# Scheduling Module

CentralReach's Guide on How to Schedule
Client Appointments

Introduction

CentralReach is a scheduling centric system. The (📅) **Scheduling** module allows you to streamline your organization's and employees' appointment booking processes, while optimizing your administrative workflows. Scheduling is connected to other modules and product features in such a way that appointments are linked to client authorizations with the corresponding service codes, which are preconfigured with fee schedules, client and provider rates, and service notes requirements (amongst others) designed to simplify and optimize timesheet conversion processes. CentralReach can generate billing entries that contain all the required information for you to effectively manage billing, claim and payroll processes, and it all starts with scheduling and the information included and linked to appointments.

This guide provides you a quick overview and recommended workflows to book your clients' appointments and help you streamline your scheduling processes, so you can effectively manage schedules, billing, claims and payroll in CentralReach.

Please note that while there are other ways to schedule a client appointment, this tested method will enable you to streamline billing, claims, and payroll.

Claims		Payroll
Billing	(📅) **Scheduling Module**	
Clinical		Authorizations
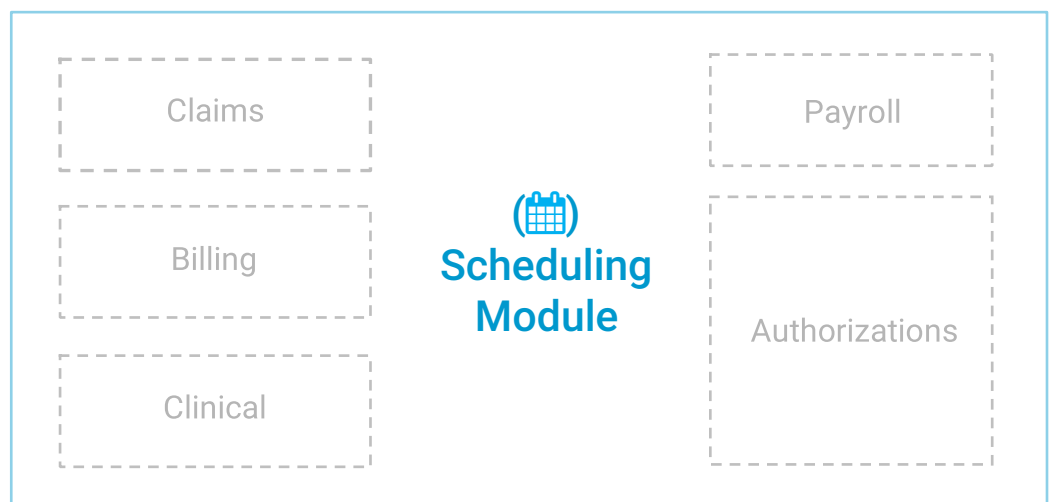
Getting Started

Let's face it, scheduling an appointment is easy. You can enter a date, time, provider and client name and book everyone's calendar to start providing services. But what about the client authorization and approved service codes? Is the payor going to pay for the services rendered on a specific date? Are you double booking providers? Can the provider view the client's contact details? How much is the provider going to be paid and how much is the client going to be billed?

CentralReach provides tools to manage, verify, track and audit your appointments and employees' schedules allowing information to flow in and out of the (📅) **Scheduling** module and saving you time that would otherwise be spent rescheduling appointments and struggling to get paid for service not yet approved, just to name two of many other hurdles.

Here's a quick overview of everything you should (or MUST) configure in CentralReach before you start scheduling client appointments:

1. **Contact Creation:** create employee contact, assign contact labels based on geographical location or providers credentials (RBT, BCBA, etc.), assign pay codes, pay rates, service codes, claim settings, add contact information and provide employee credentials to log in to CentralReach.

2. **Permissions:** the organization account must provide employees who are responsible for scheduling appointments the proper permission rights to allow them to access the (📅) **Scheduling** module. Permissions can be enabled via the (🔒) **Permissions** module.

3. **Contact Connections**: clients and employees must be connected to each other so that they can view and access each other's information, otherwise, such information will be withheld on the appointment. Connections can be established via **Utilities & Tools** in the (👥) **Contacts** module.

4. **Employee Scheduling Permissions**: if the employee is managing the calendar and scheduling appointments for other employees, he/she must have permission to manage such calendars. These permissions can be established via **Settings** in the (📅) **Scheduling** module.

5. **Service Codes:** billable, non-billable, payable and non-payable service codes need to be created in the (**$) Billing** module so you are able to bill payors and pay employees for the services as soon as they are rendered and the appointment is converted to a timesheet. Service codes can also be linked to any required service notes, which would be completed at the point of appointment conversion.

6. **Authorizations**: client authorizations must be added via the (💼) **Files** module, including the services approved by the client's payor and the respective start and end date, service codes, frequencies and amounts. Authorizations are linked to clients' appointments so that once an appointment is converted to a timesheet, a billing entry is created for billing, claim and payroll processing.

7. **Availability**: setting up your employees and clients availability will allow you to match contacts to find open time slots and easily schedule appointments. Availability can be added via the **Profile** in the (🎨) **Dashboard** module. Please note that clients can manage their own availability via the Client Portal, and employees can manage their own availability if they have the permission to manage availability enabled via the (🔒) **Permissions** module.

8. **Appointment Types**: appointment types allow you to standardize appointment titles and their length, helping you streamline the appointment scheduling process by automatically defaulting the appointment start and end time. Appointment Types can be added via the organization's account **Profile** in the (🎨) **Dashboard** module.

9. **Additional Settings:** defining appointments Additional Settings will allow you to do additional checks and balances while appointments are booked and converted. **Additional Settings** include checking for valid authorization dates when booking the appointment, validating appointment length and frequencies scheduled, adding standard cancellation reasons to be used when appointments are cancelled, ensuring appointments are converted before a lock date for timely

payroll processing, amongst others. **Additional Settings** can be configured via **Settings** in the **(📅) Scheduling** module.

Workflow Graphs

Contact Creation ● Create Contact in CentralReach

Permissions ● Enable Employees Scheduling Module Permissions

Connection ● Establish Employees & Clients Connections

Schedule Permission ● Enable Employee Calendar Permissions

Service Codes ● Payor Fee Schedules, Provider & Client Rates, Session Notes

Authorizations ● Client Payor Service Codes, Frequencies & Amounts

Availability ● Setup Your Provider & Client Availability

Appointment ● Standardize Appointment Types & Appointment Length

Settings ● Establish Standard Cancellation Reasons, Enable Schedule Reasons & More

Schedule Client Appointments

Once all settings defined above are configured, CentralReach recommends you book appointments for clients via the calendar view accessible through **View My Calendar** in the (📅) **Scheduling** module.

View My Calendar allows you to easily book appointments for yourself or for your organization's employees. You can search and add other employees, clients or contacts to the calendar view to quickly identify available times and days when a new appointment can be scheduled, and you can book appointments by clicking the date and time slots within the calendar view or clicking the top **+ New Event** button. A variety of views by day, week, month and more are also available for you to easily navigate and view contacts schedules.

The following list provides you general guidelines and recommendations on the information you should have available when scheduling a client appointment, in order to streamline the booking process:

- **Contact Labels**: it is recommended to assign contact labels to employees based on their geographical location (Miami, FL) and their credentials (BCBA, RBT, etc.) or expertise, to be able to easily search and add contact group labels of employees to the calendar view, versus having to add each employee one by one. This would help expedite your employee search process when booking appointments and will also help you quickly match employees and clients' calendars.

- **Authorizations:** ensure you know ahead of time the following details pertaining the client's authorization:
  - Services approved: this will ensure you select the proper Appointment Type and assign the defined appointment label to easily filter the appointment after it has been created
  - Start and end date: to match the appointment start and end date to the authorization start and end date, and be able to measure authorization utilization rates appropriately
  - Frequencies & amounts: to match the appointment length and the recurring series based on the approved frequencies & amounts, and avoid billing and claim issues after services are rendered

  If **Schedule Validation** is enabled, discrepancy warnings between the authorization and the appointment will be shown during the appointment creation process. Additionally, there are two

Scheduling permissions, (1) Appointments > Schedule Overlapping Appointments and (2) Appointments > Override Authorization Limitations in the (🔒) **Permissions** module that work in conjunction with Schedule Validation so in addition to the warnings you completely block users from double-booking providers, and from booking services exceeding the client's authorization limits. These permissions will prevent the appointments from being scheduled whenever these discrepancies occur. If **Schedule Validation** is not enabled, errors that could have been avoided will be shown during the appointment conversion process which happens after services are rendered. As a result, you may encounter billing, payroll and claim issues for services provided that the client's payor has not approved and may not pay for.

- **Book a consecutive appointment series for the client and the employee without an authorization**: this will allow you to maintain the employee booked and unavailable, so he/she can continue to provide services to the client past the existing appointment and authorization period. There are auditing filters available in **View as Grid** that will allow you to filter these appointments and link them to an authorization once the authorization for the corresponding time period is approved.

Manage Appointments

[View My Calendar](#) allows you to select and customize your calendar and appointments view by day, week, month, list or planner, and is the recommended view to be used by employees to see their appointment schedule or to manage the organization's calendar.

View My Calendar Features

- You can click and open appointments from any of the available views to review appointment details, edit the appointment information, delete, cancel or convert the appointment
- The **Day View** and the **Week View** allow you to quickly view your schedule or other employees' schedules, and appointments can be [dragged and dropped](#) to other times of the day or week to be rescheduled
- The **Day View** and the **Week View** identify billable appointments with a white lightning bolt (⚡) icon that can be clicked to be redirected to convert the appointment to a timesheet. Converted appointments are identified with a green lightning bolt (⚡) icon.
- Appointments hidden from the client's view in the Client Portal are identified by a strikethrough eye (👁) icon.
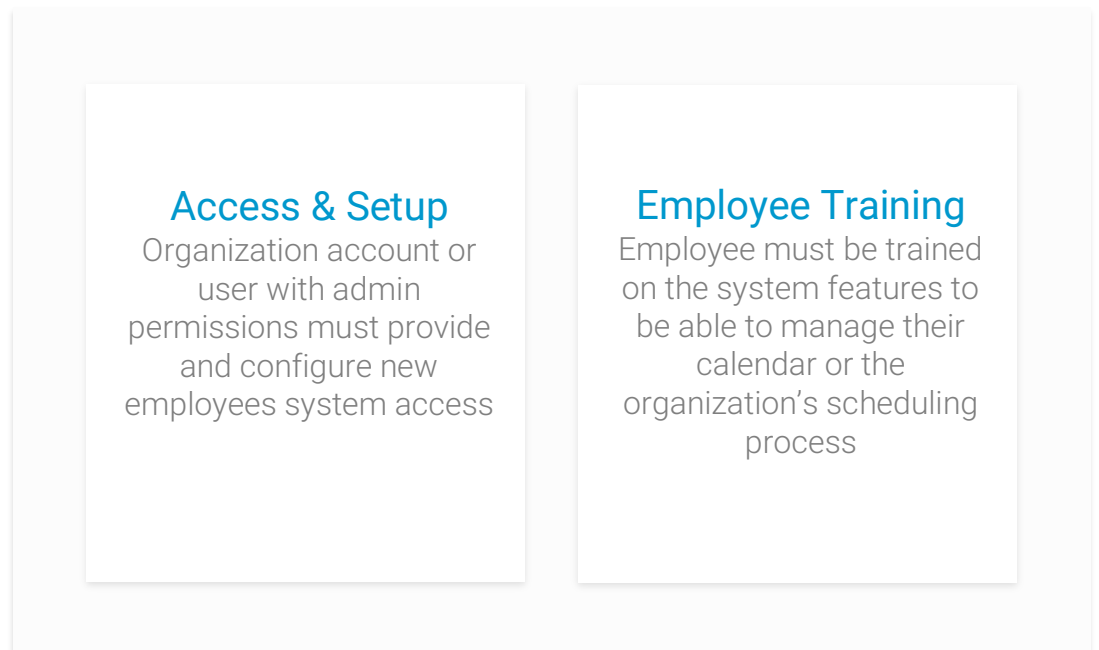
Resources

There are a variety of help materials available to help you learn more about the (📅) **Scheduling** module appointment booking processes, as well as to review step-by-step user guides and video tutorials to understand where to go and how to navigate all the scheduling features:

- [Knowledge base articles](#)
- [User Guides](#)
- [Videos & Pre-recorded Webinars](#)
- [Training Course](#)

Additionally, the following checklists provide an overview of tasks to be completed for new employees before they can either schedule an appointment or be booked for an appointment. Tasks have been defined based on employees' roles and responsibilities as it relates to scheduling

and servicing clients, and one checklist includes tasks pertaining **Access & Set Up**, while the other one includes tasks related to **Employee Training**.

Access & Setup
Organization account or user with admin permissions must provide and configure new employees system access

Employee Training
Employee must be trained on the system features to be able to manage their calendar or the organization's scheduling process

Roles

- **Scheduler**: an employee responsible for managing other employees' calendars and bookings of clients' appointments, or employees managing their own appointment scheduling processes.
- **Provider**: an employee responsible for providing services based on the appointments scheduled by the scheduler.

Access & Set Up Checklist

No.	Task	Details	Employee Role	Status
1	Contact Creation	Employee contact creation: CR login, pay codes, pay types, contact labels, service codes & claim settings	Scheduler & Provider	☐
2	Permissions	Provide employee all necessary permissions to the (📅) **Scheduling** module	Scheduler & Provider	☐
3	Contact connections	Connect employee to the required providers, employees and clients	Scheduler & Provider	☐
4	Employee Calendar Permissions	Provide employee access to manage all other employees' calendars and appointment schedules, if scheduling appointments for other employees	Scheduler	☐
5	Sync Appointment Types	Provide employee access to all the organization's appointment types, and details on what they should be used for	Scheduler	☐

Employee Training Checklist

No.	Task	Details	Employee Role	Status
1	Schedule Appointments	Learn how to create new appointments, match employee-client calendars and calendar views	Scheduler	☐
2	Availability	Learn on how to enter and manage client and provider availability	Scheduler Provider*	☐
3	Service Codes & Authorizations	Understanding of service codes and client authorizations to be used to book appointments, and how to manage authorization and overlapping errors	Scheduler	☐
4	Service Codes & Authorizations	Understanding of service codes and client authorizations they are booked to provide client services for	Provider	☐
4	Edit/Delete/Cancel	Understand how to edit, delete and cancel appointments using the established cancelation reasons.	Scheduler	☐
5	View Schedule & Appointment Details	Understand how to view their schedule via **View My Calendar** and access appointment details	Provider	☐

*If employees have permission to manage their own availability