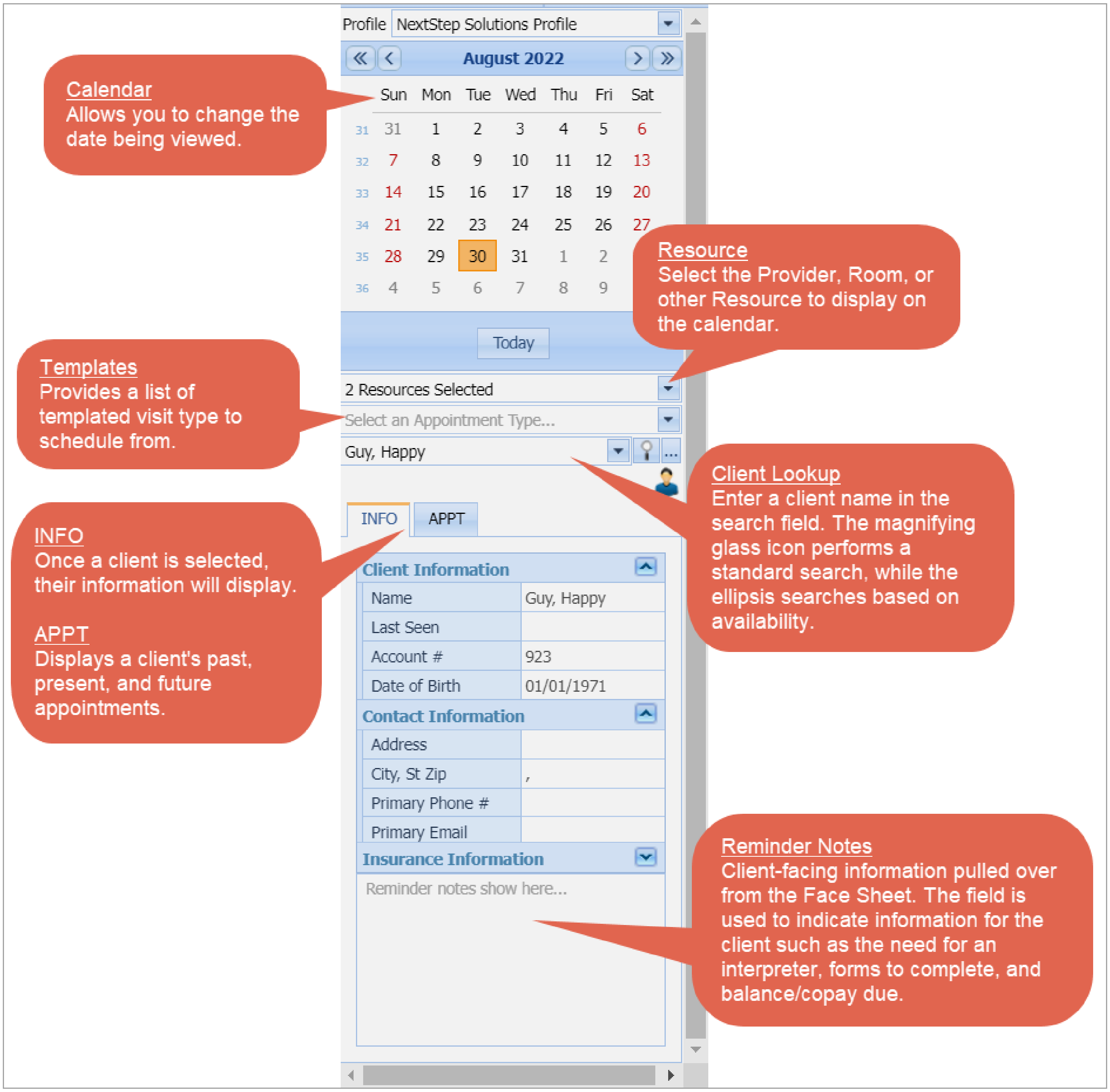
Scheduler At-A-Glance

The three main sections of the Scheduler are the Side Menu, Top Menu, and Calendar.

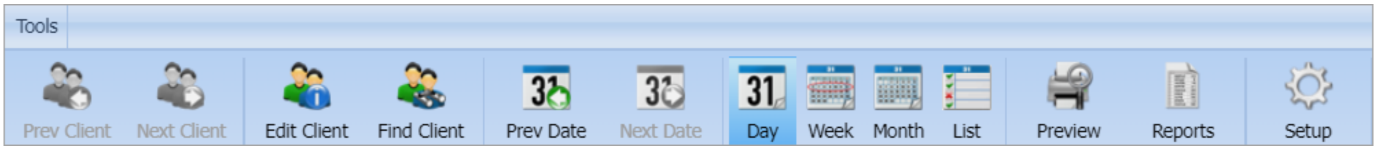
Side Menu

The Side Menu is accessed by a user to schedule an appointment for a client and view client information.



Top Menu

The Top Menu displays options for further interactions with the Scheduler.

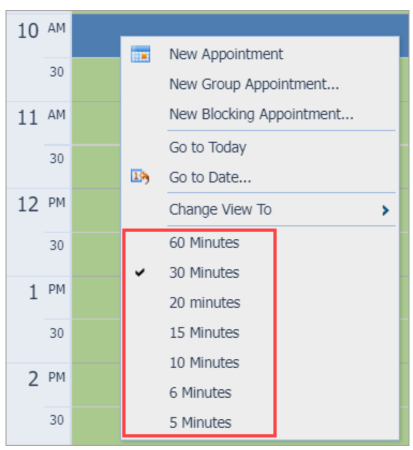


- **Tools**: Admin users can manage Security Settings for users.
- **Prev Client/Next Client**: These features are currently not used.
- **Edit Client**: It is recommended to not use this feature and to make all client changes in the Clinical site.
- **Find Client**: Another way to search for a client, similar to the Side Menu Client Lookup features.
- **Prev Date/Next Date**: Selects the last previous date viewed on the calendar.
- **Day/Week/Month/List**: Changes the calendar view to show only the day, the week, the month, or a list of appointments for the day.
- **Preview**: Displays a printable preview of the calendar view.
- **Reports**: Displays a list of Scheduler reports that can be run.
- **Setup**: Admin users can manage the configuration of the Scheduler.

Calendar

The Calendar displays options for editing your Scheduler view, existing appointments, and creating new appointments.

- **Duration on Calendar**: Right-click a calendar time slot to change the duration displayed on the calendar.



- **Range of Daily Schedule**: Click the **+** or **-** to the right of the scroll bar, to start your Provider's scheduler earlier or extend the schedule later.
- **Location/Activity/Status**: Right-click an appointment to change the location, activity, or status of the appointment.

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Schedule a New Appointment

1. Navigate to the Scheduler.
   - Web Scheduler in NextStep Clinical: **Navigation Menu > Scheduler**.
   - RDP Scheduler: Double-click the **Scheduler** icon on your desktop.
2. In the **Client Lookup** field, enter the client's name or click the drop-down to select a client.
3. Click the **Select an Appointment Type** drop-down and select the Template.
4. Schedule the appointment on the calendar using one of the two methods:
   - Drag the **Appointment icon** to the desired time on the calendar.
   - Double-click the desired appointment time on the calendar, fill in the details, then click the **OK** button.

Once the appointment is scheduled, the **APPT** tab on the Side Menu will reflect the scheduled appointment.

- **Scheduled Date and Time:** The first column displays the appointment date and time.
- **Location**: The **L** column displays the Location.
- **Activity**: The **A** column displays the Activity.
- **Status**: The **S** column displays the Status, which by default is blank until a status is selected for the appointment.

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Search for an Appointment

1. While in the Scheduler, enter the client's name in the Client Lookup field or click the drop-down to select a client.
2. Click the **APPT** tab on the Side Menu to view future appointments.
3. Click the appointment to view the Appointment Details.

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Edit or Delete an Appointment

Edit an Appointment

There are two ways to edit a client's appointment details:

Right-Click the Appointment (RDP Scheduler Only)

1. While in the Scheduler, right-click the appointment on the **APPT** tab or the **Calendar**.
   Note: To make quick changes to the Location, Activity, or Status, hover over **Location, Activity,** or **Status** and select an option.
2. Click **Open** to review the Appointment Details window.
3. Make the necessary changes to the appointment, and click the **OK** button.

Double-Click the Appointment

1. While in the Scheduler, double-click the appointment on the **APPT** tab or the **Calendar**.
2. Make the necessary changes to the appointment, and click the **OK** button.

Delete an Appointment

1. While in the Scheduler, enter the client's name in the Client Lookup field or click the drop-down to select a client.
2. Right-click the appointment from the APPT tab (RDP Scheduler only) or double-click the appointment from the Calendar.
3. Click the **Delete** button.
4. Click the **Yes** button to confirm the deletion.

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Reschedule an Appointment

Reschedule an Appointment (Same Day)

1. While in the Scheduler, enter the client's name in the Client Lookup field or click the drop-down to select a client.
2. Click the appointment on the Calendar that you want to move.
3. Drag and drop the appointment to the new timeslot.

Reschedule an Appointment (Different Day)

1. While in the Scheduler, enter the client's name in the Client Lookup field or click the drop-down to select a client.
2. Double-click the appointment on the Calendar.
3. Click the **Start Date** drop-down and select a different date.
4. *(Optional)* Click the **Start Time** drop-down and select a different time.
5. Click the **OK** button.

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Create a Recurring Appointment

Recurring appointments can be scheduled for clients that need to be seen daily, weekly, monthly, or yearly to make sure that the appointments are scheduled in advance.

1. While in the Scheduler, enter the client's name in the Client Lookup field or click the drop-down to select a client.
2. Double-click the appointment on the Calendar.
3. Click the **Recurrence** button. The Appointment Recurrence window is displayed.
4. Enter the start date in the **Start** field.
5. In the Recurrence pattern section, select the appropriate radio button.
6. In the Range of recurrence section, set the number of occurrences in the **End after** field or an **End by** date.
7. In the New appointment values section, select the appropriate checkbox(es) and drop-down(s) for the recurring appointments.
8. Click the **Save** button.
9. Review the **APPT** tab displaying all appointments.

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Check In and Check Out a Client

Check In a Client

1. While in the Scheduler, enter the client's name in the Client Lookup field or click the drop-down to select a client.
2. Right-click the appointment from the APPT tab (RDP Scheduler only) or the Calendar.
3. Hover over **Status**, and click **Checked In**.
   Note: Depending on your Agency setup, there may be a different status for you to select to check in a client. Check with your Agency to determine the correct status to select.

Check Out a Client

1. While in the Scheduler, enter the client's name in the Client Lookup field or click the drop-down to select a client.
2. Right-click the appointment from the APPT tab (RDP Scheduler only) or the Calendar.
3. Hover over **Status**, and click **Seen**. If the client has a copay or other balance, you can select **Seen w/ bal**.
   Note: Depending on your Agency setup, there may be a different status for you to select to check out a client. Check with your Agency to determine the correct status to select.

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Collect Payments via the Scheduler

The Scheduler can be used to collect payments from the client at the time of their appointment.

1. While in the Scheduler, enter the client's name in the Client Lookup field or click the drop-down to select a client.
2. Double-click the appointment on the Calendar.
3. In the Payment section, enter the **Amount** of the payment collected.
4. Click the **Method** drop-down and select the method of payment.
5. Enter the **Reference (Ref) #** if your Agency accesses the Scheduler via the RDP. The reference number keeps all aspects of care tied together.
   Note: The Reference number auto-populates for Agencies who use the Web Scheduler. The Reference number can manually be updated if needed.
6. Click the Date drop-down and select a date or click the **Today** button.
7. *(Optional)* Enter a **Note**, if needed.
8. *(Optional)* Enter an **Addl Ref #**, if needed.
9. Click the **OK** button. The Payment is automatically transmitted to the Billing Engine.

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