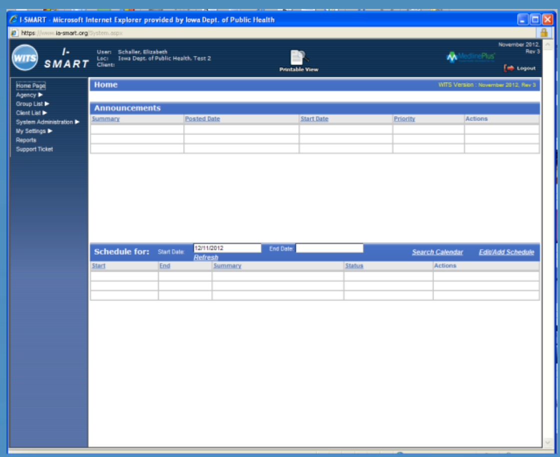
Home Page



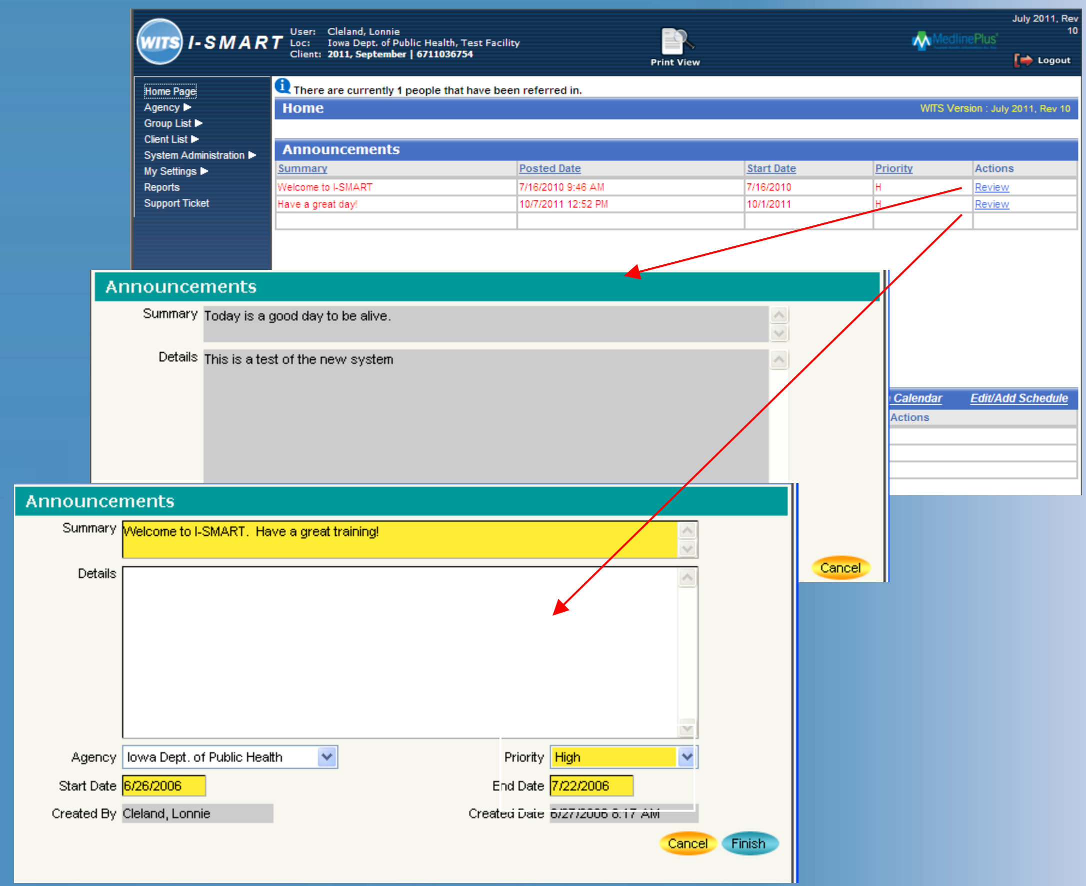
- ✓ Announcements
- ✓ Schedule

Home Page

Announcements

1. **Announcements:** This table allows the system and agency administrators to broadcast information to the I-SMART community. The agency administrator can only send information to their assigned agency and the system administrator can send information to all I-SMART users.

1. **Review** to access the **Announcements** screen. If you are the author, you will have the ability to edit announcements. If you are not, you may view the details of the **Announcement.**



SCHEDULING MODULE

- ✓ Scheduling

Scheduling

This section allows an individual, or a central schedule to view and modify their own or other schedules, depending on their security role.

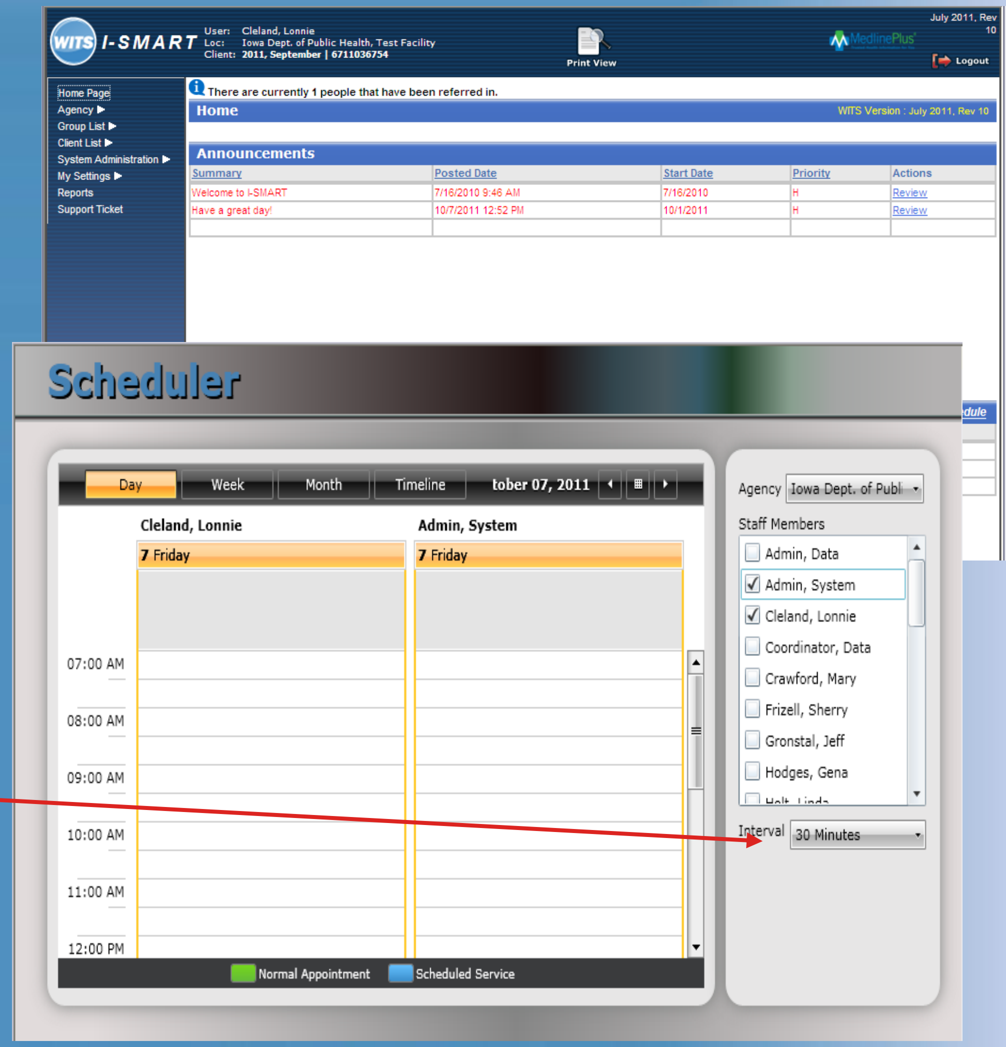
1. To enter the Scheduling module click the ***Edit Schedule*** hyperlink

2. It brings up a screen that shows one day's schedule for the staff member chosen in the **Available Staff Members** box.

3. Depending on your security role, you will have the option of editing your own schedule, or other peoples schedules. This example shows the schedule for "Conrad, Rodney"

4. To add an event, click on the time that you would like to schedule that even for.

5. Note, there is an **Interval** drop down that allows you to change the increments of the schedule.



Scheduling

6. Placing the cursor on any particular calendar timeframe, then left-double-clicking , will open the **Schedule Edit** screen. This screen allows you to add details about the scheduled event.

7. If the event is a **Scheduled Encounter**, then you can add details about the encounter.

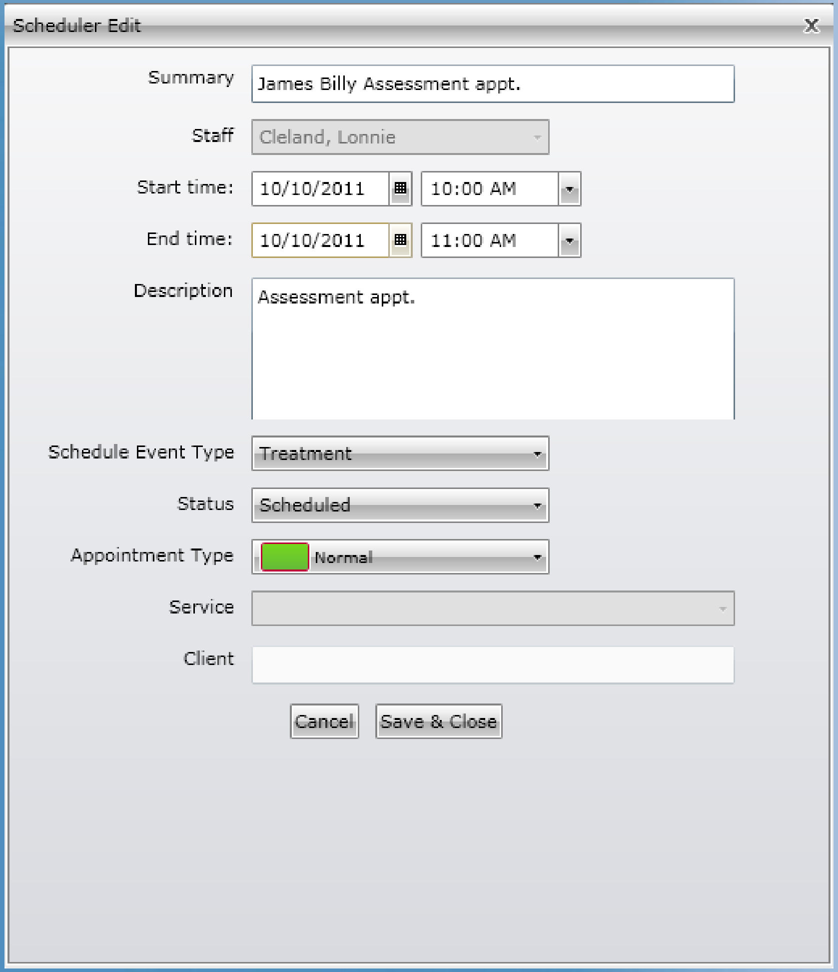
8. The Summary field will show that text in the appropriate time block on the scheduler screen.

9. The user can choose the appropriate Schedule Event Type (Treatment, Admin, Personnel).

10. Status shows several status choices including scheduled, no show, and confirmed.

11. Appointment type Normal allows the user to enter never - seen client info.

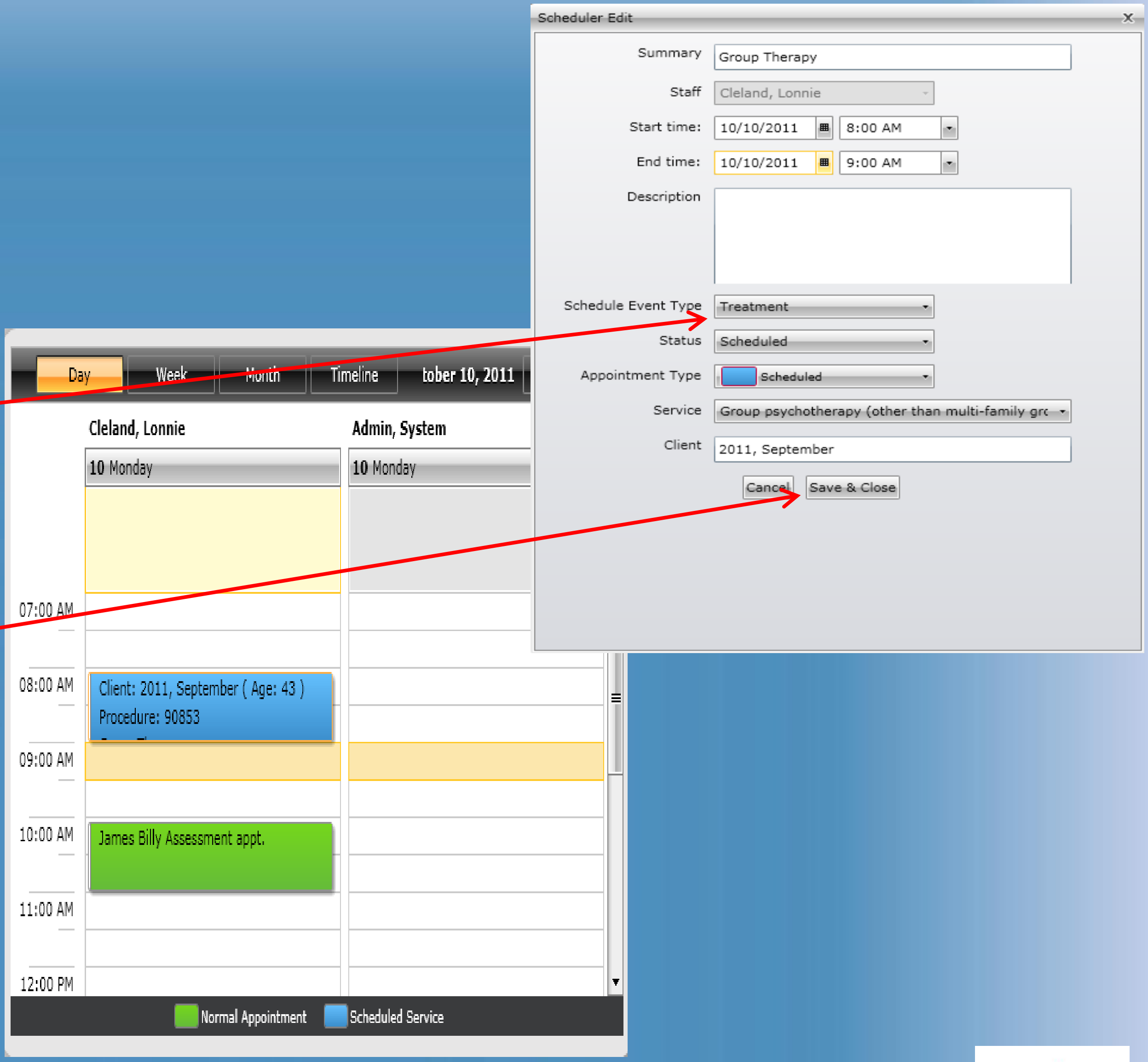
12. Save & Close closes the **Schedule Edit** screen and redisplays the calendar with the event added.



6. Scheduling events in this manner allows the user to schedule and see events for several users over a daily, weekly or monthly time period.

7. After opening a specific time interval, choosing Scheduled from the Appointment Event Type drop down will require the user to enter an already-existing client name into the Client field. It also allows the user to choose the Service for which the client is being seen.

8. **Save & Close** closes the **Schedule Edit** screen and redisplays the calendar with the event added. Notice the color and information difference between Normal and Scheduled events.



Scheduling

9. After leaving the scheduling module, the **Today's Schedule** section of the **Home Page** now reflects the events for today.

10. You will notice in the example, that since the event was an Encounter, you can create the encounter directly from the schedule. Because the assessment scheduled on line 2 of the schedule is for a person who is not a client yet, there is no Create Encounter link.

11. The Scheduler contains both Search and Refresh functions.
    - ***Refresh*** link will refresh the screen to show appointments scheduled for the date range entered in the Start and End Date fields.
    - The ***Search Calendar*** feature will open the Search screen that enables users to search scheduler for any appointments by date range, staff name, appointment status, event type and client name.