

## VT Helplink Appointment Board User Guide

Within the VT Helplink Provider Portal the Appointment Board is where all intake appointments are created and managed.

### Getting Started

#### **Users & Permissions**

There are two different level permissions for the appointment board. One level is as a Program Administrator or Program Manager. The second level is as a Clinician.


**Program Administrator/Program Manager level (Manage All Schedules/Appointment Board):** For those with admin level permissions the user will have the ability to manage and schedule all appointments for all clinicians for each program they are associated with.

**Clinician level (Manage Own Schedule/Appointments):** A Clinician can be given the ability to manage their appointments/schedule. Clinicians with this permission level can only manage their own calendar. Users added with this permission will automatically be listed as Clinicians under the indicate programs. It is recommended that a Program Administrator/Program Manager add all Clinicians to appropriate programs.




*Please note: the two permission types described here are mutually exclusive. A single user cannot have access to managing all schedules/appointments and only their own schedule.*

### Appointments

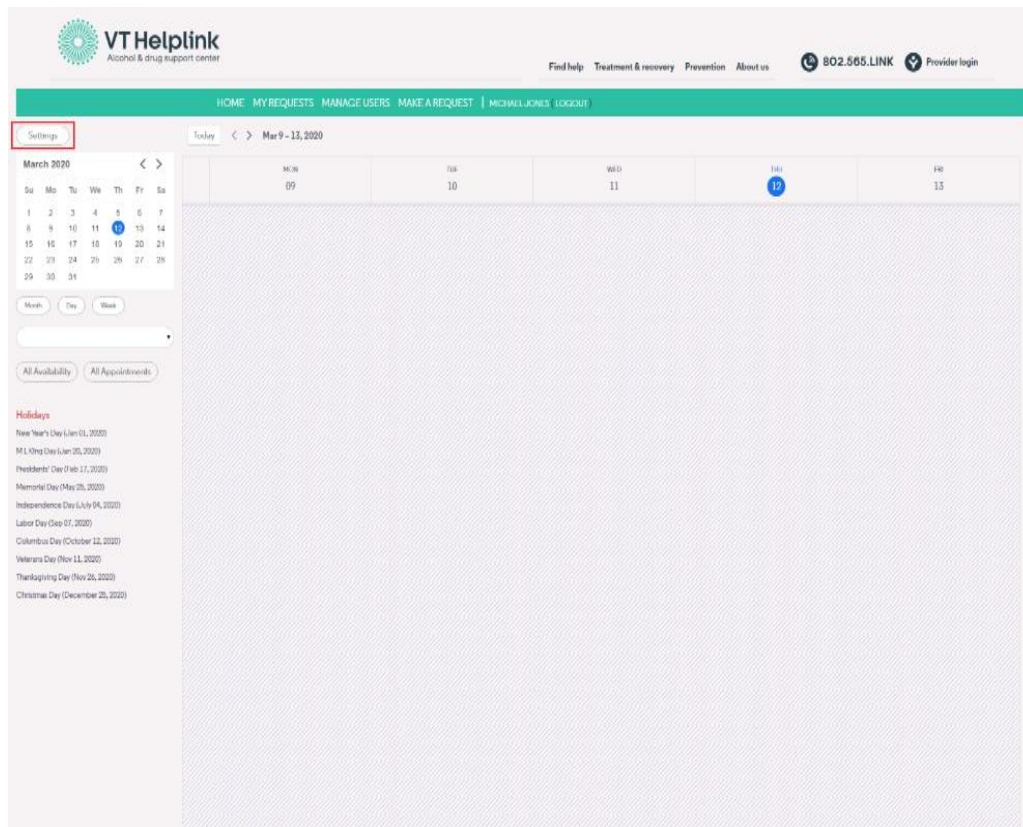
To open and view your appointment board, click on the **Appointment Board icon** found on the Provider Portal home page. This will open the board for the program selected.

 PROGRAMS ASSOCIATED WITH YOUR ACCOUNT

Click on a program name to view and edit details.

PROGRAM	CAPMAN TYPE	WAITING	APPOINTMENT BOARD	STATUS
Apple Test Program 24 upper plain vergennes VT 05491	Residential CMS	14	Not Available	 APPROVED
Health Care Test Program 204 upper lane vergennes VT 05491	Residential CMS	2		 APPROVED

Once you click on the Appointment Board the following screen will open (image below).



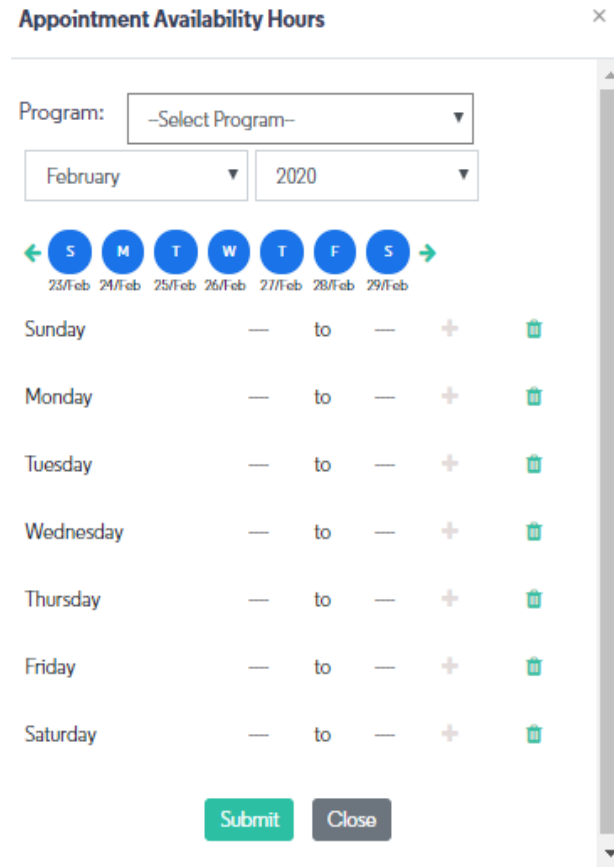
### Creating a Schedule

- To start adding appointments to your board, a schedule for a clinician will need to be added.
- To add a schedule to the calendar, select the **Settings icon** (image below) found at the top left-hand side of the screen.



- For those with **Admin level permissions**, a schedule for each clinician's calendar that you manage will need to be added.
- For **clinicians that will ONLY be managing their own calendar**, only your own schedule will need to be added.

Clicking on the **Settings icon** will open the schedule setter where you are able to create a weekly schedule for either yourself (if you are a clinician managing your own calendar) or for any Clinician in your program (if you have Admin level permission).



**Appointment Availability Hours**

Program:

February

23/Feb 24/Feb 25/Feb 26/Feb 27/Feb 28/Feb 29/Feb

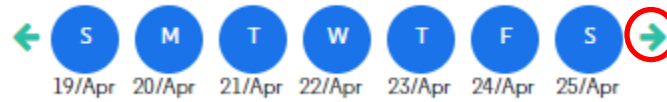
Sunday	—	to	—	+	
Monday	—	to	—	+	
Tuesday	—	to	—	+	
Wednesday	—	to	—	+	
Thursday	—	to	—	+	
Friday	—	to	—	+	
Saturday	—	to	—	+	

- To create a schedule for any one Clinician, select the appropriate program and Clinician from the drop-down menus. Only Clinicians associated with the program selected will be available under the Clinician drop-down.

Program:

Clinician:

- Select the appropriate week to add that week’s availability for appointments. Use the arrow buttons to advance to the following week.



- Select a day and enter a time from the drop-down menu. Selecting the plus sign will allow users to accommodate for a break in the middle of a shift. Use the trash can icon to delete a time, if needed.

Sunday	—	to	—	<b>+</b>	
Monday	—		—	+	
Tuesday	7:00 am		—	+	
Wednesday	7:30 am		—	+	
Thursday	8:00 am		—	+	
Friday	08:00 am	to	02:00 pm	+	
			04:00 pm		
Saturday	07:30 am	to	12:00 pm	+	

Selecting the days of the week (outlined in red) will deselect that day and remove it from the list of days available to add a schedule to.

Program:

Clinician:

Month:  Year:

←        → Copy to Next Week

22/Mar 23/Mar 24/Mar 25/Mar 26/Mar 27/Mar 28/Mar

Sunday	----	to	----	+	🗑️
Monday	----	to	----	+	🗑️
Thursday	----	to	----	+	🗑️
Friday	----	to	----	+	🗑️
Saturday	----	to	----	+	🗑️

- Select **Submit** to save the schedule created.

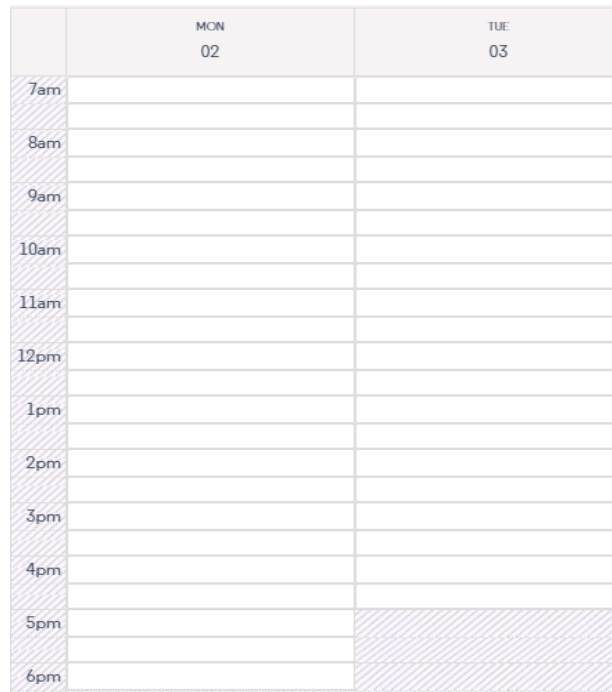
Month:  Year:

←        → Copy to Next Week

23/Feb 24/Feb 25/Feb 26/Feb 27/Feb 28/Feb 29/Feb

*\*Schedules can only be made on a week to week basis, but weekly schedules can be copied onto the following week(s) when "Copy to Next Week" is selected.*

After a schedule is successfully added into the system, the calendar will display a white space during the times and days entered indicating an open time block on the calendar for the Clinician.



	MON 02	TUE 03
7am		
8am		
9am		
10am		
11am		
12pm		
1pm		
2pm		
3pm		
4pm		
5pm		
6pm		

Grayed out areas indicate that that time is not within the clinician's schedule.

### **Editing Schedules**

**For Program Administrators/Managers**, they will have the ability to edit and delete all schedules and appointments.

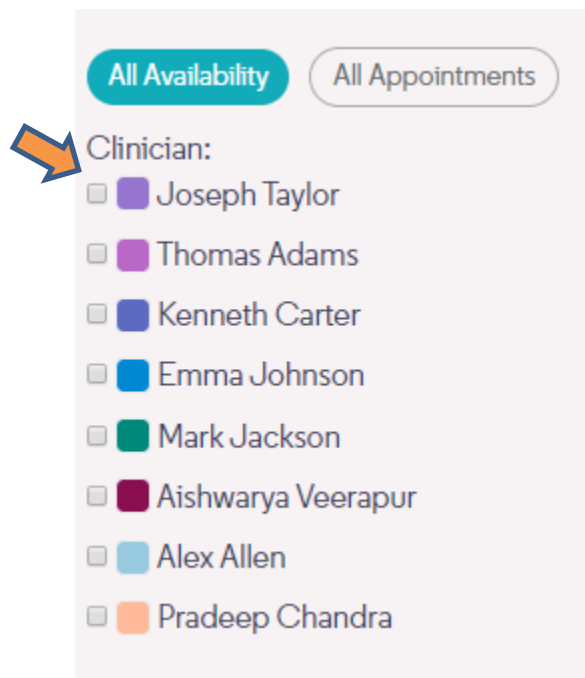
- If a user with admin/manager level permissions needs to delete an existing available time slot with appointments scheduled within that slot for a clinician, an error message will display with the message "You have appointments scheduled during this time. Please delete those appointments from your calendar before changing your working schedule."
- If another time slot for a specific day needs to be added, then they will need to enter a valid time slot.
  - For example, if the appointment time slot on Wednesday is scheduled from 7am-4pm and the admin tries to add another time slot on the same day between 9am-5pm then an error message will display with the message the "Schedule is already available."

### For Clinicians that are only managing their own calendar:

- If a Clinician attempts to delete an existing available time slot with appointments scheduled within that slot, an error message will display with the message "You have appointments scheduled during this time. Please delete those appointments from your calendar before changing your working schedule."
- If a Clinician needs to add another time slot on a specific day then they will need to enter a valid time slot.
  - For example, if the appointment time slot on Wednesday is scheduled from 7am-4pm and the admin tries to add another time slot on the same day between 9am-5pm then an error message will display with the message the "Schedule is already available."

### Scheduling an Appointment

- Select a Clinician from the menu of available Clinicians on the left-hand side of the screen. Use the gray checkbox to the left of any clinician's name to select a name.



- Click on any empty space within an available time block on the calendar, the **Create an Appointment page** will appear. This will allow you to enter in a new appointment during the selected time slot.

Appointments default to the duration selected under the *Intake Appointment Length* dropdown saved for your program. You can edit the duration of an intake/assessment appointment by changing the length of time selected under the dropdown (pictured below).

Length of the Assessment Appointment :\*

00:45 min

This dropdown is found under the **Edit Details** button within the **Program Info** field within the homepage of the specific program.

**PROGRAM INFO**

**Name:** Health Care Test Program

**Mailing Address:** 204 upper lane, vergennes, VT 05491

**Phone Number:** (122) 222-2333

**Website:**

[Edit Details](#)

[Delete this program](#) | [Clone this program](#)

Alternatively, you can bypass the default length of an appointment by manually by clicking within the time box and changing the start or end time of any one appointment.

Create an Appointment

Date:  
2020-03-02

Time:  
08:30 AM - 09:45 AM



Clinician:\*  
Thomas Adams

Program:\*  
Test Program

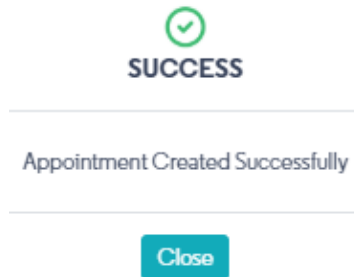
Client Contact Information

First Name:*	Middle Name:	Last Name:*	Phone Number:*
First name	Middle name	Last name	Phone number
Alternate Phone Number:	Email Address:	Notes:	Client consents to receive text message : <input type="checkbox"/>
Alternate phone number	Email Address		

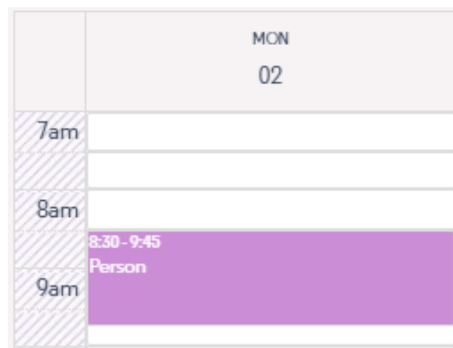
[Submit](#) [Reset](#)



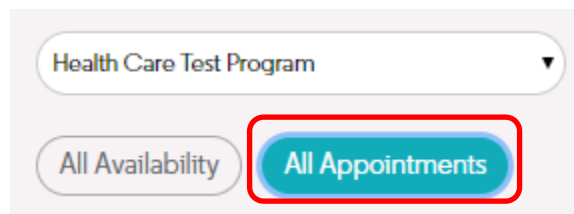
- Enter all information and select **Submit** to save changes and add the appointment to the selected clinicians calendar. The confirmation message below will appear.



- You will see the appointment added to the calendar and will be color coded to match the corresponding Clinician.



Selecting the **All Appointments** button will display all scheduled appointments for the clinician selected.



### Editing an Appointment

Click on any appointment on the calendar to edit the appointment.

- Select the **pencil icon** to make changes. All fields will become editable. Click into fields to make any necessary changes.
- Select **Update** to save changes.

#### Client Contact Information ×

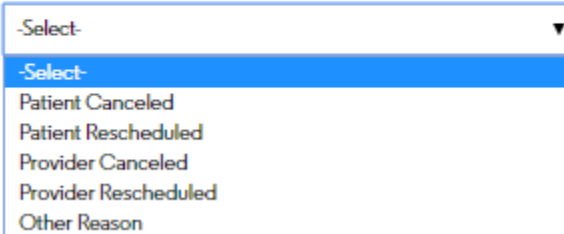
Customer Name:	TEST PERSON
Appointment Date:	2020-03-02
Appointment Time:	08:30 AM - 09:45 AM
Phone Number:	(999) 999-9991
Email Address:	Enter Email Address
Notes:	
Clinician:	Thomas Adams
Client consents to receive text message:	No ▼



### Deleting an Appointment

- Select the trash can icon to delete an appointment
- Select a reason from the drop-down menu.

#### Appointment Delete Confirmation ×

Reason: 

- Select-
- Select-
- Patient Canceled
- Patient Rescheduled
- Provider Canceled
- Provider Rescheduled
- Other Reason

- Select **Submit** to save changes.



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