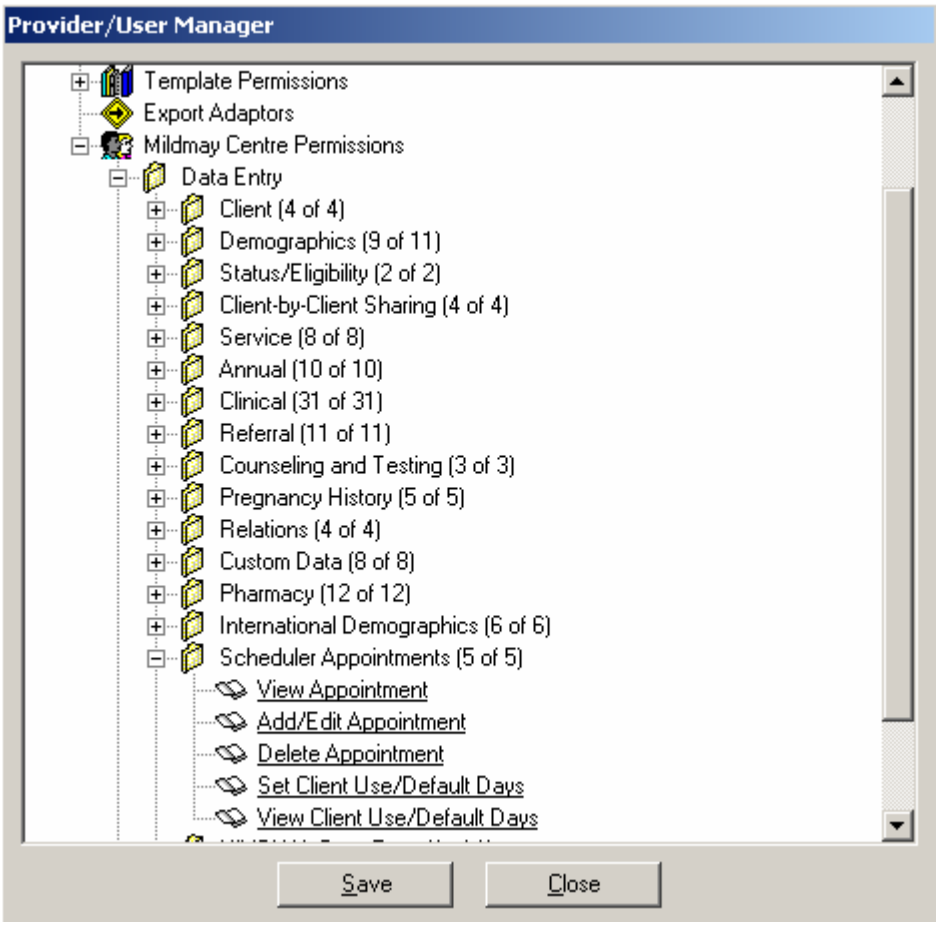
# How to use the CAREWare Appointment Scheduler

## Appointment Scheduler

To use the scheduler, first make sure you've been granted the rights to use it.

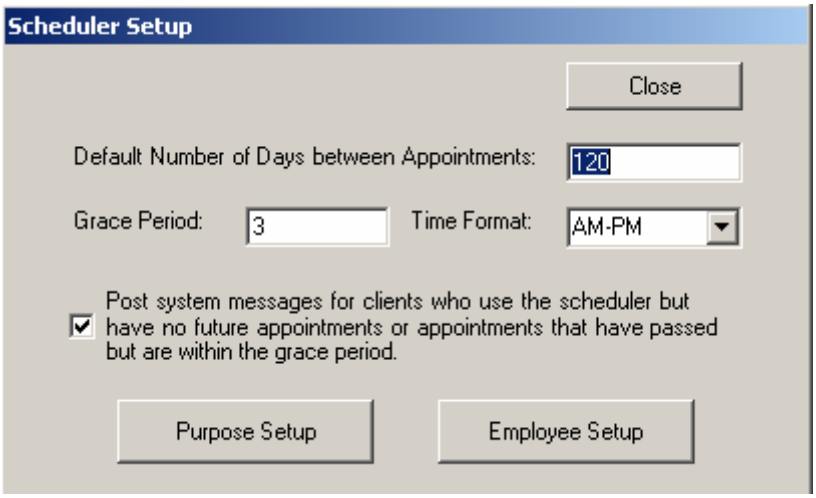
1. Login under Central Administration:
2. Go to Administrative Options> Provider/User Manager.
3. Under your Provider's Name, click on the 'Data Entry' node and make sure the 5 rights under Scheduler Appointments have been granted, as in this screen shot.




- Remember, right click any of these entries to revoke (or grant) that specific right.
- After granting the Provider these rights, ***don't forget to give a specific user these rights*** under the Data Entry and Administration nodes in the Provider/User manager.

- Now you're ready to setup the Scheduler defaults. You should do this in your Provider Domain.

- Go to Administrative Options > Scheduler Setup. The following screen will appear:



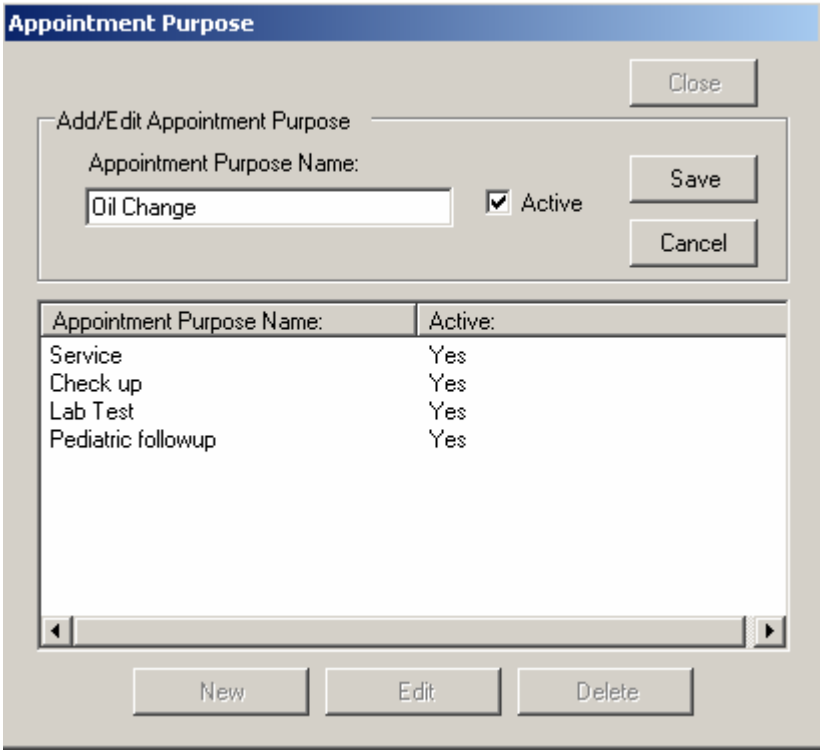

Complete the following fields:

- *The default number of days between appointments*. CAREWare will automatically schedule another visit in the designated number of days.

- *Grace Period*: This is the number of days after which, upon logging in, CAREWare will automatically set the visit status from **Pending** to **Missed**.

- *Employee Setup*: Select this box to add clinic employees to the list. Visits can be scheduled with individuals, and reports generated to show which patients are scheduled to see each clinician.

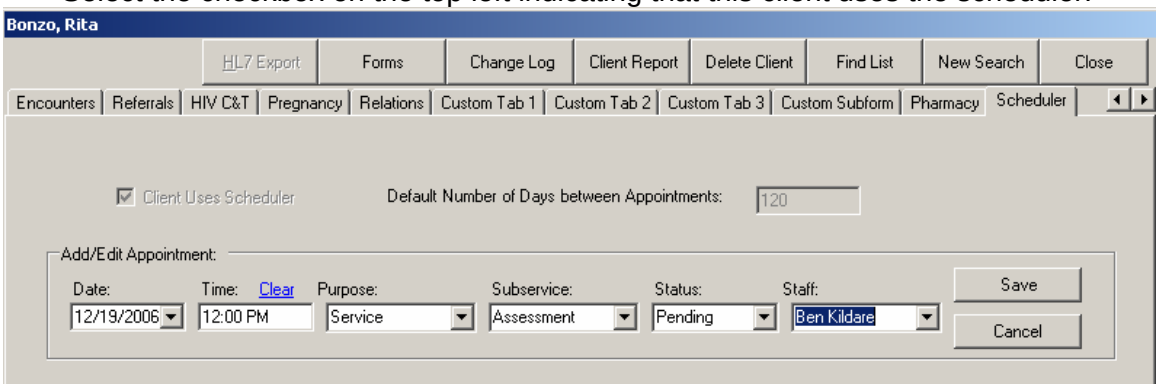
- *Purpose Setup*: The following screen will appear. Simply add the visit purpose; don't forget to click the Active checkbox.




**Using the Scheduler**

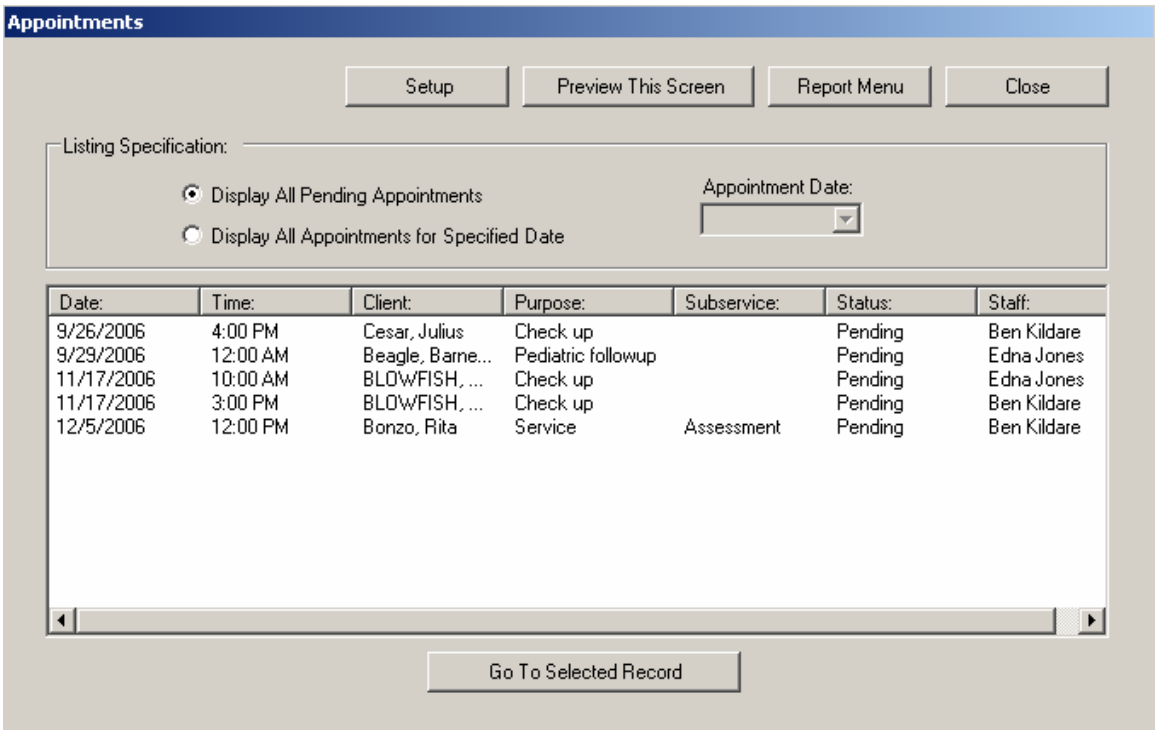
To start scheduling, go to a client record of interest and select the Scheduler tab. (The Scheduler tab may appear on the far right, and you may need to scroll to it depending on how many tabs appear.)

- Select the checkbox on the top left indicating that this client uses the scheduler.




- Enter the appropriate information for the next appointment and then click Save.

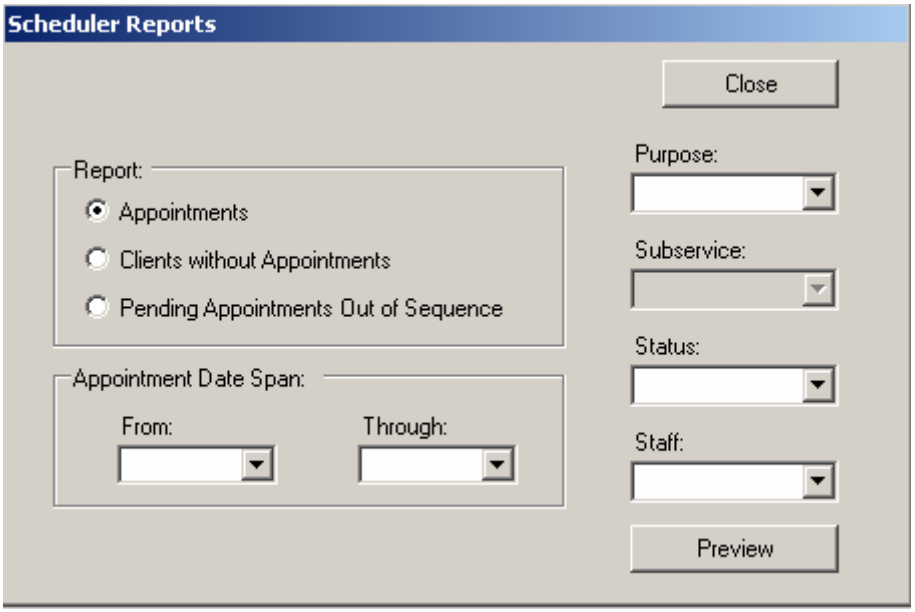
- On the Main Menu select “Appointments” and the following screen will appear showing all outstanding appointments.




From this screen we can:

- Preview all pending visits by clicking the Preview this screen button. We could also 'Display All Appointments for a Specified Date" (maybe we want to generate a list for tomorrow's clinic activities.)

- Further reports are available by selecting the Report Menu button on the top. The following screen will appear:




- Any number of options for selecting specific appointments are available here.