FEI Systems

Scheduler

September 2, 2020

Version 1

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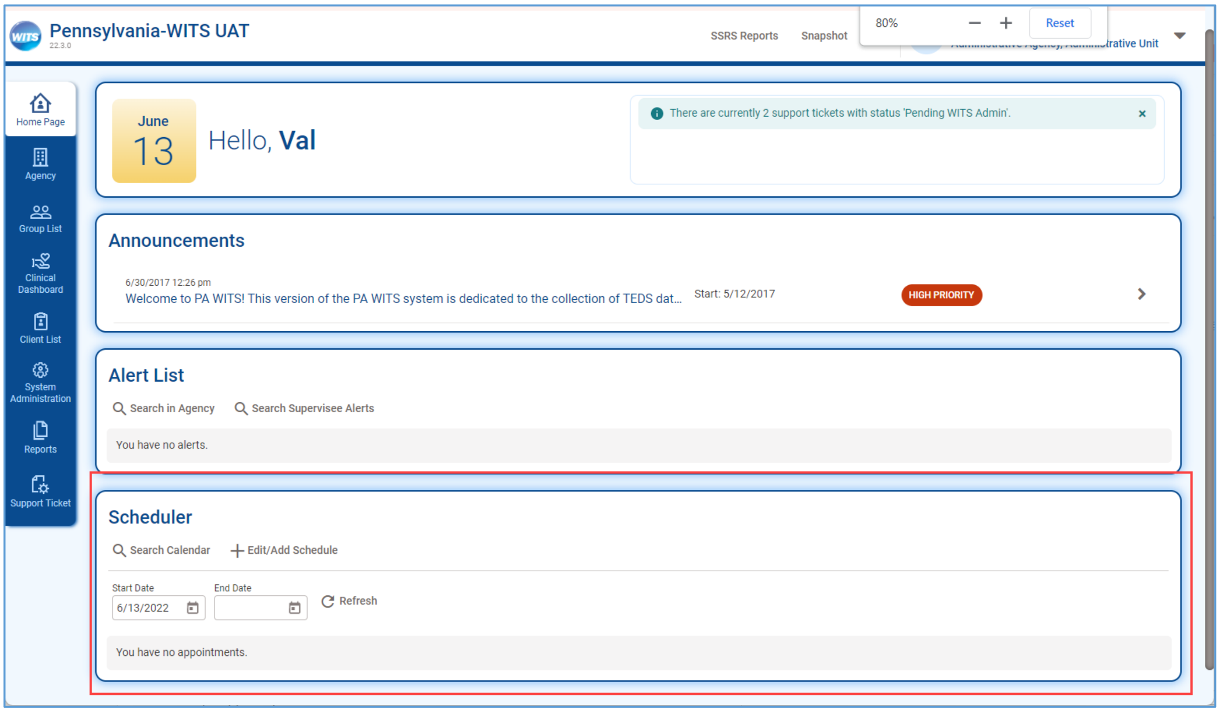
1 Introduction

The WITS scheduler offers users the ability to manage staff schedules, client appointments, and meetings across the agency, linking directly with WITS Encounters (for individual client appointments) and WITS Group Sessions (for group appointments). While the scheduler has been in place within WITS for many years, there were limitations with the module due to the technology it was built upon (Silverlight). FEI has re-developed the WITS scheduler within the 20.6 release (August 2020) to enable use of the scheduler across all major web browsers. This includes a new user interface, the ability to schedule appointments 24-hours a day, visibility of multiple staff members' schedules at once, and drag-and-drop functions. Additionally, FEI changed the Procedure dropdown (when scheduling an individual client or group session) to list the Service Description instead – which is more widely known to users of WITS.

The following user documentation is being provided to all WITS customers as an overview of these changes.

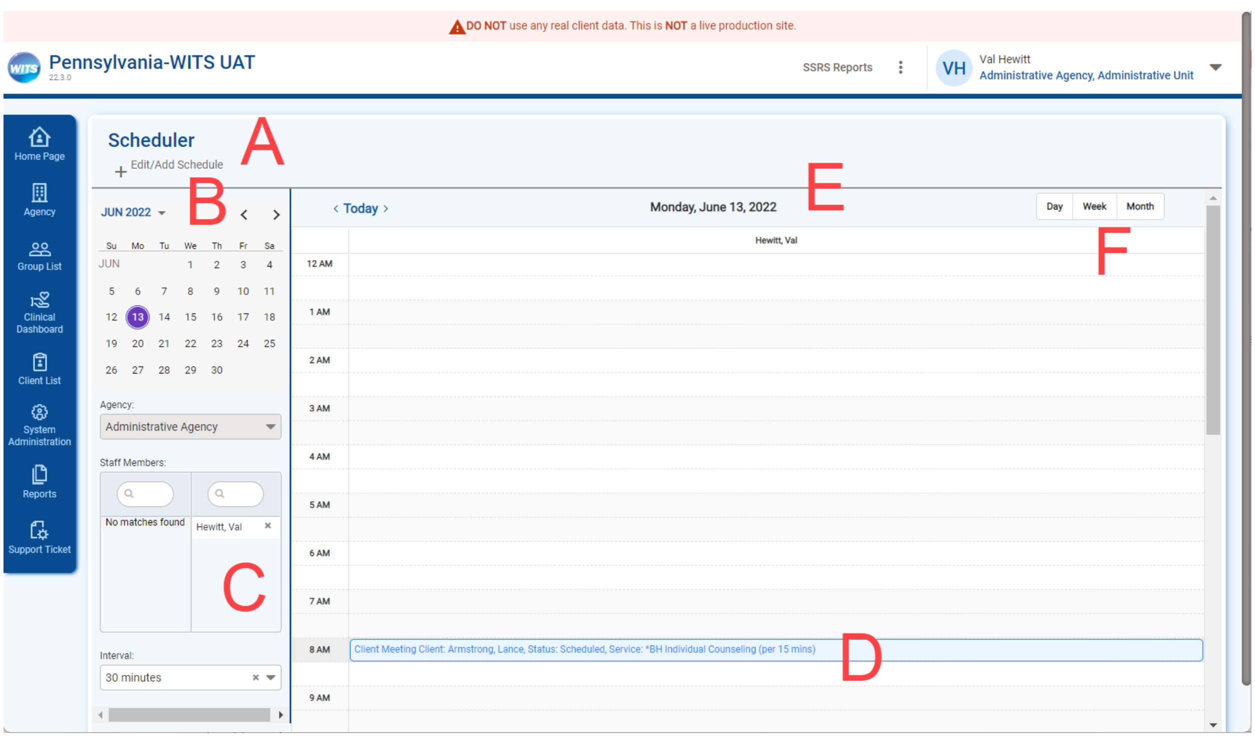
2 Scheduler

The Schedule list is displayed at the bottom of the Home Page. A list of the user's upcoming appointments is displayed by default. The list may be filtered by appointment start/end dates and refreshed to include recently added appointments.



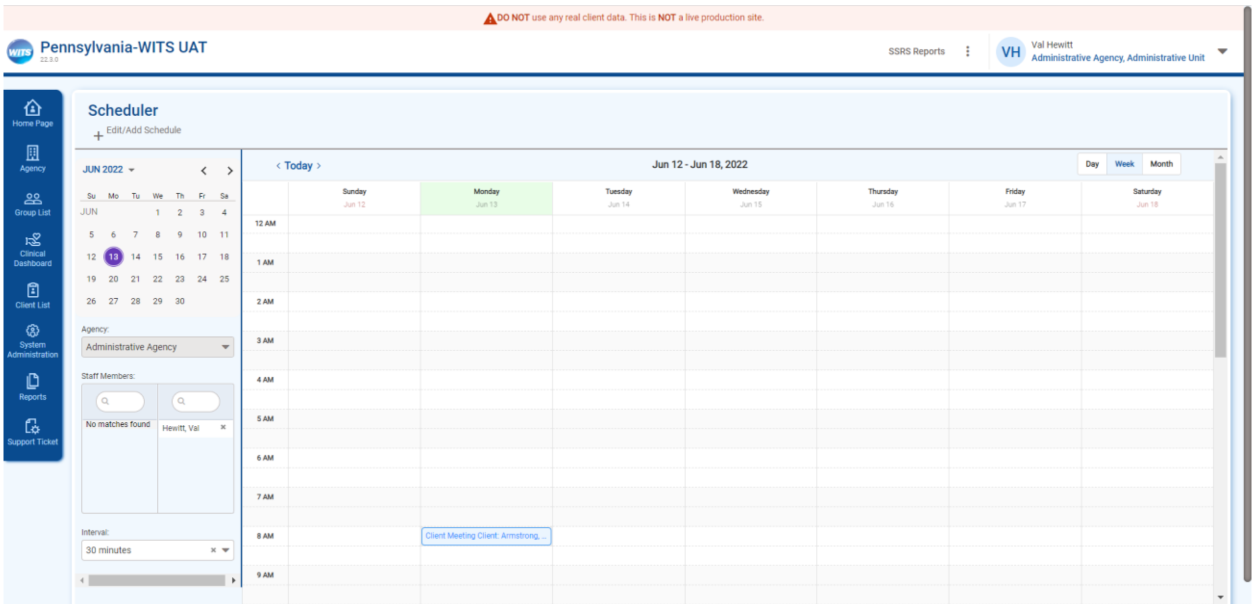
When you click **Edit/Add Schedule** in the right corner of the schedule part of the homepage, you will have three options to view your calendar.

Calendar day View:

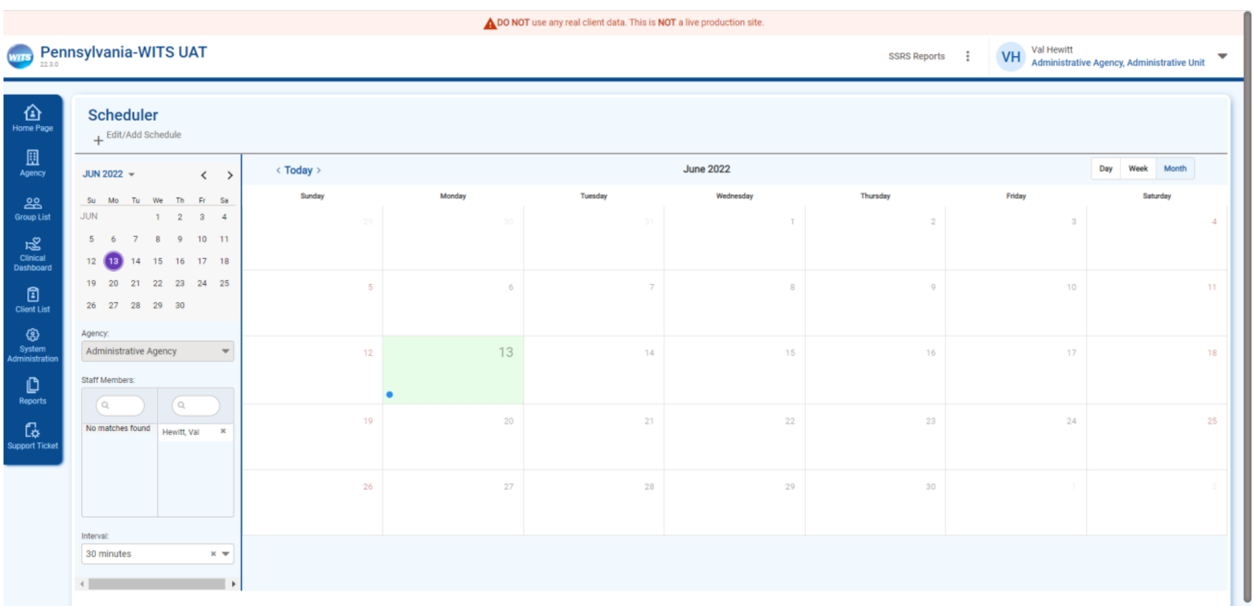


A. Click to add an appointment on the schedule.
B. Use the calendar to toggle between months.
C. Select the which user (or users) Calendar to view. The default view will be the user logged in.
D. An appointment on the calendar.
E. The date that is currently being viewed.
F. Click the buttons to toggle between the Month, Week, and Day view.

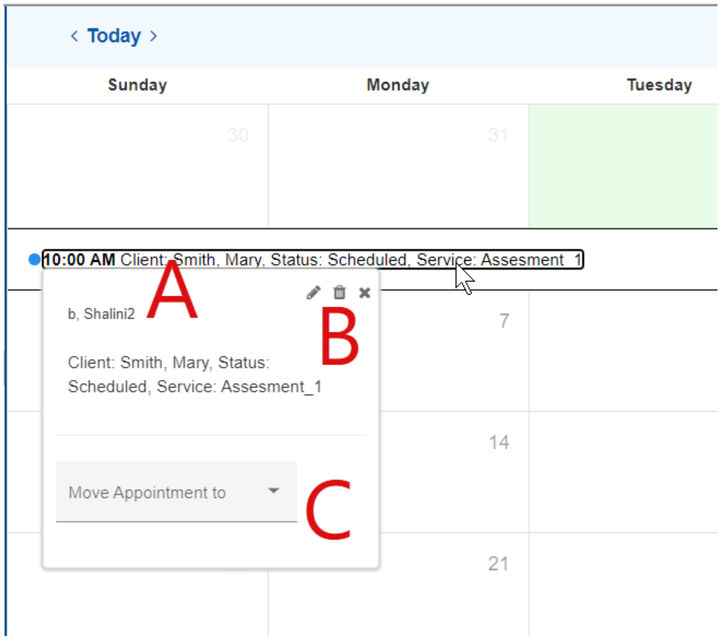
Calendar Week View



Calendar Month View



To see details on an appointment, click the date, and then click on the appointment link:



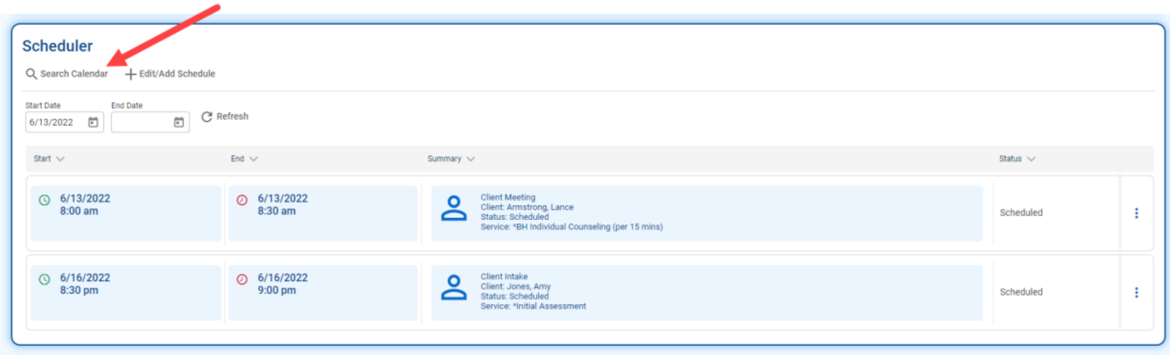
A. The name of the user who is scheduled for the appointment.
B. Links to edit or delete the appointment.
C. Drop down to move the appointment to another user's schedule.

3 Search for an Appointment

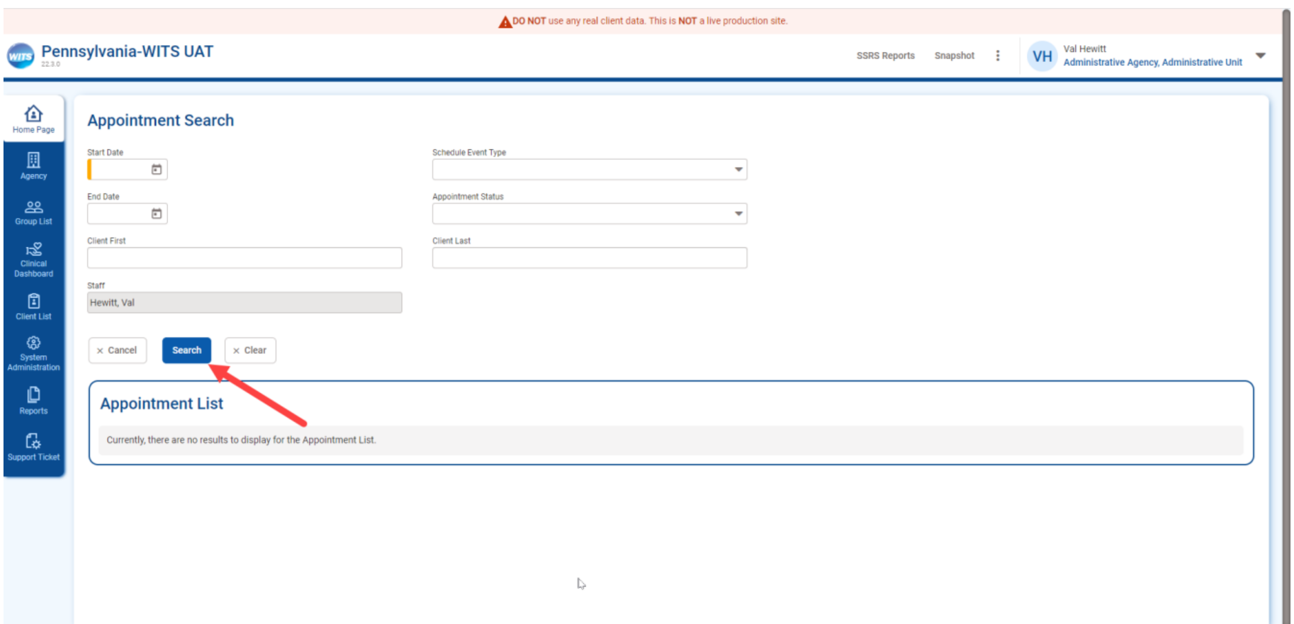
To quickly find an appointment, use the search to look for a date range, Event type, Appointment Status, Client Name, or Staff Name.

To use the search:

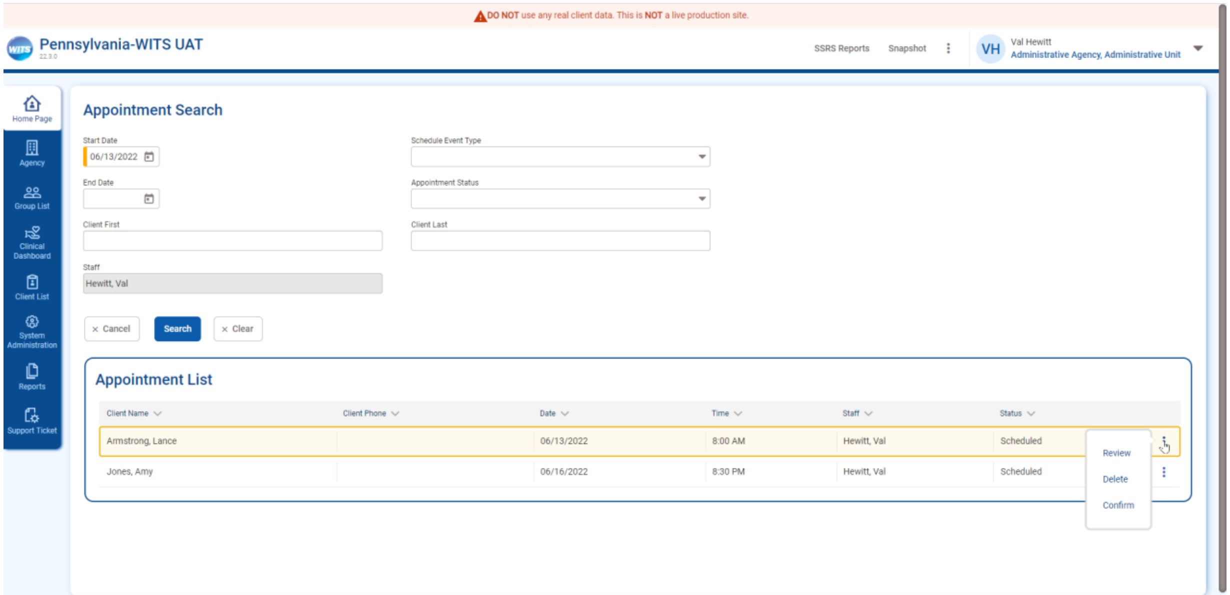
Step 1: Click **Search Calendar** in the upper right corner of the Schedule section of the Homepage.



Step 2: Use the Search fields to narrow down the appointment(s) being searched for. Click **Search**.



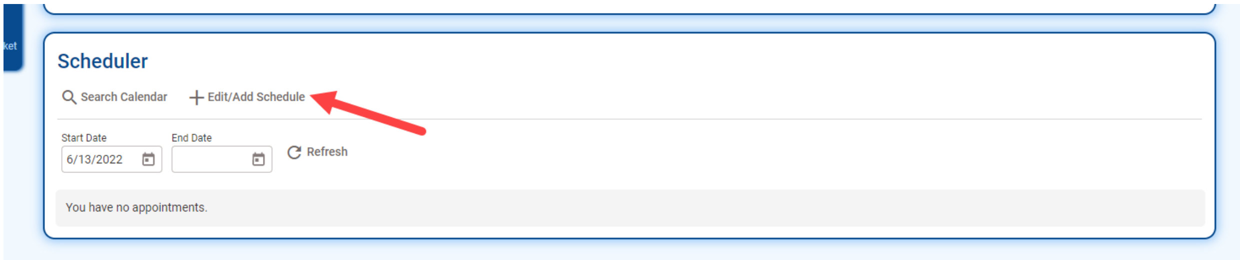
Step 3: From the Results, click on the pencil icon next to the appointment to **Review**, **Delete**, or **Confirm** the appointment.


DO NOT use any real client data. This is NOT a live production site.
Pennsylvania-WITS UAT
SSRS Reports
Snapshot
VH
Val Hewitt
Administrative Agency, Administrative Unit
Home Page
Agency
Group List
Clinical Dashboard
Client List
System Administration
Reports
Support Ticket
Appointment Search
Start Date
06/13/2022
Schedule Event Type
End Date
Appointment Status
Client First
Client Last
Staff
Hewitt, Val
Cancel
Search
Clear
Appointment List
Client Name
Client Phone
Date
Time
Staff
Status
Armstrong, Lance
06/13/2022
8:00 AM
Hewitt, Val
Scheduled
Jones, Amy
06/16/2022
8:30 PM
Hewitt, Val
Scheduled
Review
Delete
Confirm

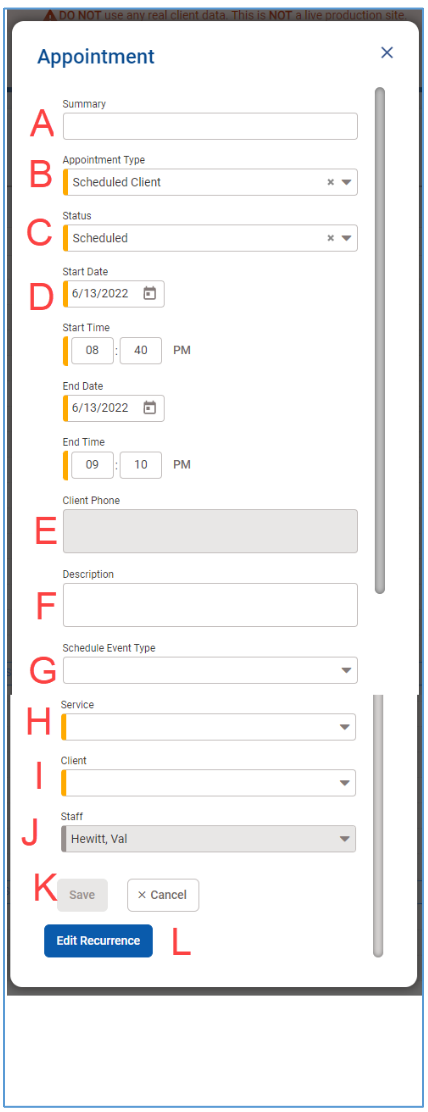
4 Create an Appointment

An appointment is created from the Homepage.

Step 1: Click **Edit/Add Schedule**.



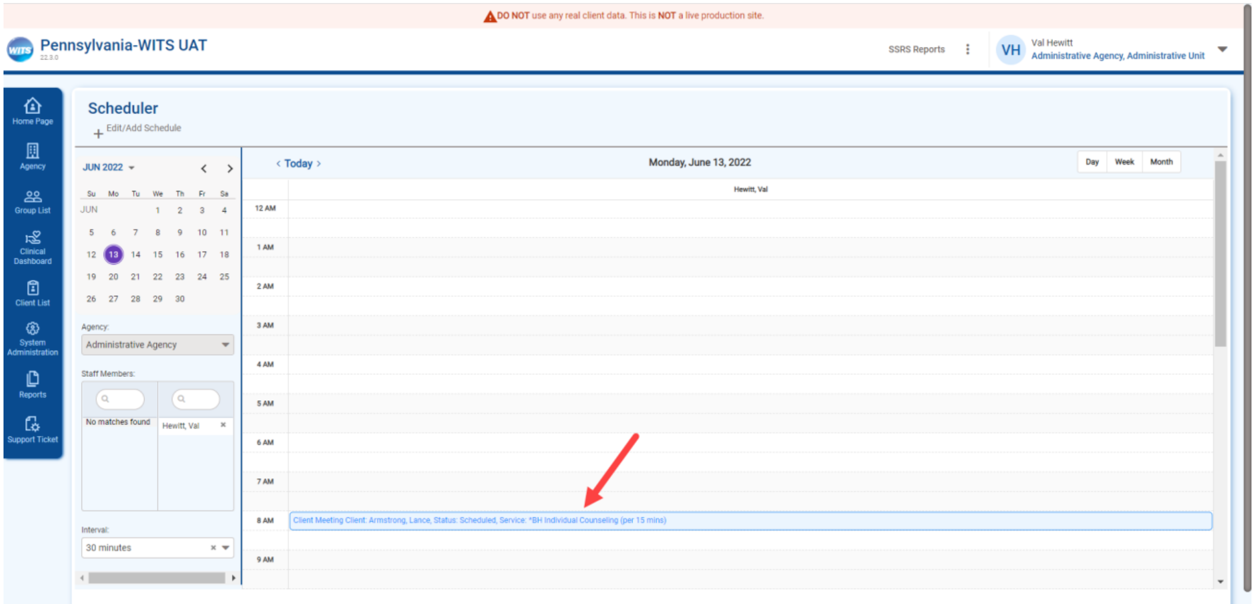
Step 3: The Add an Appointment window will appear. Fill out the information and click **Save**.



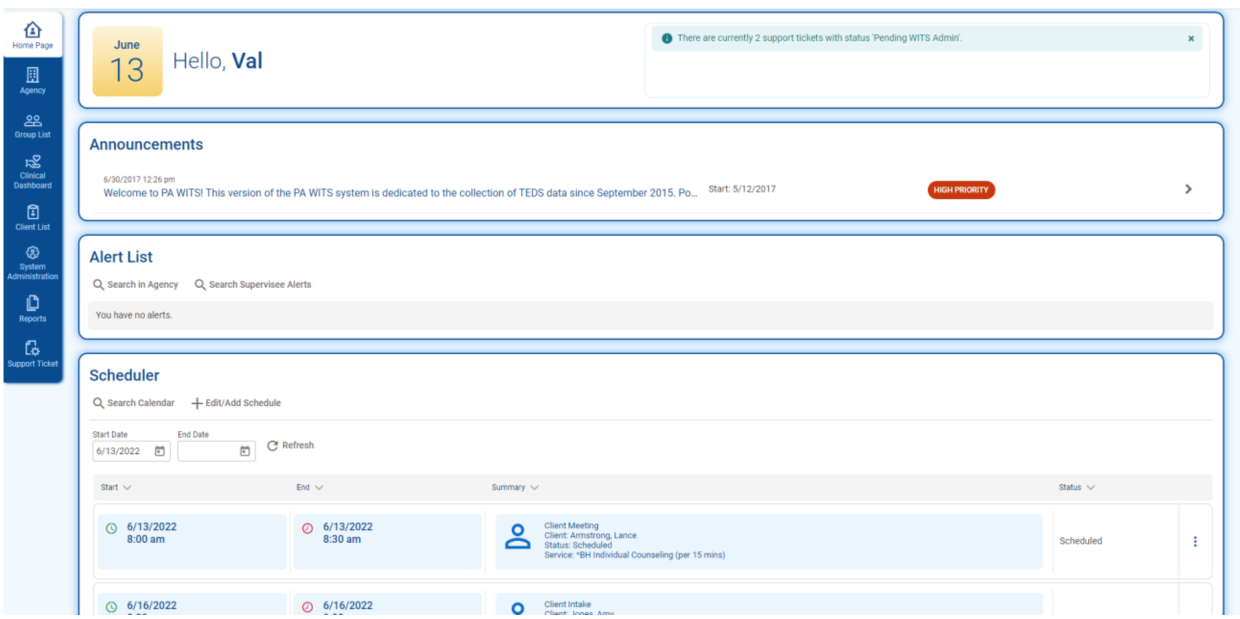
The appointment contains the following fields:

A. An optional summary of the appointment may be entered.
B. Appointment Type: This field categorizes the appointment and defaults to "Scheduled Client".
    - Normal: This type is used for scheduling non-client activities, such as vacation, meetings, etc.
    - Scheduled Client: This type is used to indicate a client appointment. The service and Client fields are required.
    - Scheduled Group: This type is used to indicate a group appointment. The Service and Group (no shown in screenshot) are required.
    - Reserved: This type is used to indicate appointment availability to the contractor agency. The contractor can subsequently view and fill the appointment. The provider subsequently knows the appointment is filled and who to expect. This functionality is typically used when there is a central intake and referral unit. Using this appointment type makes the Contracting Agency and Modality fields required.
    -
C. Status: This field indicates the status of the appointment (kept, canceled, no show, etc.) and defaults to "Scheduled".
D. Start date/time: The start date/time is required and defaults to the selected date/time.
   End date/time: The end date/time is required and defaults based on the selected interval.
E. Client Phone: When a client is selected, this field displays the client phone number(s) from the client profile.
F. Description: An optional detailed description of the appointment may be entered.
G. Schedule Event Type: This field categorizes the appointment (Treatment, Administrative, etc.). Values may be modified in the Schedule Event Type code table, cd_schedule_event_type.
H. Service: This dropdown displays a list of services and is required for the Scheduled Client and Scheduled Group appointment types.
I. Client: This field provides type-to-search, and displays the selected client. It is required for the Scheduled Client appointment type.
J. Staff: The name of the selected staff member is displayed.
K. Save: Click to save the appointment
L. Edit Recurrence: Set the appointment to recur on a daily, weekly, or monthly basis.

Once the appointment is saved, it will be listed on the schedule:



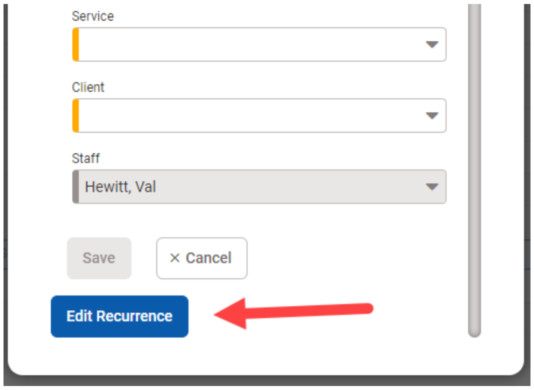
And will be shown on the homepage in the schedule:



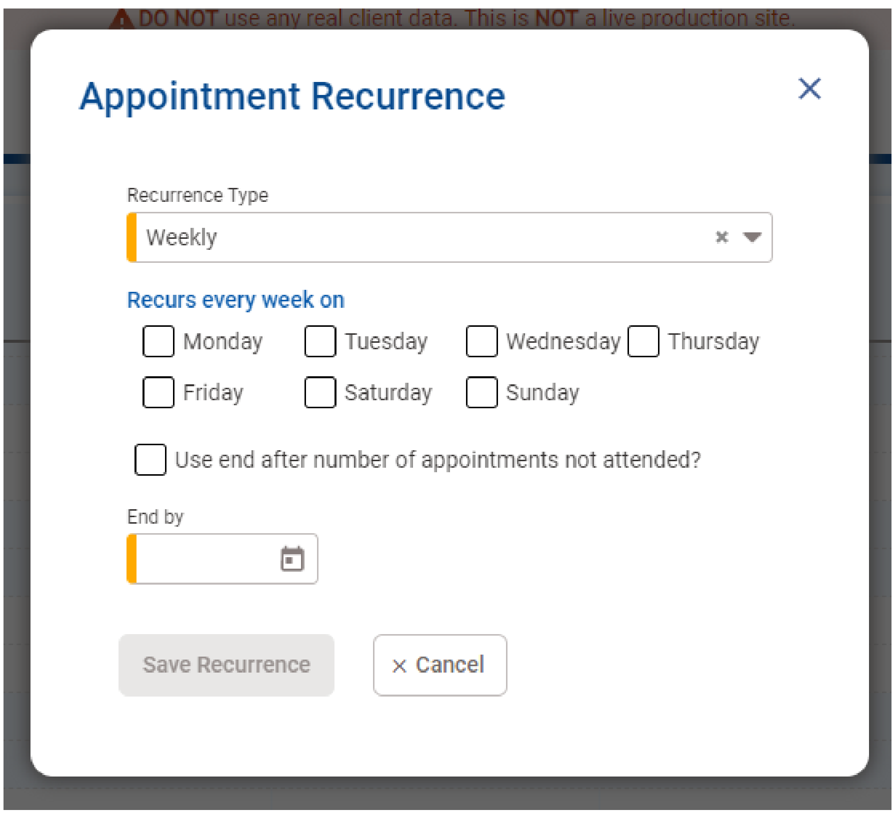
5 Create an Appointment with Recurrence

Meetings can be created so that they recur. To set up an appointment that will recur, follow the steps 1-3 above, but before clicking Save, Follow the steps below.

Step 1: After filling out meeting information, click **Edit Recurrence**.



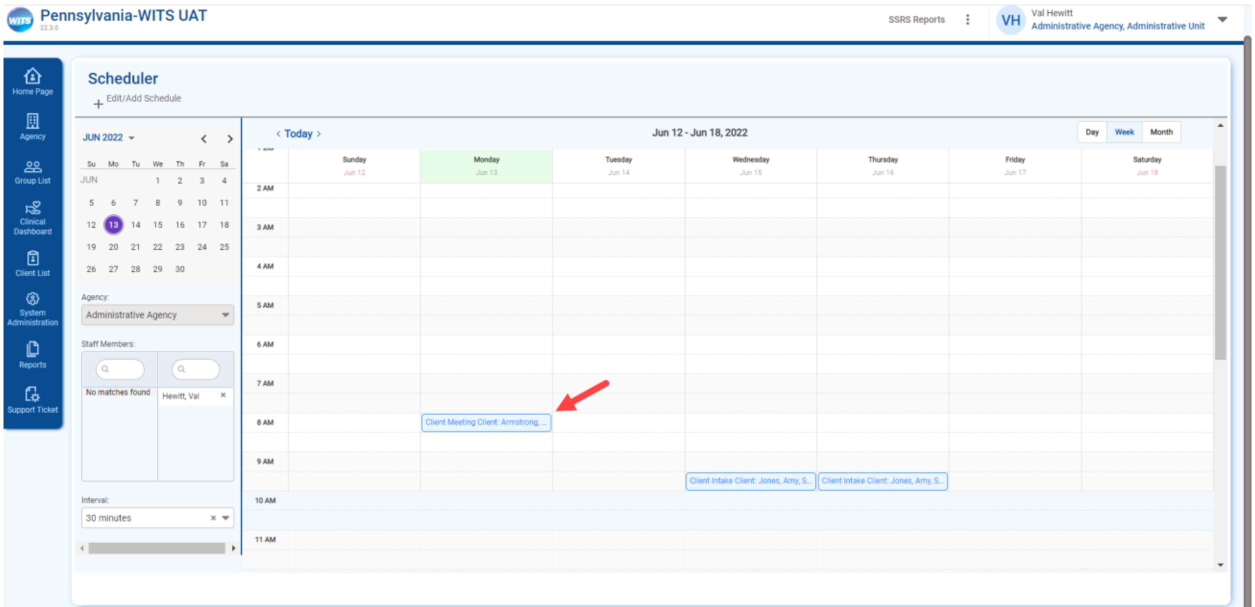
Step 2: Fill out the recurrence information.



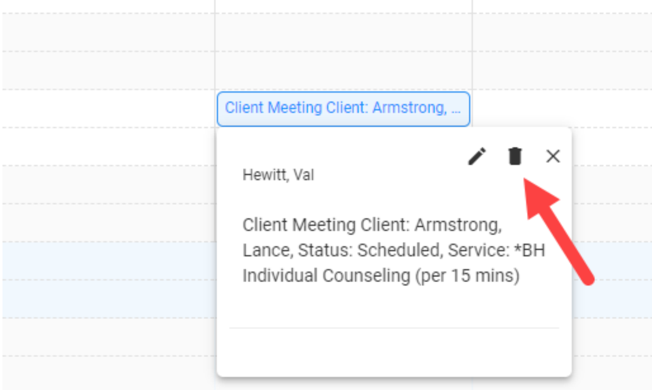
Step 4: Click **Save Recurrence**.

6 Delete an Appointment

Step 1: From the Scheduler, click the link for the appointment that you would like to delete.



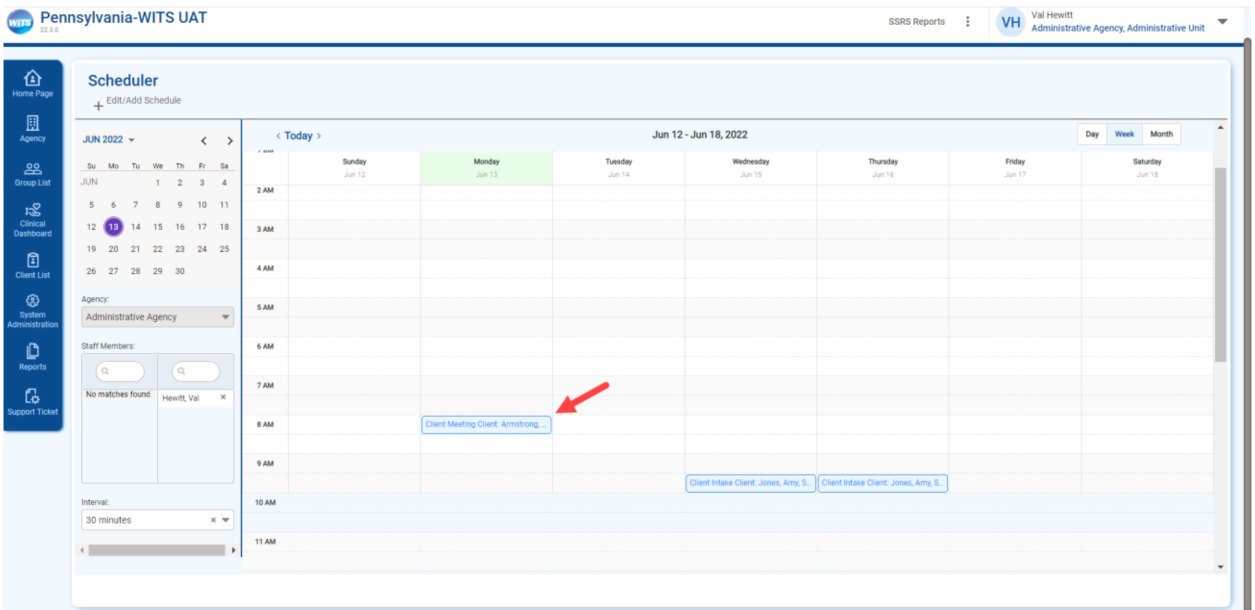
Step 2: This will open the appointment window. Click **Delete Appointment**.



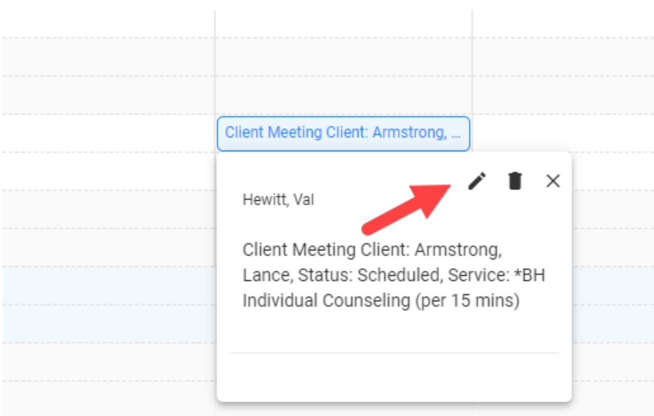
Step 3: Your appointment is deleted.

7 Reschedule an Appointment

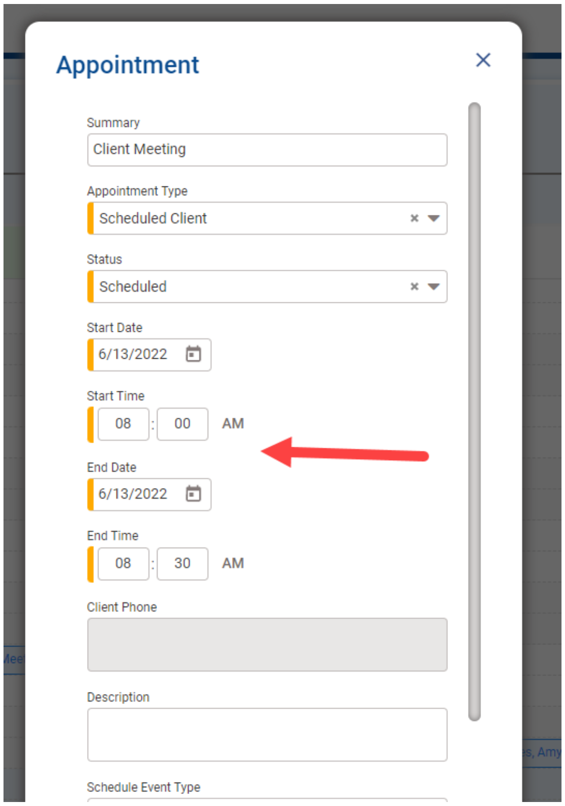
Step 1: From the calendar, click on the appointment that you would like to reschedule, This will open the appointment window.



Step 2: Click the pencil icon to edit the appointment.



Step 3: Make modifications to the date/time and click **Save**.

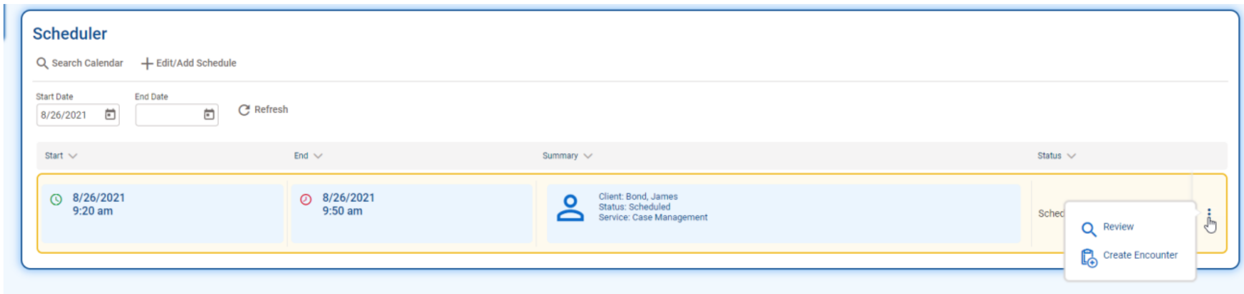


In addition, appointments can be dragged/dropped from one place on the calendar to another, if moving the meeting within the same day or week.

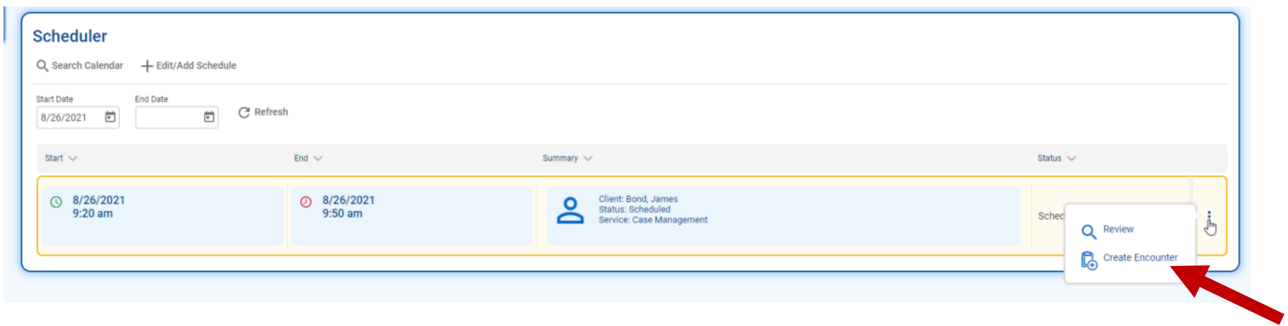
8 Create an Encounter from the Scheduler

Encounter notes can be entered for a client right from the scheduler.

Step 1: From the Homepage, hover over the pencil icon for the meeting that you would like to add an encounter for.



Step 2: Click **Create Encounter**.

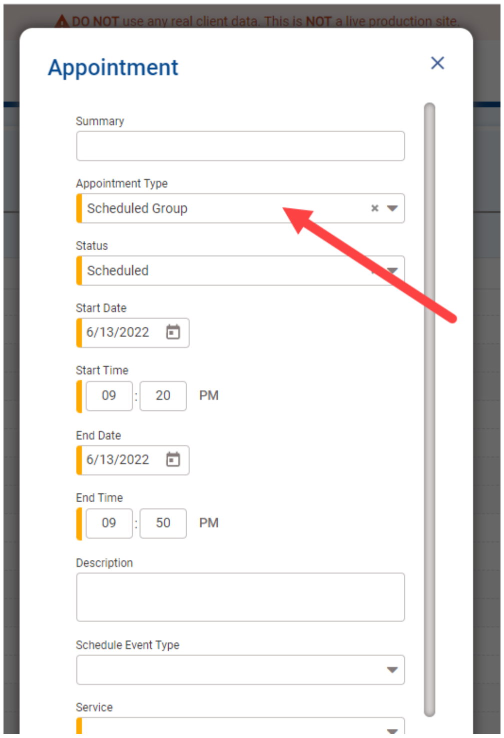


Step 3: This will open the Encounter screen. Fill out the information and click **Finish**. The same process can be completed to create a miscellaneous note by clicking on the **Create Miscellaneous Note** link.

9 Create a Group Appointment

Step 1: In the Scheduler, Click **Edit/Add Schedule**.

Step 2: In the Appointment window, select Group for Appointment Type.

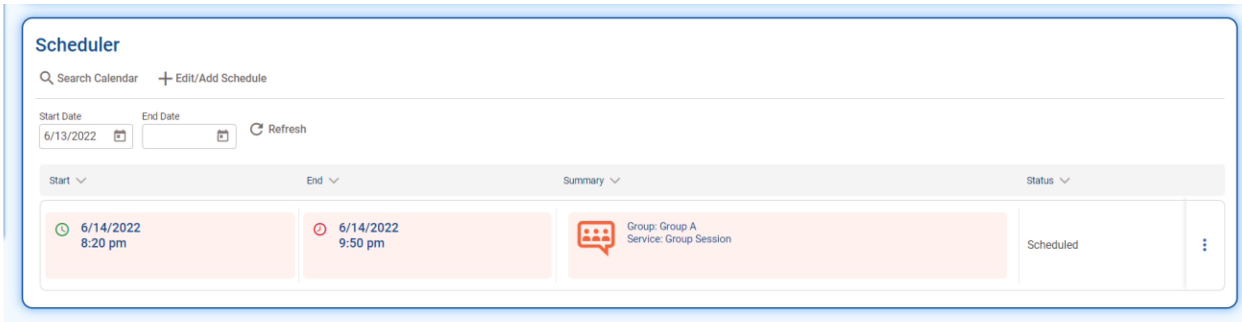


Step 3: Fill out the rest of the information on the appointment and click **Save**.

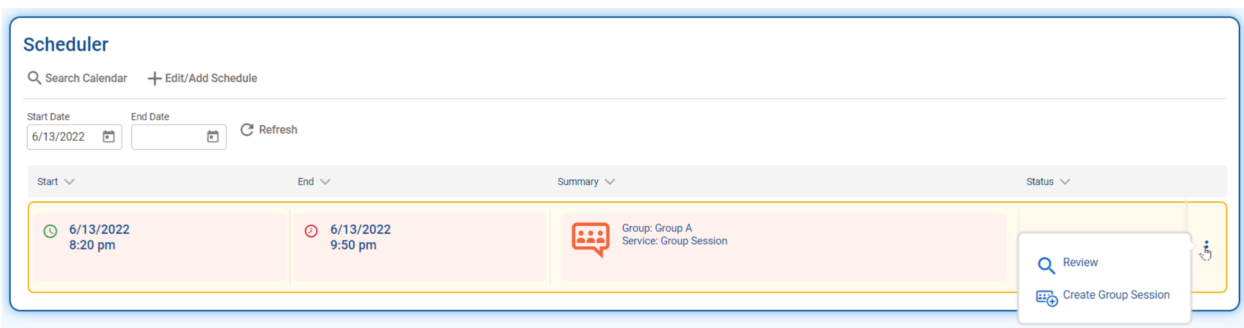
10 Create a Group Session from the Scheduler

Group Sessions can be entered for a group right from the scheduler.

Step 1: From the Homepage, hover over the pencil icon for the Group meeting that you would like to add a session for.



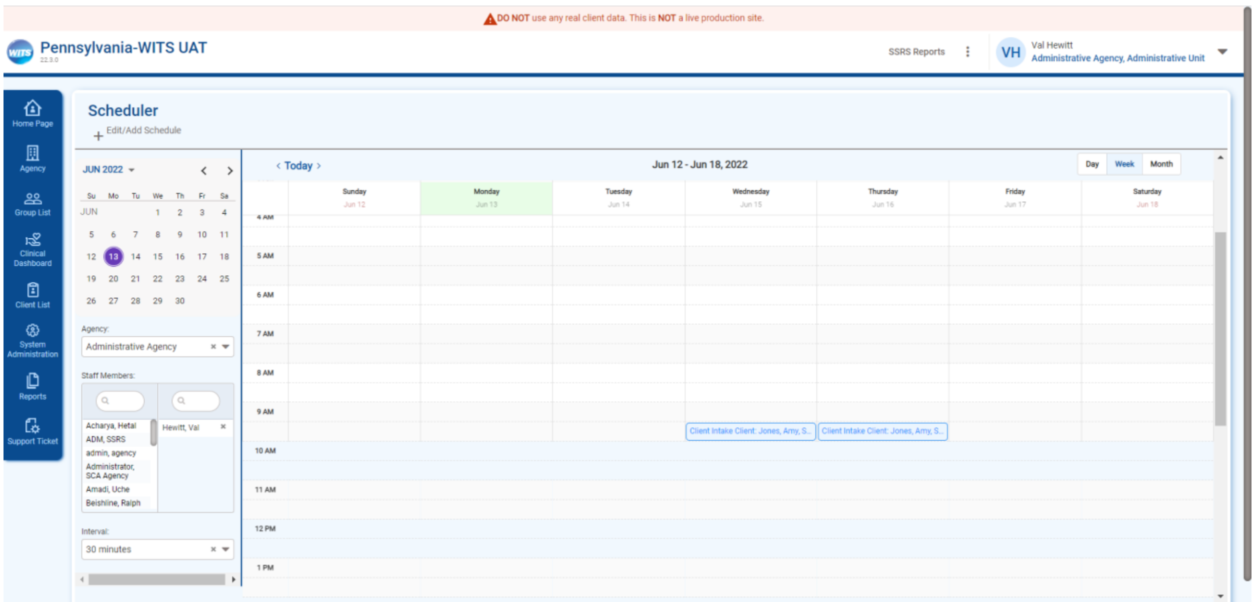
Step 2: Click **Create Group Session**.



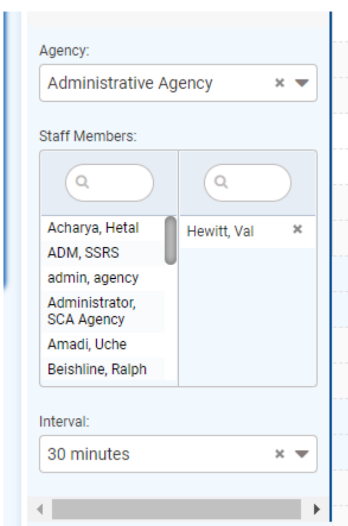
Step 3: This will open the Group Session screen. Fill out the information and click **Finish**.

11 Manage Staff Schedules

Users with the “Manage Staff Schedules” role are able to view and select other staff members by using the mover box on the left side of the scheduler. The schedule may be viewed by day, week, month, or timeline (schedule view). A specific date may be selected by clicking the calendar icon. Page navigation is available by clicking the arrows on either side of the calendar icon. The “Today” link brings the calendar display back to today’s date. Appointments may be dragged/dropped from time to another and from one staff member to another.

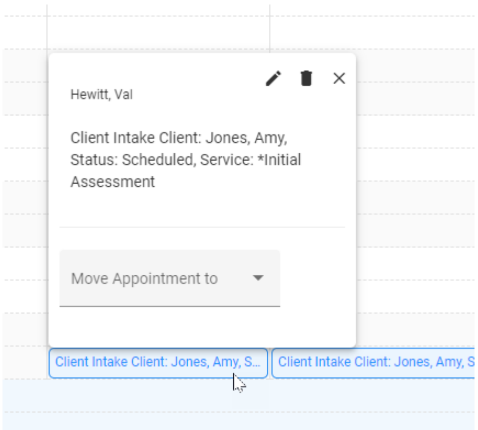


To see more than one staff member’s schedule at a time, use the mover box by double click the name of the staff member to view their schedule.

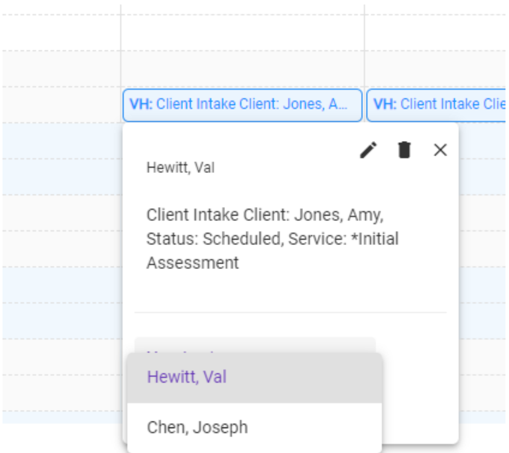


Appointments can be moved from one staff member to another by clicking the appointment link and accessing the summary information:

Step 1: Click the down arrow next to Move Appointment to.



Step 2: Select the staff member to transfer the appointment to.



Step 3: That appointment will now be on the new staff member's schedule.