



How to Use the Scheduler



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1 How to Use the Scheduler

Introduction

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.

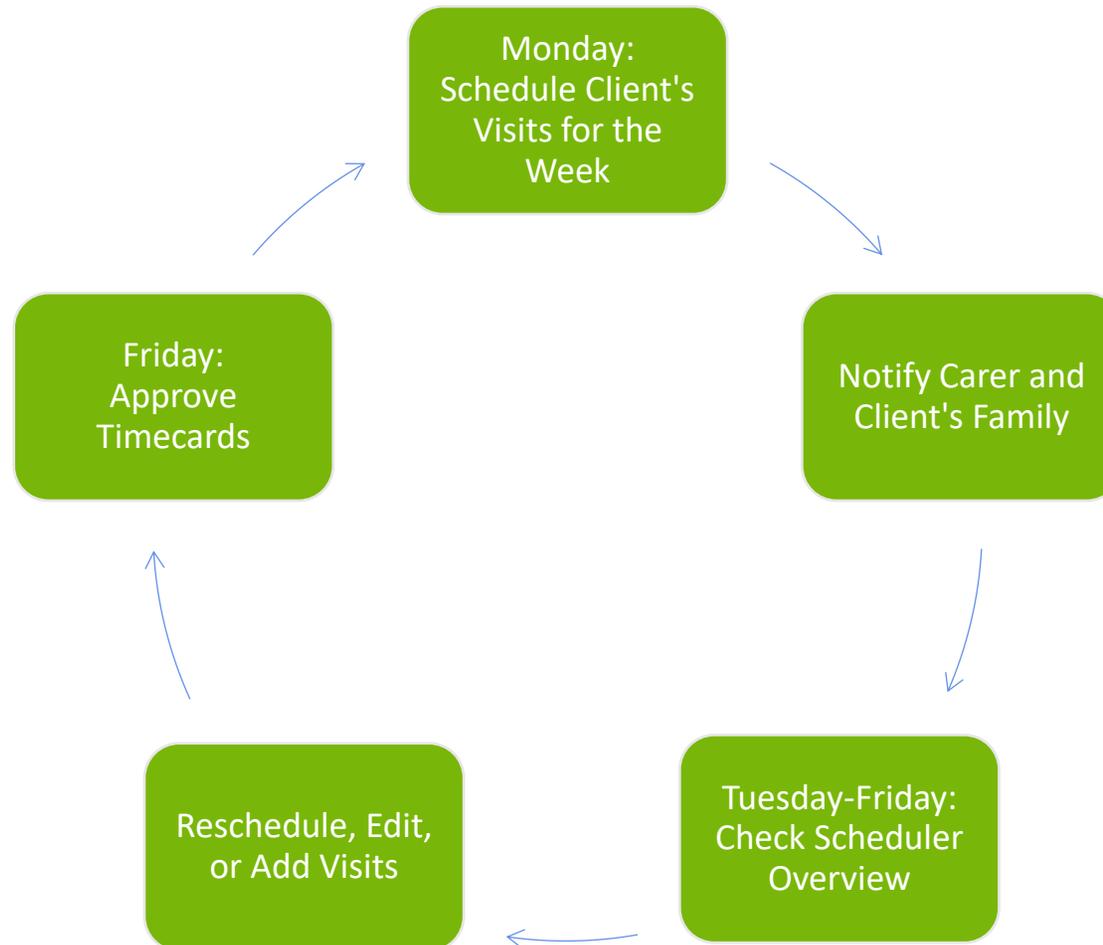
Benefits of the Scheduler

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

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Schedule Workflow

The Scheduler helps you manage the workflow



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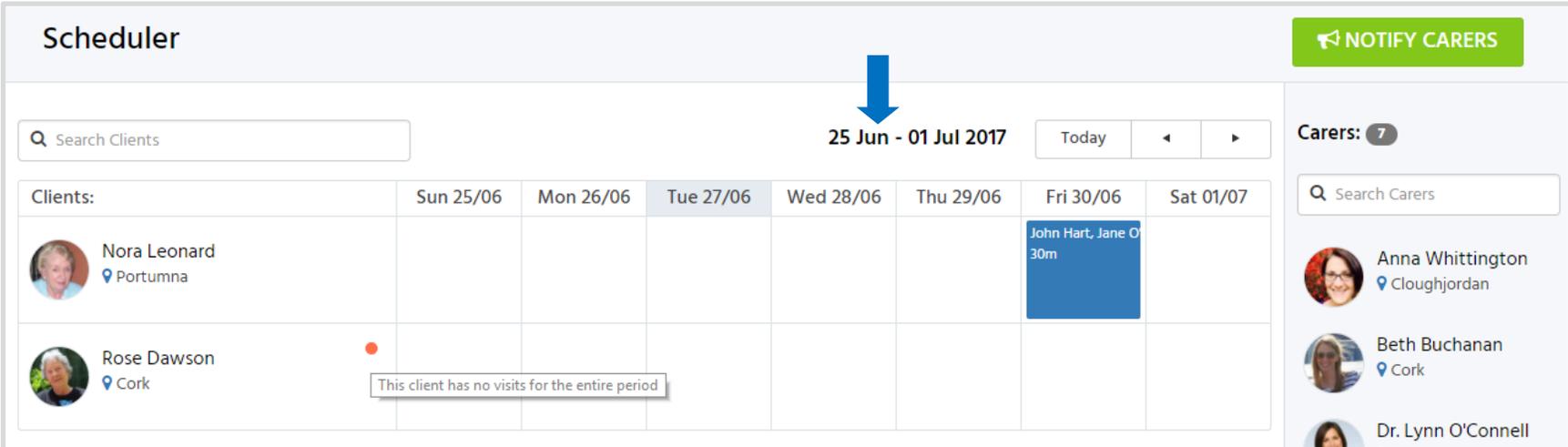
Using the Scheduler

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.



The screenshot shows the 'Scheduler' interface. At the top, there is a search bar for clients and a date selector for '25 Jun - 01 Jul 2017'. A blue arrow points to the date selector. Below this is a calendar grid with columns for each day of the week. Two clients are listed: Nora Leonard (Portumna) and Rose Dawson (Cork). A red dot next to Rose Dawson's name is highlighted with a tooltip that says 'This client has no visits for the entire period'. A blue arrow points to the search bar for clients. On the right side, there is a 'NOTIFY CARERS' button and a list of carers: Anna Whittington (Cloughjordan), Beth Buchanan (Cork), and Dr. Lynn O'Connell. A search bar for carers is also present.

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							

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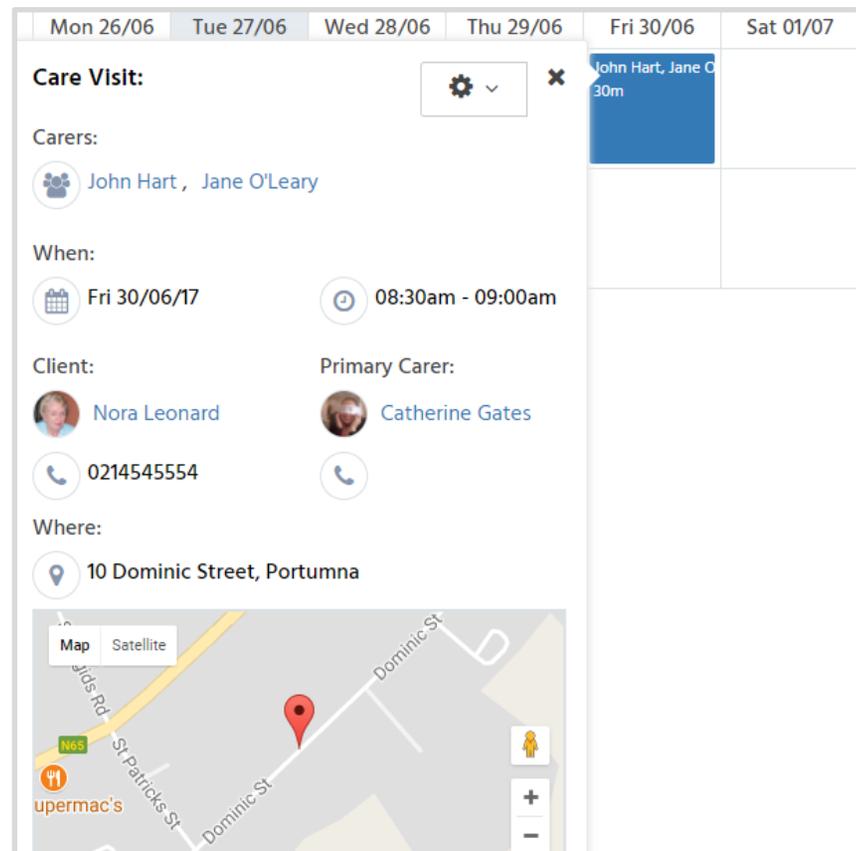
Using the Scheduler

View or Edit Scheduled Visits

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

- the scheduled **Carers**
- **Time and Date** of the visit
- the **Client's name**
- the **Primary Carer's name**
- **Contact** details
- **Address** and map location of the Client

To **Edit the details of the Care Visit**, click on the dropdown menu next to this icon and select **Edit**. Adjust the times, dates, or reassign the visit to a different Carer.



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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 shows the Care Scheduler 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 table with columns for days of the week and rows for clients. A blue arrow points to the 'Clients' column. The client list includes Nora Leonard (Portumna) and Rose Dawson (Cork). The calendar shows a visit for Anna Whittington (Cloughjordan) on Tue 27/06 and John Hart, Jane O (30m) on Fri 30/06. On the right, there is a search box for carers and a list of carers including Anna Whittington (Cloughjordan) and Beth Buchanan (Cork). A dashed blue arrow indicates the drag-and-drop action from the carer list to the calendar.

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	●						

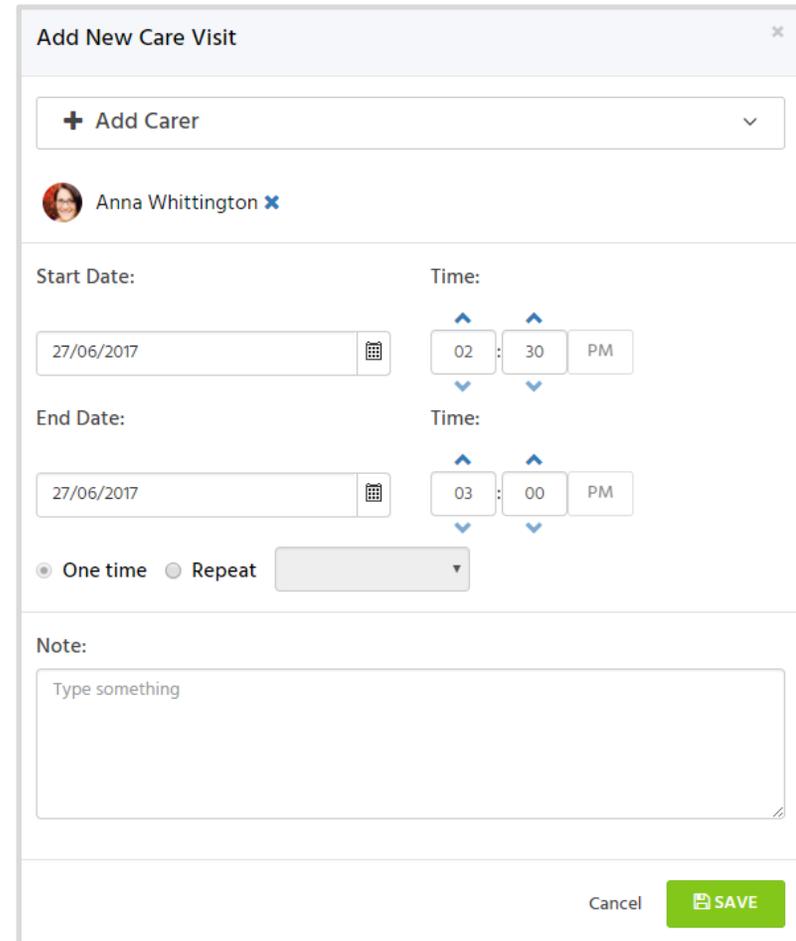
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Using the Scheduler

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.



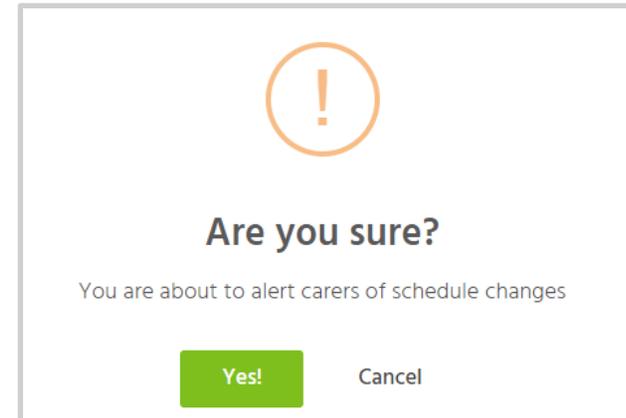
The screenshot shows a web form titled "Add New Care Visit". At the top, there is a dropdown menu labeled "+ Add Carer" with a downward arrow. Below this, a carer named "Anna Whittington" is listed with a small profile picture and a red 'X' icon to her right. The form then asks for "Start Date:" and "Time:". The start date is "27/06/2017" with a calendar icon. The start time is "02 : 30 PM", with up and down arrows for each field. Below that, it asks for "End Date:" and "Time:". The end date is "27/06/2017" with a calendar icon. The end time is "03 : 00 PM", with up and down arrows for each field. There are two radio buttons: "One time" (which is selected) and "Repeat". To the right of the "Repeat" button is a dropdown menu. At the bottom of the form is a "Note:" section with a text area containing the placeholder "Type something". At the very bottom right, there are two buttons: "Cancel" and a green "SAVE" button with a floppy disk icon.

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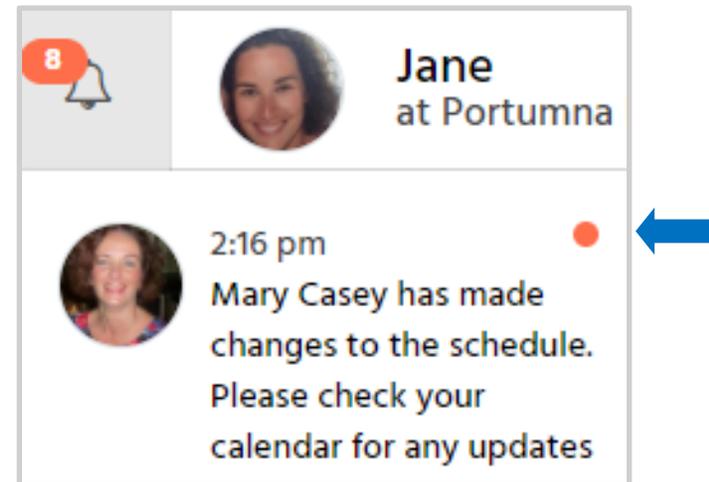
Using the Scheduler

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.



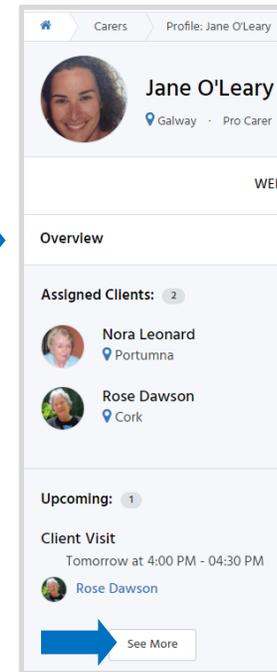
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View from the Carer's Perspective



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**.