CEDARON CONNECT

Scheduler Training Guide

Prerequisites

Required

1. Connect General Overview Training complete

Scheduler Training Learning Objectives

1. Understand Connect Scheduler navigation
    a. Views
        i. Monthly, Weekly, Daily
        ii. All therapists, individual therapists
        iii. By therapist or by resource
        iv. Show hidden appointments
        v. Modifying columns
    b. Scheduler Menu
2. Learn how to schedule appointments
    a. Drag and drop
    b. Double click on schedule
    c. Find next time slot
    d. Patient and Therapist Dashboard
3. Learn how to customize Scheduler
    a. Resources
    b. Block Types
    c. Scheduler Setup
        i. Shift Schedules
        ii. Block Times
        iii. Special Activities
        iv. Scheduler Settings
4. Understand appointment actions
5. Become acquainted with with Scheduler Reports
6. Understand Scheduler System Settings

Homework

1. Review and edit Scheduler Settings as necessary

   Scheduler → Utilities (Scheduler menu) → Scheduler Setup → Scheduler Settings

   Set this for each user; consider walking users through selecting their own settings during end-user training.

2. Set up therapist shift schedules for each facility

Scheduler → Utilities (Scheduler menu) → Scheduler Setup → Shift Schedule

Set this once for each Therapist at each facility

3. Set up block types

   Scheduler → Utilities (Scheduler menu) → Modify Block Types

   Set this once for your entire organization

4. Set up therapist block times for each facility

   Scheduler → Utilities (Scheduler menu) → Scheduler Setup → Block Times

   Set this once for each Therapist at each facility

5. Set up special activities

   Scheduler → Utilities (Scheduler menu) →Scheduler Setup → Special Activities

   a. Set up labels by selecting Customize in the middle of the special Activities window.
   b. Create any known special activities (holidays, scheduled lunch hours, staff meetings, etc.) for each therapist or group of therapists, as applicable.

   Set this once for each facility, and each therapist or group of therapists, as appropriate

6. Create a list of resources for each facility

   Scheduler → Utilities (Scheduler menu) → Add/Modify Resources

7. Create list of appointment Labels

   Create an appointment and select "Customize" next to the Label field on the appointment window

   Create one list for your organization

8. Create Patient Cancel Reason List

   Utilities (main menu bar) → Customizable Lists → Select Patient Cancel Reason → Click Add, and type Reason → Repeat for each Patient Cancel Reason

9. Create Clinic Cancel Reason List

   Utilities (main menu bar) → Customizable Lists → Select Clinic Cancel Reason → Click Add, and type Reason → Repeat for each Clinic Cancel Reason

10. Become familiar with Scheduler

a. Scheduling appointments
b. Arriving patients
c. Canceling appointments
    i. Patient Cancel
    ii. Clinic Cancel
d. Running reports