



# How to Use the Scheduler



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Your Scheduler is the organization hub for your Clients' care. You can view **your Clients' schedules** week by week, in one calendar.

It allows you to efficiently **manage your Clients' weekly visit schedules**. Once these are set, you can notify all Carers and Family members with one click instead of contacting each one directly.

The **interactive calendar** simplifies the task of scheduling new visits by allowing you to drag-and-drop a Carer's name directly onto the calendar. Reschedule or update existing visits with a simple click. With every Client's schedule at your fingertips, you **don't need to access each Client's profile separately**, to create a schedule.

Seamless automation of these Schedules allows Carers and Clients to work off the same **up-to-date** schedule which **fully integrates with Timecards** for payroll.

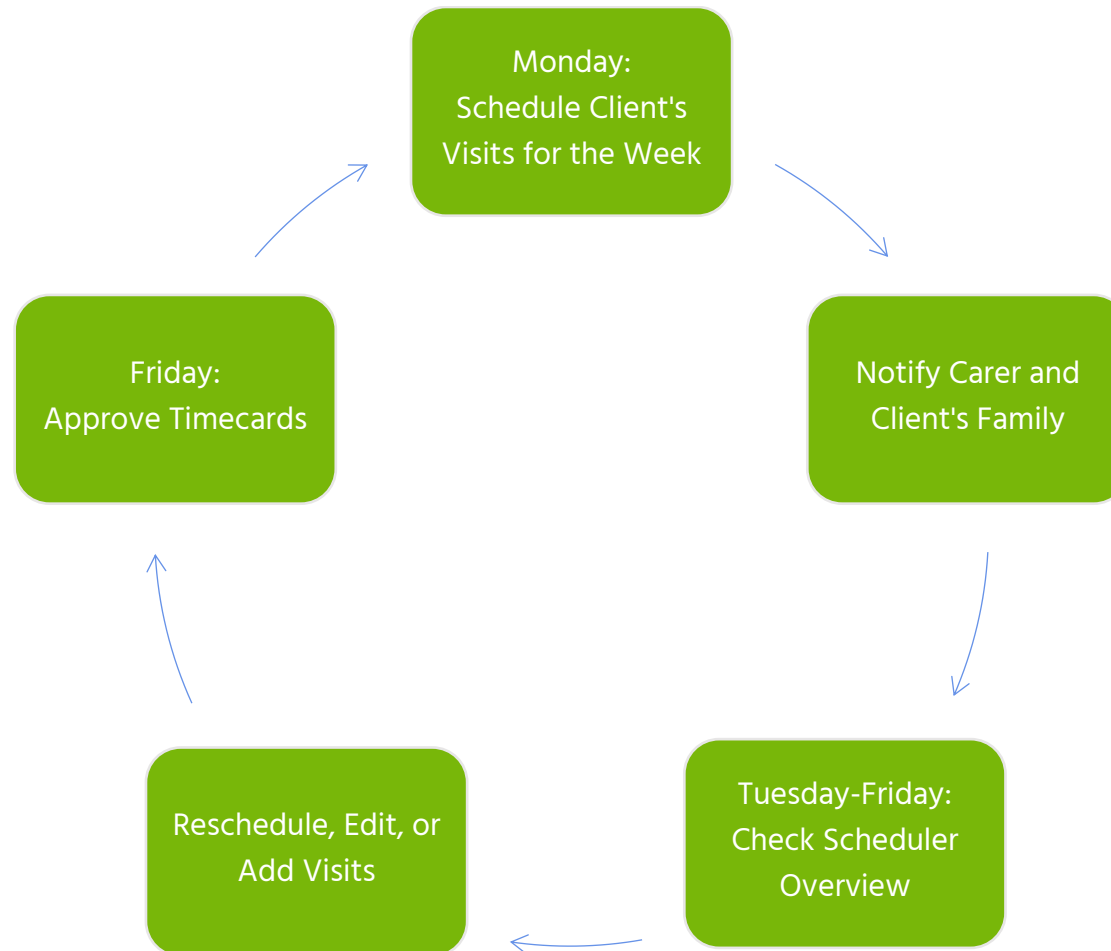
Using the Scheduler helps you manage your time more efficiently and reduces paperwork.

So let's get started!

### Benefits of the Scheduler

- ✓ Clients' Schedules
- ✓ Interactive Calendar
- ✓ Improves Efficiency
- ✓ Reduces Paper Use
- ✓ Integrates with Timecards

The Scheduler helps you manage the workflow



### 3 How to Use the Scheduler

#### Using the Scheduler

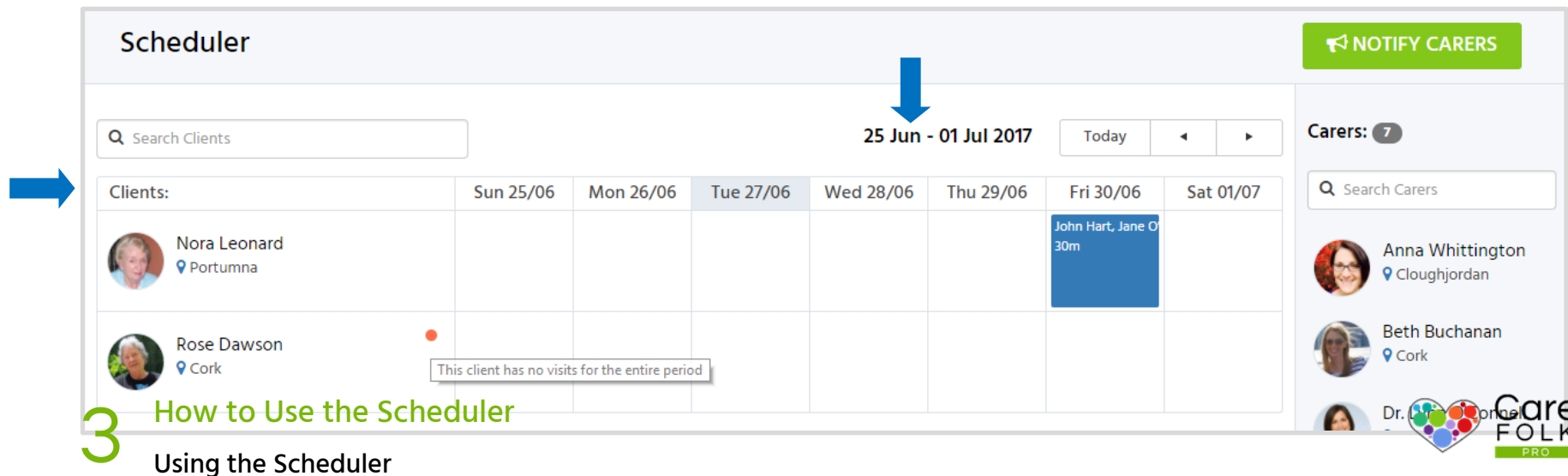
## Scheduler Overview

View the **complete overview** of your Clients' visit schedules for the selected week. Use the arrows to **toggle between weeks**.

**Note:** A red dot next to a Client's name indicates that the **Client has no visits scheduled** for the week.

A list of the **Company's Carers** on the righthand side makes it easy to find a Carer to add to a Client's schedule.

**Note:** This will be the full list of Carers, including any Carers marked as **Unsuitable** for a specific Client.





**Scheduler**

NOTIFY CARERS

25 Jun - 01 Jul 2017 Today




Search Clients

Clients:	Sun 25/06	Mon 26/06	Tue 27/06	Wed 28/06	Thu 29/06	Fri 30/06	Sat 01/07
 Nora Leonard Portumna						John Hart, Jane O 30m	
 Rose Dawson Cork							

This client has no visits for the entire period


Carers: 7

Search Carers

-  Anna Whittington  
Cloughjordan
-  Beth Buchanan  
Cork
-  Dr. L. O'Brien

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Using the Scheduler



## View or Edit Scheduled Visits

It's easy to view or edit scheduled visits in the Scheduler. Click on an **existing visit** to see:

Mon 26/06	Tue 27/06	Wed 28/06	Thu 29/06	Fri 30/06	Sat 01/07
<b>Care Visit:</b> <span>⚙️</span> <span>✕</span>				John Hart, Jane C 30m	
<b>Carers:</b> <span>👥</span> John Hart , Jane O'Leary					
<b>When:</b> <span>📅</span> Fri 30/06/17 <span>🕒</span> 08:30am - 09:00am					
<b>Client:</b> <span>👤</span> Nora Leonard <span>☎️</span> 0214545554		<b>Primary Carer:</b> <span>👤</span> Catherine Gates <span>☎️</span>			
<b>Where:</b> <span>📍</span> 10 Dominic Street, Portumna					



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#### Using the Scheduler

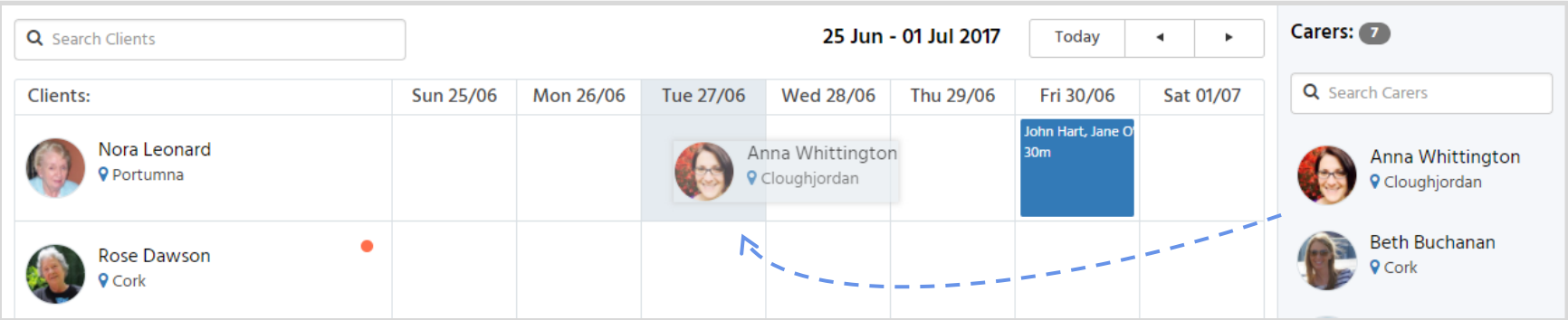


## Schedule a Carer for a Client Visit



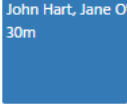

In the **Scheduler**, find the Client by typing the **Name** into the search box or by browsing through the **list of Clients**.

Then click on the desired **Day** on the calendar.

Finally, **choose a Carer** from the Carers List on the righthand side. **Drag and Drop a Carer's picture** onto the Client's calendar.



The screenshot displays a scheduling interface. At the top, there is a search box for clients and a date range of 25 Jun - 01 Jul 2017. Below this is a calendar grid with columns for days from Sun 25/06 to Sat 01/07. A client list on the left shows Nora Leonard (Portumna) and Rose Dawson (Cork). A carer list on the right shows Anna Whittington (Cloughjordan) and Beth Buchanan (Cork). A blue arrow points to the search box. A dashed blue arrow indicates a carer being dragged from the list to a client's calendar slot.

Clients:	Sun 25/06	Mon 26/06	Tue 27/06	Wed 28/06	Thu 29/06	Fri 30/06	Sat 01/07
 Nora Leonard Portumna			 Anna Whittington Cloughjordan			 John Hart, Jane O 30m	
 Rose Dawson Cork	●						

# 3 How to Use the Scheduler

## Using the Scheduler



### Add a New Care Visit

Complete the information for a Care Visit including:

- **+Add Carer:** Choose at least one name from the dropdown. To **add multiple Carers** to one visit, select **+Add Carer** again. **Remove a Carer** by hovering over the **X** next to the name.
- Type the date or use the calendar for the **Start Date**. Use the arrows to adjust the **Start Time**.
- Type the date or use the calendar for the **End Date**. Use the arrows to adjust the **End Time**.
- Select whether the visit is a **One Time** visit or a **Repeat**. If it is a Repeat, choose the frequency from the dropdown.
- Add any **Notes** or requirements for the visit.

The screenshot shows a web form titled "Add New Care Visit" with a close button (X) in the top right corner. At the top, there is a dropdown menu labeled "+ Add Carer" with a downward arrow. Below this, a carer named "Anna Whittington" is listed with a small profile picture and a red 'X' icon to her name. The form then has two rows for date and time selection. The first row is for the "Start Date" and "Time", with the date set to "27/06/2017" and the time set to "02 : 30 PM". The second row is for the "End Date" and "Time", with the date set to "27/06/2017" and the time set to "03 : 00 PM". Below the time selection, there are radio buttons for "One time" (which is selected) and "Repeat", followed by a dropdown menu. At the bottom of the form is a "Note:" section with a text area containing the placeholder "Type something". In the bottom right corner, there are "Cancel" and "SAVE" buttons.

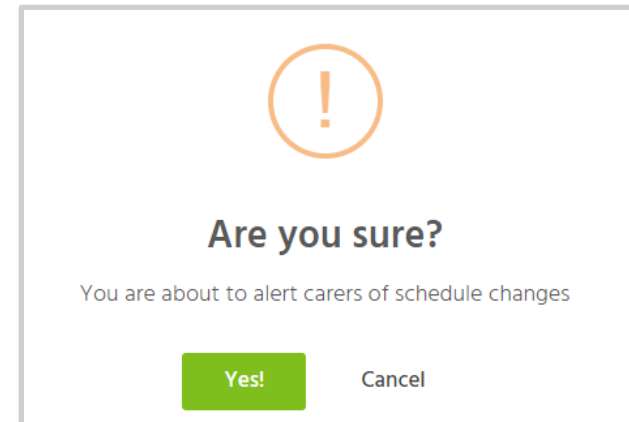


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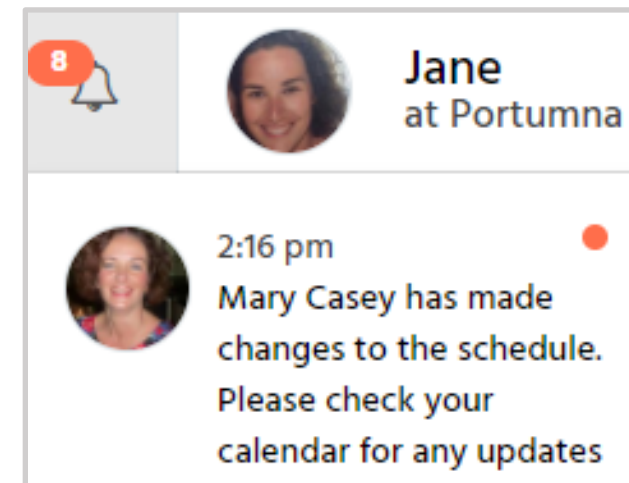
#### Using the Scheduler

#### Notify Carers and Family Members

Once the schedule has been set for the week, update the Carers and Family by sending out an alert. Click **+Notify Carers** and then **Yes!** From the pop-up screen.



When Carers and Family members sign in, they will **receive a notification** about the changes. To view the updated schedule, they can either **click on the notification** or visit **Schedule** under their own profile.



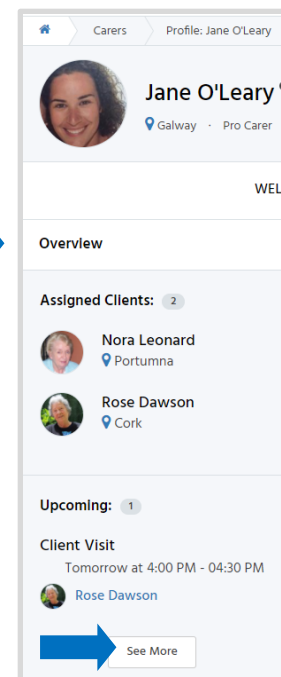
# 4 How to Use the Scheduler

## View from the Carer's Perspective



### From the Carer's Perspective

When signed in, a Carer's Dashboard shows their **Assigned Clients** and any **Upcoming Visits** under **Overview**. They can view their **full schedule** by clicking on **See More** or visiting their **Schedule** from the profile.



Schedule										
Today	<	>	June, 2017				Day	Week	Month	+ ADD
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday				
28	29	30	31	01	02	03				
04	05	06 Jane O'Leary ...	07 Dr. Lynn	08	09 Dr. Lynn	10				
11	12	13	14	15	16 Anna ...	17				
18	19	20	21	22	23 Anna	24				

When Carers sign in and out for Scheduled Visits with Clients, **it automatically populates their Timecard**. When their Timecard is ready to be approved, the Carer logs on and submits it to their Manager. For more information about Timecards see **Manage Timecards** or **Submit Timecards**.