

New Calendar Guide

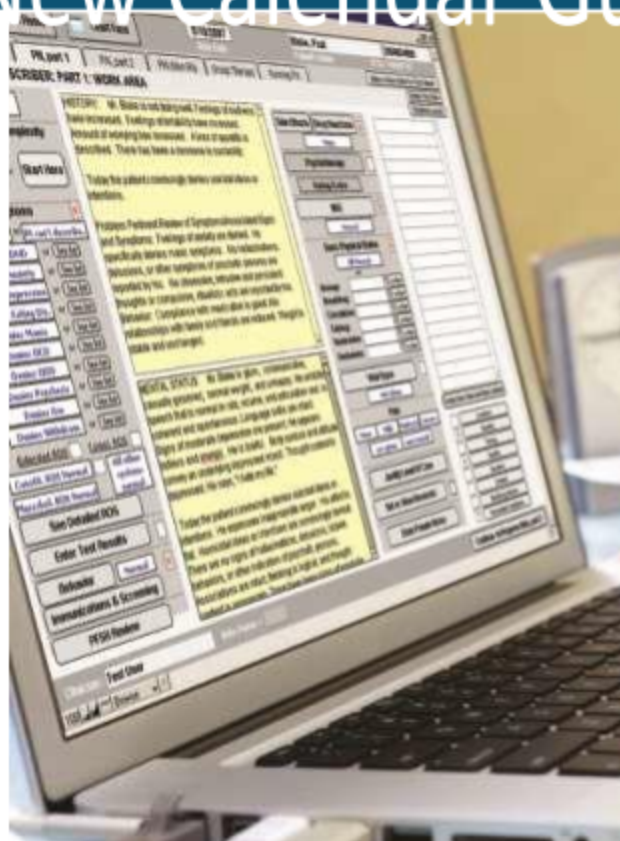


TABLE OF CONTENTS

Accessing The New Calendar	3
Configuring The New Calendar	4
From The Calendar	4
Select Group Options	5
Select My Options	6
Set Up Clinicians	7
Set Up Appointment Types	10
Open Legacy Calendar (From Calendar)	12
From Settings + Directories	12
Icons/Views	13
Scheduling An Appointment	19
Group Appointments	24
Dragging And Dropping Appointments	29
Printing An Appointment List	30
Exporting An Appointment List	32

ACCESSING THE NEW CALENDAR

Enter the New Calendar by clicking the Calendar drawer in the Chart Room.

Alternatively, you can access the New Calendar by clicking the 'Calendar' button from a patient's Chart Face (and other areas within the program).

The screenshot below shows what you will see upon entering the New Calendar (this shows the schedule view).

The screenshot displays the ICANotes New Calendar interface. The main area shows a schedule view for Monday, 8 Feb 2021. The calendar is organized by time slots (9:00, 10:00, 11:00, 12:00, 1:00, 2:00, 3:00, 4:00) and columns for different clinicians: Michelle Docs, Dr. Zepp, Jane, Kyle Lindsay, Anna, Emma, and West Coast Clinic. Appointments are represented by colored blocks with labels such as 'Shirley, Anne Initial Assessment (A) 1.00', 'King, Elle Chemical Dependency (X) 1.00', 'Group (2) Group (S) 1.00', 'Lunch Block Out (BO) 1.00', 'Blake, Anita Follow Up (S) 1.00', 'King, Elle Chemical Dependency (S) 1.00', and 'Test, Patient Vitals/Injection (S)'. On the left side, there is a 'Chart Room' section with a search bar and buttons for 'Account', 'Find Openings', 'Filter Appts', 'New Appt', 'Waitlist', 'Print Reports', and 'Export'. On the right side, there are three monthly calendars for January 2021, February 2021, and March 2021. The top navigation bar includes options like 'Sign Out', 'Edit', 'View', 'Format', 'Reports', 'Help', and a 'Today' button.

After you have set up the clinicians in your practice, each one will have their own column on the calendar, and you can use the filters (see below) to control your view.

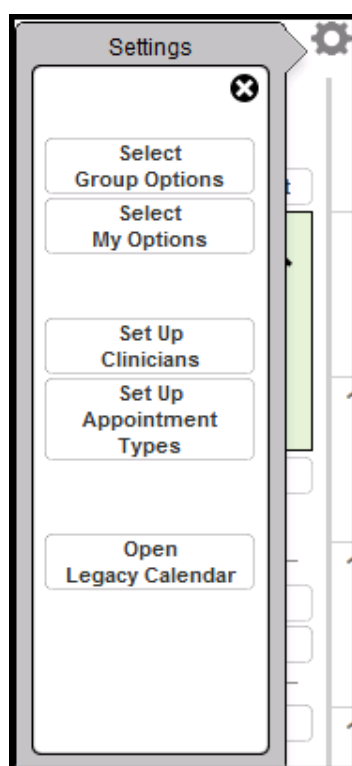
The screenshot shows the filter bar at the bottom of the ICANotes interface. It includes a 'group' dropdown menu with '[Show All]' selected, a 'clinician' dropdown menu, and a 'view' section with icons for different calendar views (list, calendar, grid, etc.). There is also a 'Today' button on the right.

CONFIGURING THE NEW CALENDAR

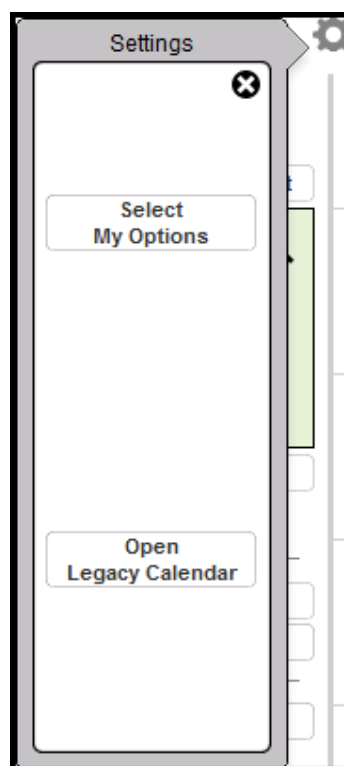
Settings and options can be found in the Calendar and in Settings & Directories.

FROM THE CALENDAR

Within the Calendar, use the Settings option icon in the top left.



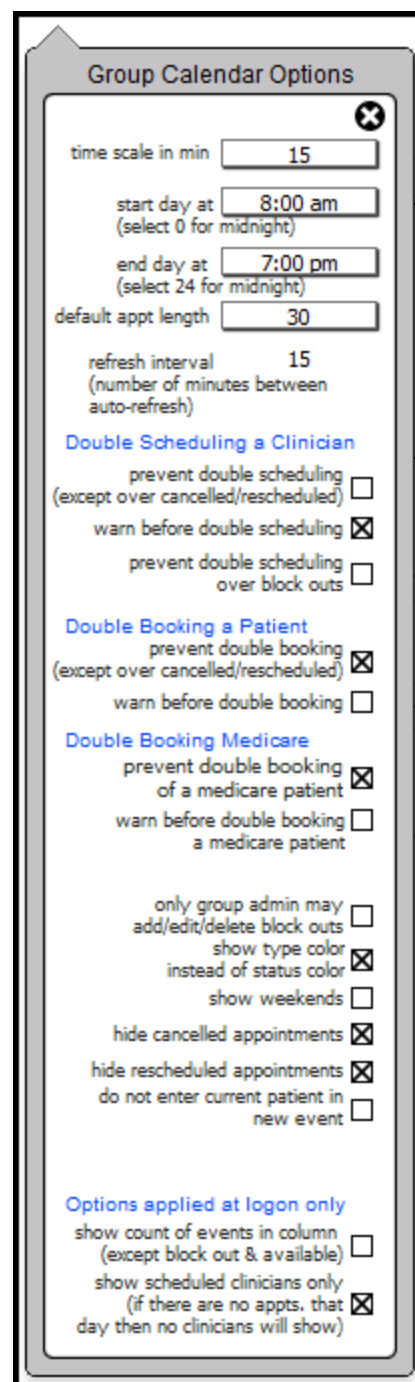
Group Admin View



Non-Group Admin View

SELECT GROUP OPTIONS - only Group Administrators have access to this button. Select Group Options allows you to set the following options for the entire group:

- time scale in min
- start day at
- end day at
- default apt length
- refresh interval
- prevent double scheduling
- warn before double scheduling
- prevent double scheduling over block outs
- prevent double booking
- warn before double booking
- prevent double booking of Medicare patient
- warn before double booking a Medicare patient
- only group admin may add/edit/delete block outs
- show type color instead of status color
- show weekends
- hide cancelled appointments
- hide rescheduled appointments
- do not enter current patient in new event
- show count of events in column
- show scheduled clinicians only



Group Calendar Options

time scale in min

start day at
(select 0 for midnight)

end day at
(select 24 for midnight)

default appt length

refresh interval
(number of minutes between auto-refresh)

Double Scheduling a Clinician

prevent double scheduling (except over cancelled/rescheduled) ☐

warn before double scheduling ☒

prevent double scheduling over block outs ☐

Double Booking a Patient

prevent double booking (except over cancelled/rescheduled) ☒

warn before double booking ☐

Double Booking Medicare

prevent double booking of a medicare patient ☒

warn before double booking a medicare patient ☐

only group admin may add/edit/delete block outs ☐

show type color instead of status color ☒

show weekends ☐

hide cancelled appointments ☒

hide rescheduled appointments ☒

do not enter current patient in new event ☐

Options applied at logon only

show count of events in column (except block out & available) ☐

show scheduled clinicians only (if there are no appts. that day then no clinicians will show) ☒

Group Calendar Options

SELECT MY OPTIONS - this option allows each user to set up a portion of the calendar to his/her specifications.

- time scale increments
- start day at
- end day at
- default appt length
- start on view
- refresh interval
- show weekends
- hide cancelled appointments
- hide rescheduled appointments
- do not enter current patient new event
- maximize calendar window

Individual Calendar Options [X]

time scale increments

start day at
(select 0 for midnight)

end day at
(select 24 for midnight)

default appt length

start on view
(requires new logon)

refresh interval
(number of minutes between auto-refresh)

	On	Off
show weekends	<input type="radio"/>	<input checked="" type="radio"/>
hide cancelled appointments	<input type="radio"/>	<input checked="" type="radio"/>
hide rescheduled appointments	<input type="radio"/>	<input checked="" type="radio"/>
do not enter current patient in new event	<input type="radio"/>	<input checked="" type="radio"/>

maximize calendar window ☐

Individual Calendar Options

SET UP CLINICIANS - Group Administrators can add a clinician to the calendar for scheduling.

Clinician Settings

Calendar Group
[Show All]

+ Add a Clinician Edit Order

1)	Kyle Lindsay (Kyle Lindsay)			
2)	Michelle Docs (Michelle Docs)			
3)	Anna - Hospital (Anna Recksick, MD)			
4)	Dr. Zepp (Joy Zepp, MD, PsyD)			
5)	Anna (Anna Recksick, MD)			
6)	Jane (Jane Moody, LMFT)			
7)	Jane - Hospital (Jane Moody, LMFT)			
8)	Emma (Emma Royds, RN)			
9)	West Coast Clinic (Crystal Docs)			

Clinician Settings

Clinician Settings

Name Displayed in Calendar
[Text Field]

Connect to this Clinician
(Required for Clinician using Clinical Reminder Sheet or Quick Calendar)
[Text Field] X

[Show All]

Assign Clinician to Group
 << Select Group >>
 add new group

Remove Clinician from Group
 << Select Group >>

Cancel
 Save
 Delete

Add a Clinician popup window

Users are not automatically assigned to the Calendar. To add them, group administrators should follow these instructions:

1. Click on the Settings icon.
2. Click on 'Set Up Clinicians'
3. Click on 'Add Clinician'
4. In the popup window, fill in the required fields:

- A. Name displayed should reflect the name of the location (if multiple locations). *Note: It is best NOT to add credentials because this can change and this may cause issues changing the name in the future.*
- B. Click on the 'Connect to this Clinician' field to populate a list to select the provider.
- C. (Optional) Click the 'Add New Group' button to create the location as a group.
- D. In the popup window, type in the name of the location.
- E. Click the button to finish creation of the new group.
- F. Click the 'Save' button to save the new "name" on the calendar.

The image shows a 'Clinician Settings' form and a 'Create New Group' popup window. The form has a title bar with a gear icon. Below the title bar is a section titled 'Name Displayed in Calendar' with a text input field labeled 'A'. Below this is a section titled 'Connect to this Clinician' with a text input field labeled 'B' and a red 'X' icon. Below this is a section titled '[Show All]' with a list box. Below the list box is a section titled 'Assign Clinician to Group' with a button labeled '<< Select Group >>' and a button labeled 'add new group' labeled 'C'. Below this is a section titled 'Remove Clinician from Group' with a button labeled '<< Select Group >>'. At the bottom of the form are three buttons: 'Cancel' labeled 'F', 'Save', and 'Delete'. The 'Create New Group' popup window has a title bar. Below the title bar is a text input field labeled 'Enter the new group name.' and a section titled 'New Group Name' with a text input field labeled 'D'. At the bottom of the popup are two buttons: 'Cancel' and 'OK' labeled 'E'.

Continue following the steps above until all providers are added to the calendar and assigned to groups if desired..

Clinician Settings

Calendar Group
[Show All]

[+ Add a Clinician](#)

		Edit	Order
1)	Kyle Lindsay (Kyle Lindsay)	[icon]	[icon]
2)	Michelle Docs (Michelle Docs)	[icon]	[icon]
3)	Anna - Hospital (Anna Recksick, MD)	[icon]	[icon]
4)	Dr. Zepp (Joy Zepp, MD, PsyD)	[icon]	[icon]
5)	Anna (Anna Recksick, MD)	[icon]	[icon]
6)	Jane (Jane Moody, LMFT)	[icon]	[icon]
7)	Jane - Hospital (Jane Moody, LMFT)	[icon]	[icon]
8)	Emma (Emma Royds, RN)	[icon]	[icon]
9)	West Coast Clinic (Crystal Docs)	[icon]	[icon]

When you are done adding the providers, arrange the calendar so that the name of the providers line up (optional) by using the arrow icons to move the name of the clinician up or down.

After setting up clinicians in the Calendar, the providers will be able to see their schedules from the Quick Calendar by clicking the 'Quick Calendar' button. If a provider does not want to see the block outs or cancelled/Rescheduled Appointments they have the option to check the box to hide those selections.

ICANotes
Behavioral Health EHR

Calendar **Close**

Filter by clinician >> [Appt. Status and Note can be edited here](#)
[Click Patient Name for Chart Details](#)

Show Appointments on ☐ Hide Block Outs ☐ Hide Cancelled/Rescheduled Note(s) Created by You for Patient on this Date **Print**

Status	Time	Patient Name	Appointment Type	Note	Chart	Appt
Attended	9:00 AM	Shirley, Anne		No Note	[icon]	[icon]
	2/8/2021 10:00 AM	Initial Assessment			[icon]	[icon]
Cancelled	10:00 AM	King, Elle			[icon]	[icon]
	2/8/2021 11:00 AM	Chemical			[icon]	[icon]
Scheduled	11:00 AM	Group Appt		Group Appt		[icon]
	2/8/2021 12:00 PM	Group				[icon]
Block Out	12:00 PM	Lunch			[icon]	[icon]
	2/8/2021 1:00 PM	Block Out			[icon]	[icon]
Scheduled	1:00 PM	Test, Patient		No Note	[icon]	[icon]
	2/8/2021 2:00 PM	Intake			[icon]	[icon]
Scheduled	2:00 PM	Blake, Anita		No Note	[icon]	[icon]
	2/8/2021 3:00 PM	Follow Up			[icon]	[icon]
Scheduled	3:00 PM	King, Elle		No Note	[icon]	[icon]
	2/8/2021 4:00 PM	Chemical			[icon]	[icon]

SET UP APPOINTMENT TYPES - you can customize appointment types (categories) specific to your practice.

The screenshot shows the 'Appointment Types' window. At the top, there is a button that says '+ Add an Appointment Type'. Below this is a table with the following columns: an index number, the appointment type name, the length, an 'Edit' checkbox, and a 'Default' checkbox. The table contains the following data:

		Length	Edit	Default
1)	Follow Up	1:00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2)	Vitals/Injection	0:15	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3)	Progress Note	0:45	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4)	Intake	1:00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5)	Initial Assessment		<input checked="" type="checkbox"/>	<input type="checkbox"/>
6)	Group	1:00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
7)	Consultation		<input checked="" type="checkbox"/>	<input type="checkbox"/>
8)	Chemical	1:00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
9)	Block Out	4:00	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Click on Add Appointment Type.

This screenshot is similar to the first one, but with a mouse cursor clicking on the '+ Add an Appointment Type' button. The table in this window contains the following data:

		Length	Edit	Default
1)	Vitals/Injection	0:15	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2)	Progress Note	0:45	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3)	Intake	1:00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4)	Initial Assessment		<input checked="" type="checkbox"/>	<input type="checkbox"/>
5)	Group	1:00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
6)	Follow Up	1:00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
7)	Consultation		<input checked="" type="checkbox"/>	<input type="checkbox"/>
8)	Chemical	1:00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
9)	Block Out	4:00	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Add Appointment Type Name, Default Length, and Type Color.
Once done, click the 'Save' button.
Your appointment type will be added to the list

You can edit an existing appointment type by clicking the pencil icon next to the appointment type in the list. Make the desired changes and click the 'Save' button.

Cancel can be used if you began to make changes and no longer wish to.
Delete an appointment type by clicking the 'Delete' button.

Once done, click the 'Save' button.
Your appointment type will be added to the list.

	Length	Edit	Default
1) Vitals/Injection	0:15		
2) Progress Note	0:45		
3) New Appointment	0:20		
4) Intake	1:00		
5) Initial Assessment			
6) Group	1:00		
7) Follow Up	1:00		
8) Consultation			
9) Chemical	1:00		
10) Block Out	4:00		

OPEN LEGACY CALENDAR (FROM CALENDAR) - click this button to open the Legacy Calendar with all data (appointments, settings, and options) intact. The Legacy Calendar will remain until you leave the Calendar; upon return, the New Calendar will open.

FROM SETTINGS + DIRECTORIES

Group and Individual options are also available in Settings & Directories.

Individuals:

- The options available can be selected from the Calendar Options tab. Group Settings are read only in this area.
- Users can choose if they want to use the Legacy Calendar from here by clicking the 'Use Legacy Calendar' button. If selected from here, the Legacy Calendar will open every time the calendar is opened until you log off.
- You can go back to using the New Calendar by clicking the 'Use New Calendar' button.

Return to Individual		Group Level Settings & Directories																																																	
members because you are a Group Administrator.																																																			
<div style="display: flex; justify-content: space-between; font-weight: bold; font-size: 0.9em;"> Personal Info Caseload Billing Rates & Payer Rules ICD-10 Codes Custom Buttons Reminders Device Restore Deleted </div>																																																			
Identity		Options																																																	
<p>For the rest of this session:</p> <div style="display: flex; margin-top: 10px;"> <div style="border: 1px solid black; padding: 5px; margin-right: 10px; text-align: center;"> Use Legacy Calendar </div> <div style="border: 1px solid black; padding: 5px; margin-right: 10px; text-align: center;"> Use New Calendar </div> </div>		<div style="background-color: #f0f0f0; padding: 10px; border: 1px solid #ccc;"> <p style="text-align: center; font-size: 0.8em; margin-bottom: 10px;"> Settings selected in this area will default for this staff / clinician. These individual options supersede group options. </p> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 40%;"></th> <th style="width: 15%; text-align: center; border-bottom: 1px solid black;">Individual</th> <th style="width: 15%; text-align: center; border-bottom: 1px solid black;">Group</th> <th style="width: 10%;"></th> <th style="width: 10%; text-align: center; border-bottom: 1px solid black;">Indiv. On Off</th> <th style="width: 10%; text-align: center; border-bottom: 1px solid black;">Group</th> </tr> </thead> <tbody> <tr> <td>time scale increments (in minutes)</td> <td style="text-align: center;"><input type="text" value="15"/></td> <td style="text-align: center;"><input type="text" value="15"/></td> <td></td> <td></td> <td></td> </tr> <tr> <td>start day at (select 0 for midnight)</td> <td style="text-align: center;"><input type="text" value="9:00 am"/></td> <td style="text-align: center;"><input type="text" value="8:00 am"/></td> <td>show weekends</td> <td style="text-align: center;"><input type="radio"/> <input checked="" type="radio"/></td> <td style="text-align: center;"><input type="checkbox"/></td> </tr> <tr> <td>end day at (select 24 for midnight)</td> <td style="text-align: center;"><input type="text" value="5:00 pm"/></td> <td style="text-align: center;"><input type="text" value="7:00 pm"/></td> <td>hide cancelled appointments</td> <td style="text-align: center;"><input type="radio"/> <input checked="" type="radio"/></td> <td style="text-align: center;"><input checked="" type="checkbox"/></td> </tr> <tr> <td>default appt duration (in minutes)</td> <td style="text-align: center;"><input type="text"/></td> <td style="text-align: center;"><input type="text" value="30"/></td> <td>hide rescheduled appointments</td> <td style="text-align: center;"><input type="radio"/> <input checked="" type="radio"/></td> <td style="text-align: center;"><input checked="" type="checkbox"/></td> </tr> <tr> <td>refresh interval (number of minutes between auto-refresh)</td> <td style="text-align: center;"><input type="text"/></td> <td style="text-align: center;"><input type="text" value="15"/></td> <td>do not enter current patient in new event</td> <td style="text-align: center;"><input type="radio"/> <input checked="" type="radio"/></td> <td style="text-align: center;"><input type="checkbox"/></td> </tr> <tr> <td>start on view</td> <td colspan="5" style="text-align: center;"><input type="text"/> (Requires New Logon)</td> </tr> <tr> <td></td> <td></td> <td></td> <td>maximize calendar window</td> <td colspan="2" style="text-align: center;"><input type="checkbox"/></td> </tr> </tbody> </table> </div>			Individual	Group		Indiv. On Off	Group	time scale increments (in minutes)	<input type="text" value="15"/>	<input type="text" value="15"/>				start day at (select 0 for midnight)	<input type="text" value="9:00 am"/>	<input type="text" value="8:00 am"/>	show weekends	<input type="radio"/> <input checked="" type="radio"/>	<input type="checkbox"/>	end day at (select 24 for midnight)	<input type="text" value="5:00 pm"/>	<input type="text" value="7:00 pm"/>	hide cancelled appointments	<input type="radio"/> <input checked="" type="radio"/>	<input checked="" type="checkbox"/>	default appt duration (in minutes)	<input type="text"/>	<input type="text" value="30"/>	hide rescheduled appointments	<input type="radio"/> <input checked="" type="radio"/>	<input checked="" type="checkbox"/>	refresh interval (number of minutes between auto-refresh)	<input type="text"/>	<input type="text" value="15"/>	do not enter current patient in new event	<input type="radio"/> <input checked="" type="radio"/>	<input type="checkbox"/>	start on view	<input type="text"/> (Requires New Logon)								maximize calendar window	<input type="checkbox"/>	
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Security Center

My Security Info

Change My Password

Fix My Clipboard

Please Note: Passwords must have 8 characters and at least one letter and one number. One of the letters must be capitalized. The password should not include the user name and should not be the same as the previous password.

Group Administrators:

- Select Settings that Individual Users can Override. While these settings can be overwritten by individual users, it is beneficial to have settings set up for them when they first go to the Calendar. (These settings are on the left.)
- Group Level Only Settings are set for the entire group.

Settings & Directories

Specific to Individual

Group Level Settings & Directories

Settings for Site Staff, Rules and MAR have been moved under the More tab

[Sites/Letterheads](#)
[Service/Mod Codes](#)
[Lab Req Protocols](#)
[Meds Protocols](#)
[Provider Directory](#)
[Insur Payers](#)
[Therapy Groups](#)
[Formats](#)
[MCM Auth.](#)
[Accounts](#)
[Calendar](#)
[Integrations](#)
[More](#)

Settings that Individual Users can Override

time scale increments (in minutes)

start day at (select 0 for midnight)

end day at (select 24 for midnight)

default appt duration (in minutes)

refresh interval (number of minutes between auto-refresh)

show weekends ☐

hide cancelled appointments ☒

hide rescheduled appointments ☒

do not enter current patient in new event ☐

note highlight ☒

The following Settings are only enforced after a new login.

show column count ☐

show scheduled clinicians only ☒

Group Level Only Settings

Double Scheduling = A clinician has more than one appointment scheduled in the same time slot

prevent double scheduling (except over canceled/rescheduled) ☐

warn before double scheduling ☒

prevent double scheduling over block outs ☐

only group admin may add/edit/delete block outs ☐

show type color instead of status color ☐

number of columns to display

Double Booking = A patient is scheduled with more than one clinician in the same time slot

prevent double booking (except over canceled/rescheduled) ☒

warn before double booking ☐

Double Booking Medicare = A patient with currently active Medicare primary coverage is scheduled for more than one appointment on the same date

prevent double booking of a medicare patient (except over canceled/rescheduled) ☒

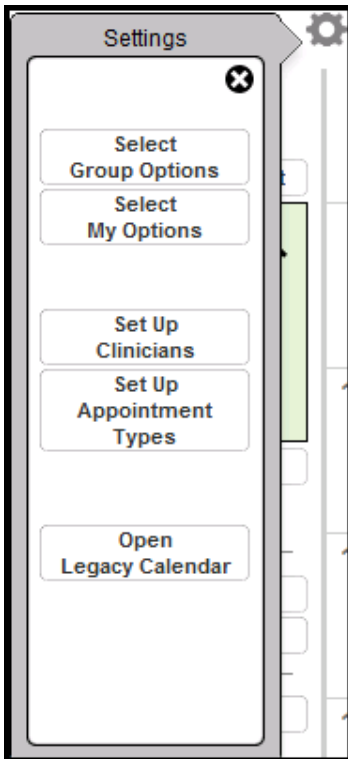
warn before double booking a medicare patient ☐

ICONS/VIEWS

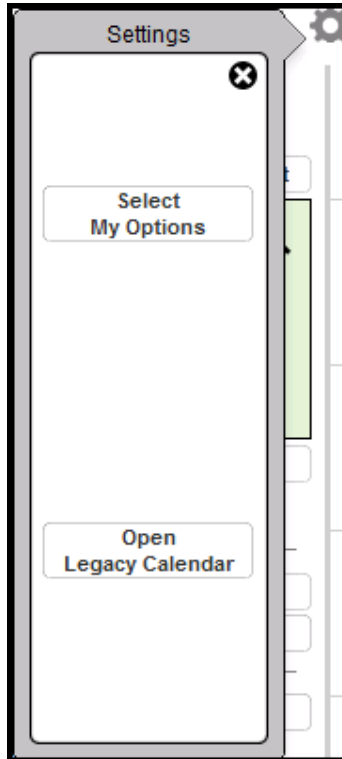
- Calendar Settings Covered in detail on Page 3.
- Show all day.
- Coloring by appointment status.
- Show Column Counts.
- Show All/Only Scheduled Clinicians.
- Select a Group to view.
- Select an individual Clinician to view.
- Schedule view - For all Clinicians in a group.
- Day view - For individual Clinicians.
- Week View - For individual Clinicians.
- Month View - For individual Clinicians.
- Grid view - For all Clinicians in a group.
- Refresh icon.
- Go To Today's Date
- Populate a mini calendar to select a specific month.

16. Move one day back or forward.
17. Help Icon.
18. Go back the specified number of months.
19. Go forward the specified number of months.
20. Go to the Messaging Center.

Calendar Settings Options:

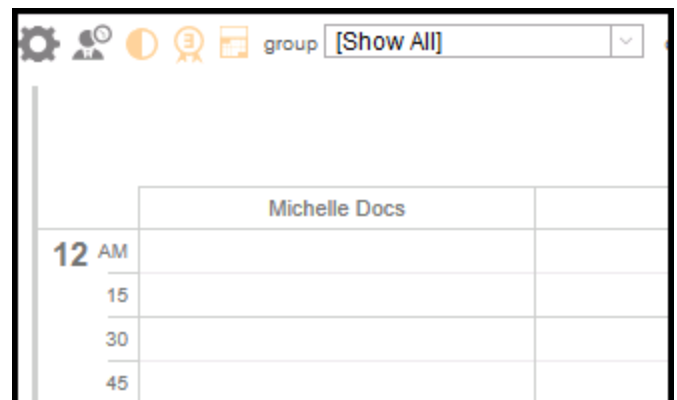


Group Admin View



Non-Group Admin View

Show All Day - The day will begin at 12:00 am rather than the hours that your practice has established for your practice. (2)



		Michelle Docs
9	00	\$ Shirley, Anne Initial Assessment (A) 1:00
	15	
	30	
	45	
10	00	King, Elle Chemical Dependency (X) 1:00
	15	
	30	
	45	
11	00	Group (2) Group (S) 1:00
	15	
	30	
	45	
12 PM	00	
	15	
	30	
	45	
1	00	
	15	
	30	
	45	
2	00	Blake, Anita Follow Up (S) 1:00
	15	
	30	
	45	
3	00	King, Elle Chemical Dependency (S) 1:00
	15	
	30	
	45	
4	00	
	15	Test, Patient Vitals/Injection (S) 0:15
	30	

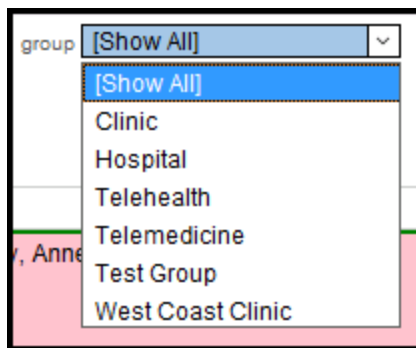
Click to swap colors between Status and Type - This will allow the appointment Status to show in a small bar along the right side of the appointment while the body of the appointment will show the appointment type color. (3)

Show Column Counts - Indicates how many appointments are scheduled for each clinician on the date selected. (4)

		group	[Show All]	clinician
8	00	Michelle Docs	5	Dr. Zepp
	15			

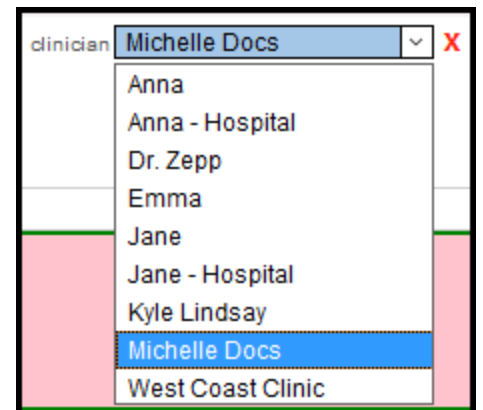
Show All/Show Only Scheduled Clinicians - This option allows your practice to show only clinicians that are scheduled appointments on a selected date. (5)

	Michelle Docs	Dr. Zepp	Emma
8:00			
8:15			
8:30			
8:45			
9:00	\$ Shirley, Anne Initial Assessment (S) 1:00	Group (2) Group (A) 1:00	Group (2) Group (A) 1:00
9:15			
9:30			
9:45			

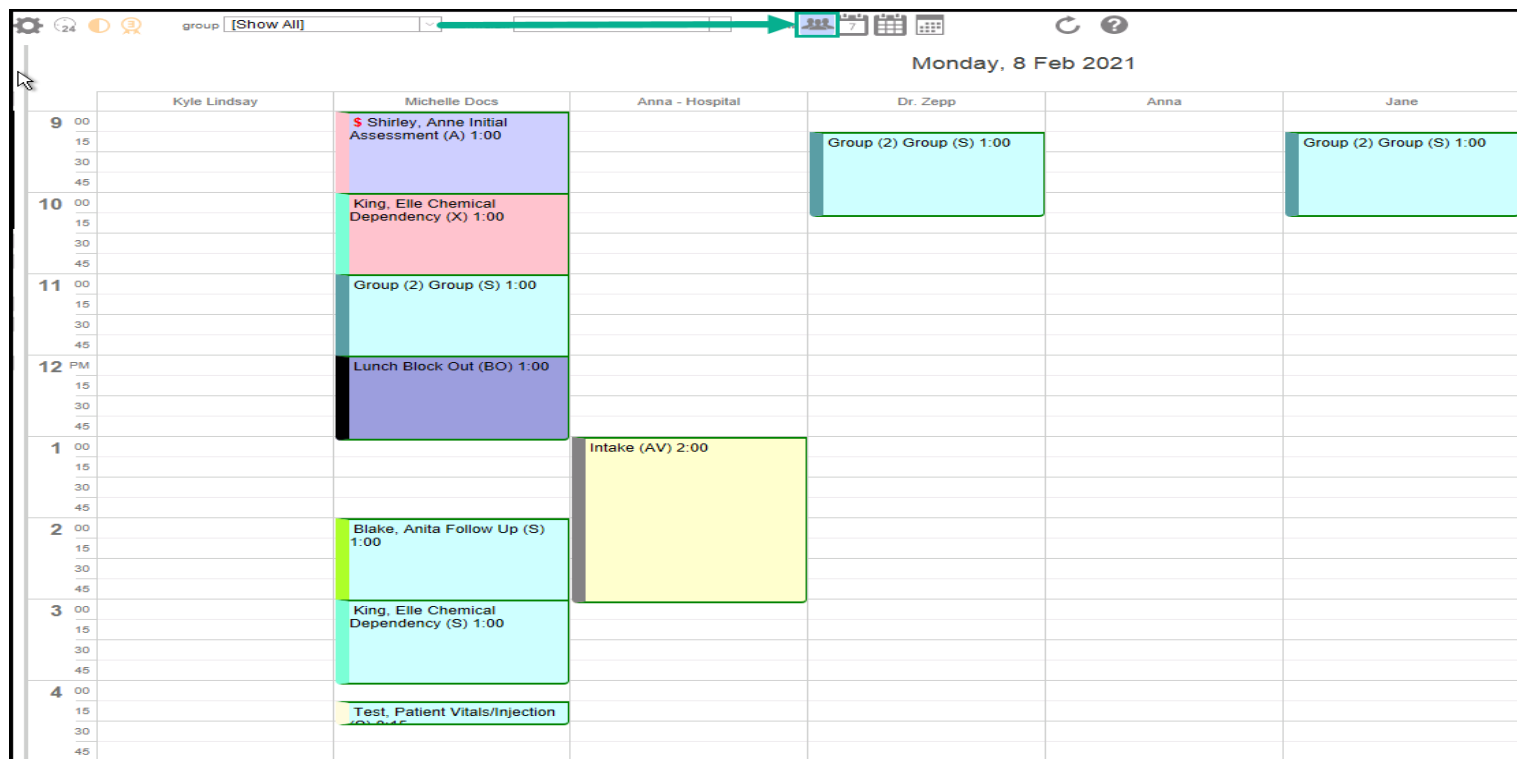


Group Filter - display events for clinicians in a group and hide all others. (6)

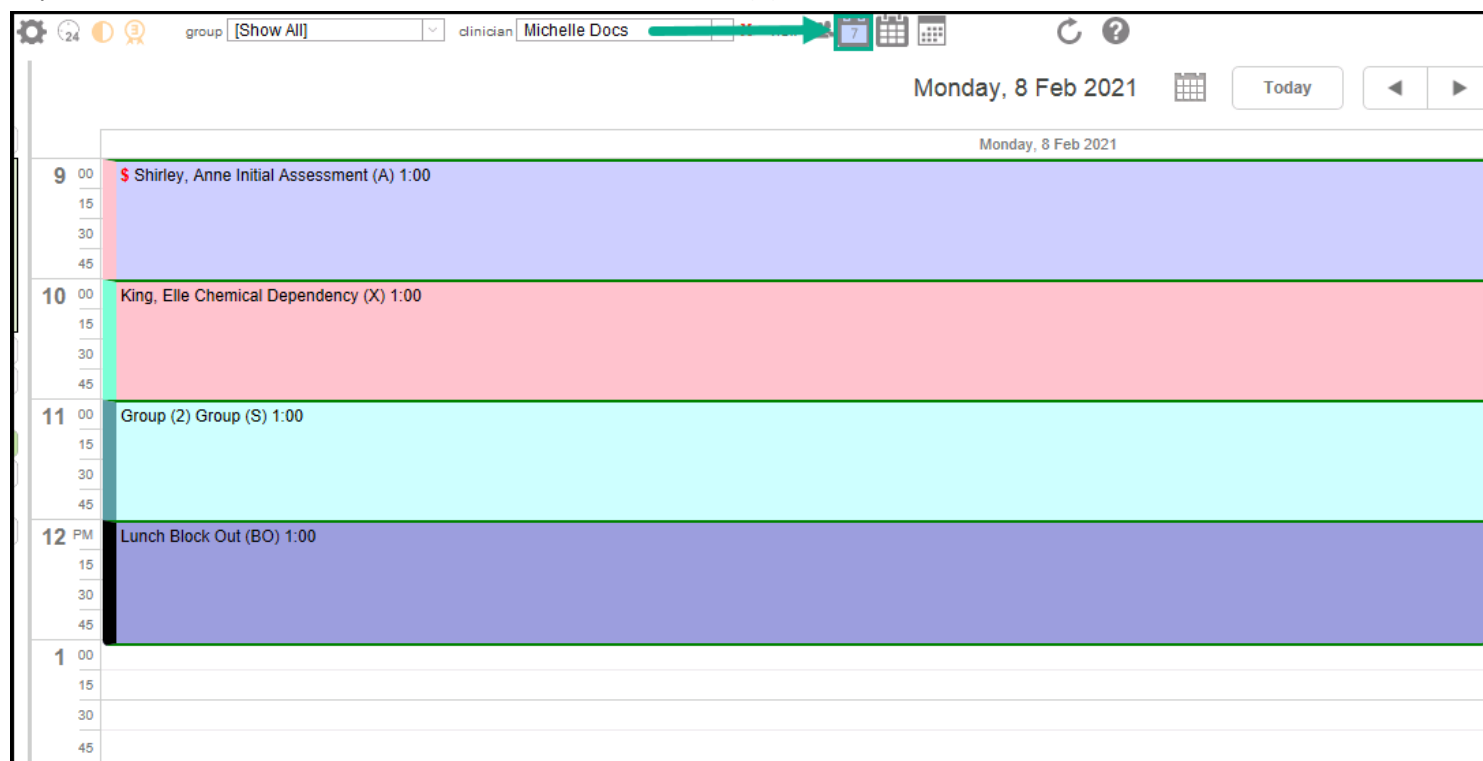
Clinician Filter - display events for the selected clinician and hide all others. (7)



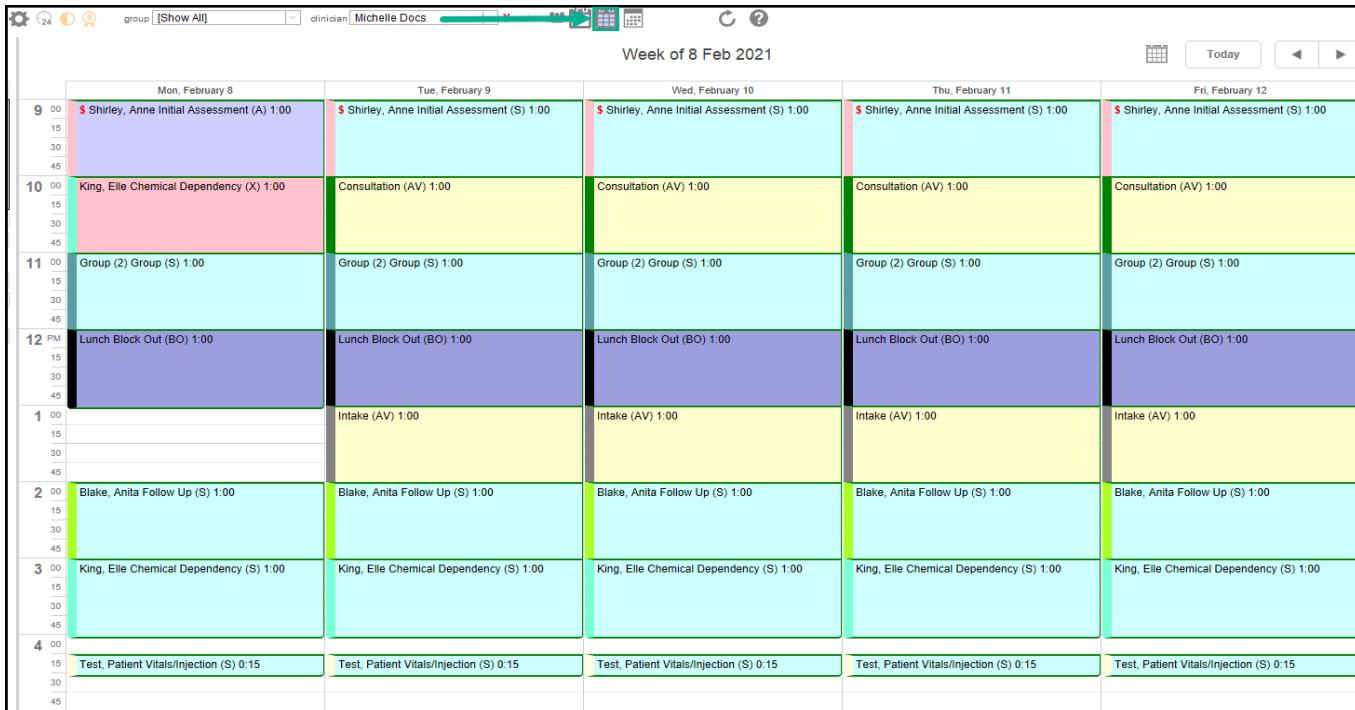
Schedule view (with group Clinic chosen)(8):



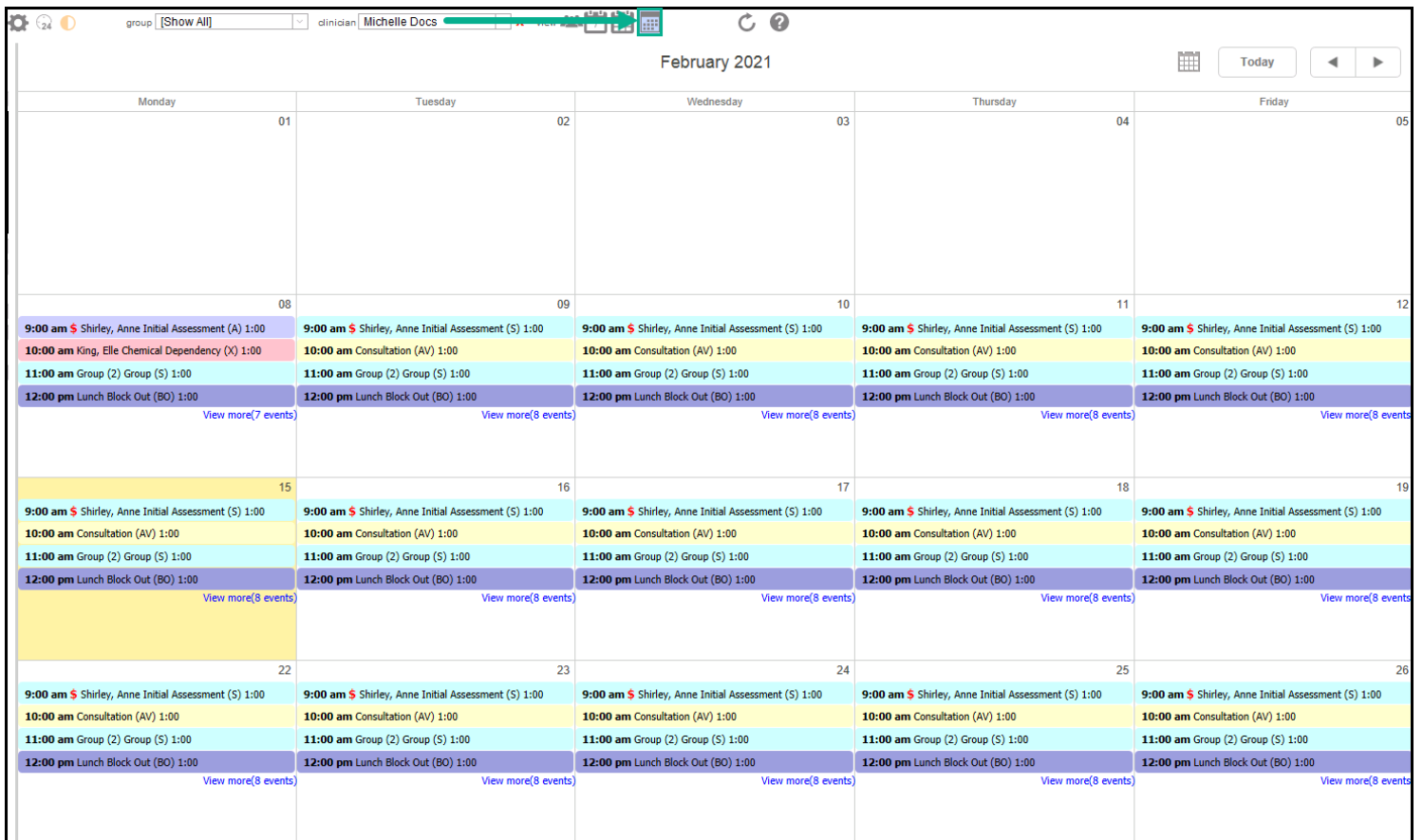
Day view – clinician needs to be selected for this view to work (9):



Week view - clinician needs to be selected (10):



Month view – clinician needs to be selected (11):



Grid view - Clinician does not need to be selected (12):

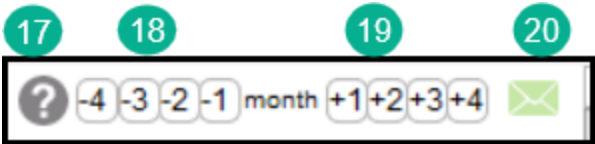
	9 am	10 am	11 am	12 pm	1 pm	2 pm	3 pm	4 pm
Michelle Docs	Shirley, Anne Initial Assessment (S) 1:00	Consultation (AV) 1:00	Group (2) Group (S) 1:00	Lunch Block Out (BO) 1:00	Intake (AV) 1:00	Blake, Anita Follow Up (S) 1:00	King, Elle Chemical Dependency (S) 1:00	Test, Patient Vitals/I (S) 0:15
Dr. Zepp	Group (2) Group (A) 1:00							
Jane								
Kyle Lindsay								
Anna								
Emma	Group (2) Group (A) 1:00							



Clicking Refresh will cause the calendar to re-load and update the displayed data. (13)
Clicking ‘Today’ will take you to the current date. (14)



Click this icon to populate a mini calendar. (15)
Click the arrows to move the calendar forward or back a day. (16)



Help - Click for tips. (17)
Move back 1-4 months. (18)
Move forward 1-4 months. (19)
Access the Messaging Center. (20)

SCHEDULING AN APPOINTMENT

There are three ways to schedule an appointment in the Calendar. The first is to double click on an open time slot in the calendar. The second is to click on the '+New Button'. Both of these methods have largely the same workflow.

If you choose the double-click cursor method, the appointment date and time and clinician's name will autopopulate. This is not the case if you click the '+New button'. You will need to manually add this to the Event Details window. If you have a default appointment type selected under group options, the appointment type will autopopulate. You can change any of these entries by editing in the Event Details window. The appointment book will autopopulate the patient's name if a patient is selected in the upper-left corner of the main calendar.

Event Details - Add

Edit Format

Patient

Date

Time to Length

Type

Clinician

Location

Status **S** C R NS A X Scheduled BO AV

Event Notes

Patient Calendar Notes

Copay

Request Payment

Cancel Delete Save More

To add a patient to the Event Details:

1. Click within the Patient field
2. Type the name of the patient
3. Select the patient.

Event Details - Add

Edit Format

Patient

Find Patient

Edit Format

Type Last Name, First Name, and/or ID [separated by spaces]

ca test 6 Patients Found (88 Total)

Press Enter to Find

	Patient Name	DOB	City, State Zip	Patient ID#	Status	Assigned Provider
select	1) Test Patient	6/28/1986	Windsor, PA 17366	2004689493ABC	ACTIVE	Jane Moody, LMFT
select	2) Charlotte Test	2/18/1992	Rutland, VT 05701	2004696085	ACTIVE	Joy Zepp, MD, PsyD
select	3) Katherine Test	1/10/1949	Gallatin, TN 37066	1000010670492	ACTIVE	Joy Zepp
select	4) Lisa S Test	1/8/1972	Gallatin, TN 37066	1000010670496	ACTIVE	Joy Zepp
select	5) Patient Test	3/2/2001	New York, NY 10108	23	ACTIVE	Michelle Docs
select	6) Testie Testtest	3/31/1950		4	ACTIVE	Jane Moody, LMFT

Event Details - Add

Edit Format

Patient **Test, Patient**
(3/2/01) #23

Date 2/12/21 - Fri

Time 9:00 am to 10:00 am Length 1:00

Type Follow Up

Clinician Select a clinician

Location Select a location

Status **S** C R NS A X

Event Notes

Patient Calendar Notes

Copay

Request Payment

Cancel Delete Save More

Print Reminder

Add People

Repeat

Demographics

Insurance

If you are scheduling a follow-up appointment for a patient, you can print out a reminder for him/her by clicking the 'Print Reminder' button.

The screenshot shows the 'Event Details - Edit' window with the following fields and options:

- Patient:** Test, Patient (3/2/01) #23
- Date:** 2/12/21 - Fri
- Time:** 4:15 pm to 5:15 pm
- Length:** 1:00
- Type:** Follow Up
- Clinician:** Michelle Docs
- Location:** Anne Arundel Medical Center
- Status:** S (selected), C, R, NS, A, X
- Event Notes:** (Empty text area)
- Patient Calendar Notes:** Sample Calendar Note
- Copay:** (Empty field with a dollar sign icon)
- Request Payment:** (Icon)
- Buttons:** Cancel, Delete, Save, and a blue 'More' button with three dots.
- More Menu:** A dropdown menu is open from the 'More' button, containing:
 - Print Reminder
 - Add People
 - Repeat** (highlighted with a green box)
 - Demographics
 - Insurance
 - New Note

You can choose to schedule a recurring appointment using the 'Repeat' button.

After all information for the appointment appears correctly on the Event Details window, click the 'Save' button to add the appointment to the calendar.

The third way to schedule an appointment is using the Find Openings feature. Clicking the 'Find Openings' button enables you to search for open appointment slots.

Seek

Search for Next Open Appointment Search will refresh with each change in your selection criteria

* Appt Length ☐ show Appt slots for this Length

* Clinician

Day(s) of Week [Mon-Fri] Sunday Monday Tuesday Wednesday Thursday Friday Saturday

Weeks from Today This Week

1	2	3	4
5	6	7	8
9	10	11	12
13	14	15	16
17	18	19	20
21	22	23	24

Select the Day(s) of Week and # Weeks from Today

or... Date Range from to

If a Date Range is Entered, then Day(s) of Week & # Weeks from Today will be Ignored

Click time slot to add appointment

2/12/2021 (Friday):

- 10:00 AM to 11:00 AM
- 1:00 PM to 2:00 PM
- 4:30 PM to 5:00 PM

* Required

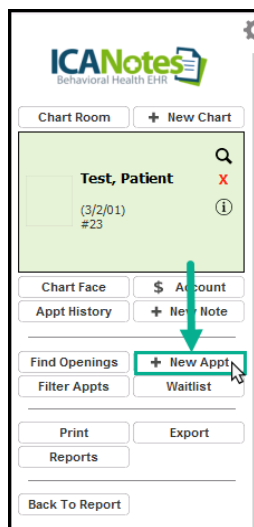
Using the Find Openings feature, you can search for an appointment slot based on appointment length, specific clinician, day(s) of the week, or a range of dates.

After you enter your desired criteria in the search window, the program will generate a list of open slots on the right.

If you click the checkbox labeled 'show Appt slots for this Length', all available individual appointment slots will be displayed in the circled column.

To schedule an appointment, click on the desired appointment slot on the right, and an Event Details window will open.

GROUP APPOINTMENTS



From the New Calendar, click the '+New Apt' button.

From the 'Event Details - Add' window, add the Patient, Date, Time, Type, Clinician, and Location of the appointment, then click the 'More' button in the bottom right.

 A screenshot of the 'Event Details - Add' window in the ICANotes system. The window has a title bar with a close button. Below the title bar are 'Edit' and 'Format' tabs. The form contains the following fields:

- Patient:** A dropdown menu showing 'Test, Patient (3/2/01) #23' with a search icon and a red 'X' icon.
- Date:** A date picker showing '2/12/21 - Fri'.
- Time:** A time picker showing '9:00 am' to '10:00 am' with a 'Length' of '1:00'.
- Type:** A dropdown menu showing 'Group'.
- Clinician:** A text input field showing 'Dr. Zepp'.
- Location:** A text input field showing 'Hokey Pokey Counseling'.
- Status:** A row of buttons: 'S' (selected), 'C', 'R', 'NS', 'A', 'X', 'Scheduled', 'BG', and 'AV'.
- Event Notes:** A text area with a scroll bar.
- Patient Calendar Notes:** A text area with a scroll bar.
- Copay:** A text input field with a 'Request Payment' icon.
- Bottom Bar:** Four buttons: 'Cancel' (with a red 'X' icon), 'Delete' (with a trash can icon), 'Save' (with a floppy disk icon), and 'More' (with a three-dot icon). A green arrow points to the 'More' button.

The screenshot shows the 'Event Details - Add' window. The 'Patient' field is set to 'Test, Patient (3/2/01) #23'. The 'Date' is '2/12/21 - Fri', 'Time' is '9:00 am' to '10:00 am', and 'Length' is '1:00'. The 'Type' is 'Group', 'Clinician' is 'Dr. Zepp', and 'Location' is 'Hokey Pokey Counseling'. The 'Status' is 'S'. A context menu is open over the 'More' button, with 'Add People' highlighted. Other menu options include 'Print Reminder', 'Repeat', 'Demographics', 'Insurance', and 'New Note'. At the bottom are 'Cancel', 'Delete', 'Save', and 'More' buttons.

Click 'Add People' from the menu.

The 'Event Details - Add' window expands to allow you to invite more Patients. Click the + to add another patient.

The screenshot shows the expanded 'Event Details - Add' window. The 'Patient' field now has a dropdown menu with 'Test, Patient' selected. A green arrow points to a '+' icon in the top right corner of the patient selection area. The 'Add From Roster' button is visible. The 'Date', 'Time', 'Length', 'Type', 'Clinician', and 'Location' fields remain the same. The 'Status' is 'S' and 'Scheduled' is selected. The 'Event Notes' field is empty. At the bottom are 'Cancel', 'Delete', 'Save', and 'More' buttons.

Select another patient from the Find Patient window.

Find Patient

Edit Format

Type Last Name, First Name, and/or ID [separated by spaces]
cancel 6 Patients Found (88 Total)

Press Enter to Find

	Patient Name	DOB	City, State Zip	Patient ID#	Status	Assigned Provider
select 1)	Test Patient	6/28/1986	Windsor, PA 17366	2004689493ABC	ACTIVE	Jane Moody, LMFT
select 2)	Charlotte Test	2/18/1992	Rutland, VT 05701	2004696085	ACTIVE	Joy Zepp, MD, PsyD
select 3)	Katherine Test	1/10/1949	Gallatin, TN 37066	1000010670492	ACTIVE	Joy Zepp
select 4)	Lisa S Test	1/8/1972	Gallatin, TN 37066	1000010670496	ACTIVE	Joy Zepp
select 5)	Patient Test	3/2/2001	New York, NY 10108	23	ACTIVE	Michelle Docs
select 6)	Testie Testtest	3/31/1950		4	ACTIVE	Jane Moody, LMFT

Event Details - Add

Edit Format

1 Patient

Add From Roster

Date

Time

Type

Clinician

Location

Status

Event Notes

Group Rosters

2 <<Select Roster>>

3 Add Patients from Selected Roster

Cancel

Cancel Delete Save More

The new patient will be added to the appointment. Continue with the steps above until all patients are selected.

You can also use the 'Add From Roster' button to add patients if you have set up Group Rosters.

1. Click on 'Add From Roster'.
2. Click 'Select Roster' to populate the list of rosters.
3. Once you have selected the roster you want to use, click on 'Add Patients from Selected Roster'.

The image shows two side-by-side windows from a software application.

Choose Clinician Window:

- Header: Choose Clinician
- Buttons: Cancel
- Text: Begin typing the name to filter the list below
- Search bar: (empty)
- List of clinicians:
 - Anna
 - Anna - Hospital
 - Dr. Zepp
 - Emma
 - Jane** (highlighted with a green border and a mouse cursor)
 - Jane - Hospital
 - Kyle Lindsay
 - Michelle Docs
 - West Coast Clinic

Event Details - Add Window:

- Header: Event Details - Add
- Buttons: Edit, Format
- Patient: Select a Patient (dropdown), Test, Patient, Smith, Summer
- Date: 2/12/21 - Fri
- Time: 9:00 am to 10:00 am, Length: 1:00
- Type: Group
- Clinician: Select a Clinician (dropdown), Dr. Zepp (highlighted with a green arrow pointing from the 'Jane' selection in the left window)
- Location: Hokey Pokey Counseling
- Status: S (selected), C, R, NS, A, X, Scheduled, BO, AV
- Event Notes: (empty text area)
- Bottom buttons: Cancel, Delete, Save, More

You can add Clinicians to the appointment the same way. Click the + by 'Select a Clinician'.

Choose the clinician from the 'Clinician' window.

The Clinician will be added to the appointment.

Once all is set, click the 'Save' button.

	Dr. Zepp	Jane
9 00		
15	Group (2) Group (A) 1:00	Group (2) Group (A) 1:00
30		
45		
10 00		
15		
30		
45		

The appointment will book under all Clinicians selected in the appointment.

When the Status is changed on the appointment, it will be reflected for all Clinicians. I can go into the appointment to add or remove patients (or clinicians) from the appointment.

You can see how many patients are scheduled in an appointment by the number in parentheses.

	Dr. Zepp	Jane
9 00		
15	Group (2) Group (A) 1:00	Group (2) Group (A) 1:00
30		
45		
10 00		
15		
30		
45		

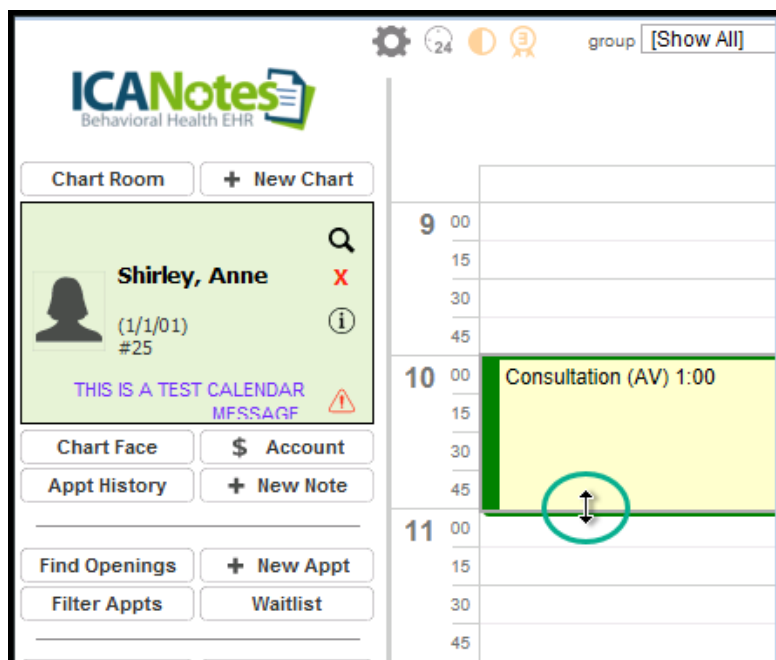
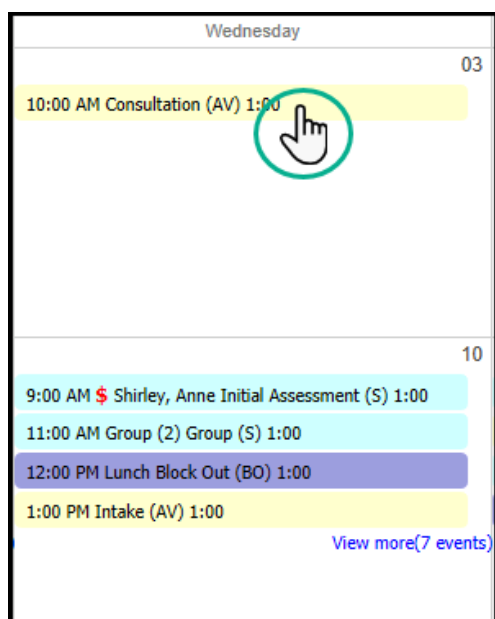
Hovering your cursor over the appointment will show the details.

	Dr. Zepp	Jane	Kyle Lindsay	Michelle
9 00				
15	Group (2) Group (S) 1:00	Group (2) Group (S) 1:00		\$ Shirley, Ann Assessment (A
30				
45				
10 00				
15				
	9:15 AM to 10:15 AM / Blake, Anita / Michaels, Elena / Group (S) / at Hokey Pokey Counseling			

Dragging and Dropping Appointments

Dragging and dropping appointments allows you to move a patient from one time to another by dragging the appointment. This can be used in any of the views.

Hover your cursor over the appointment and when the arrow becomes a hand, grasp the appointment and drag it to the new time, day, or clinician.



Length of session can also be adjusted. Hover near the bottom of an appointment until you see your cursor has an arrow on each end. Drag the appointment to be the desired length. Once released, the appointment will update to the correct length.

Event Details - Edit

Patient ⓘ

Date Repeats Daily Until 3/10/2021

Time to Length

Type

Clinician

Location

Status

Event Notes

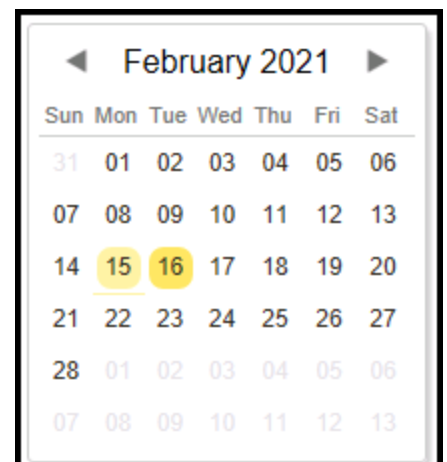
Patient Calendar Notes

Copay

Appointments that are updated in this manner will populate an Event Details window allowing you to click 'Cancel' to revert the changes or click 'Save' to accept the changes.

PRINTING AN APPOINTMENT LIST

To print out a list of appointments for a specific date, select on the desired date on the calendar.



ICA Notes
Behavioral Health EHR

Chart Room + New Chart

Test, Patient
(3/2/01)
#23

Chart Face \$ Account
App History + New Note

Find openings + New Appt
Filter Appts Waitlist

Print Export
Reports

Back To Report

Click on the 'Print' button located on the right.

The Event Print Options window will populate, allowing you to select the appointment types you want included on your printed list as well as how you want patient information to print.

Print Options for Monday, February 15, 2021

Edit Format

Event Print Options Monday, February 15, 2021

include ☒ Scheduled
☒ Confirmed
☒ No Show
☒ Attended
☐ Rescheduled
☐ Cancelled

sort priority ☒ Clinician
☐ Time

☐ Available
☐ Block Out

select one ☒ Print/Preview with FULL patient info
☐ Print/Preview with LESS patient info
☐ Print/Preview with MINIMAL patient info

☐ Include Patient Diagnosis & Current Medications
☐ Combine Clinician Appointments into composite Appointment Print List Report

no. copies Will print specified no. of copies PER clinician scheduled

Do not enter this no. of copies in the PRINT pop up

Cancel ☐ Default Options **Print**

If you select FULL patient info, your printed list will include appointment information and basic patient demographics including:

- name
- chart ID
- DOB
- contact phone numbers
- number preferred by patient
- insurance information
- any calendar note that has been set up for this patient
- number of patients being seen by the clinician for this day

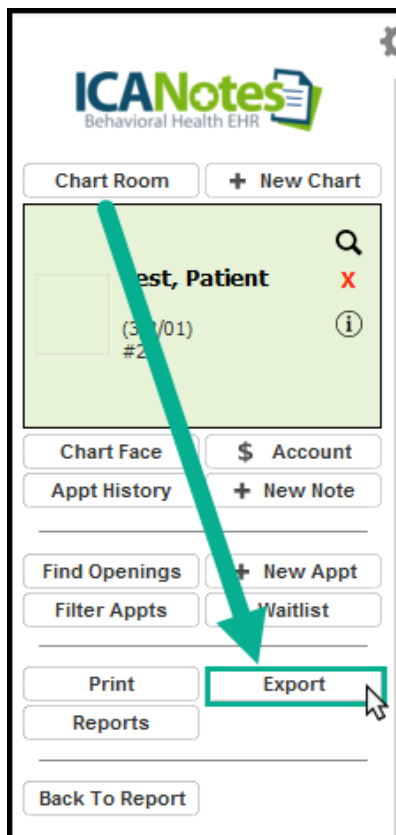
If you select LESS information, insurance information and calendar notes will not be printed.

You will also be able to include patient diagnosis on each event that's printed or print a certain number of copies for each clinician assigned to an event.

Select 'Print' to continue.

EXPORTING AN APPOINTMENT LIST

To export a list of appointments from the calendar, click on the 'Export' button.



Enter the date range for the appointments you want to include in the file. If you want tomorrow's appointments called tonight, you would enter the start and end date as tomorrow's date.

Options

Event Export Options

date range: 2/15/2021 to 2/15/2021

status
select all

- ☐ Scheduled
- ☐ Confirmed
- ☐ No Show
- ☐ Attended
- ☐ Rescheduled
- ☐ Cancelled
- ☐ Available
- ☐ Block Out

clinician
select all

- ☐ Anna
- ☐ Anna - Hospital
- ☐ Dr. Zepp
- ☐ Emma
- ☐ Jane
- ☐ Jane - Hospital
- ☐ Kyle Lindsay
- ☐ Michelle Docs
- ☐ West Coast Clinic

Cancel Export

Check the Scheduled box if you want all scheduled appointments to be included. Add other Status as desired.

Options

Event Export Options

date range: 2/15/2021 to 2/15/2021

status
select all

- ☒ Scheduled
- ☐ Confirmed
- ☐ No Show
- ☐ Attended
- ☐ Rescheduled
- ☐ Cancelled
- ☐ Available
- ☐ Block Out

clinician
select all

- ☐ Anna
- ☐ Anna - Hospital
- ☐ Dr. Zepp
- ☐ Emma
- ☐ Jane
- ☐ Jane - Hospital
- ☐ Kyle Lindsay
- ☐ Michelle Docs
- ☐ West Coast Clinic

Cancel Export

Check the providers whose appointments you want to include in the file.

Options

Event Export Options

date range: 2/15/2021 to 2/15/2021

status: ☒ Scheduled
☐ Confirmed
☐ No Show
☐ Attended
☐ Rescheduled
☐ Cancelled
☐ Available
☐ Block Out

clinician: ☐ Anna
☐ Anna - Hospital
☐ Dr. Zepp
☐ Emma
☐ Jane
☐ Jane - Hospital
☐ Kyle Lindsay
☐ Michelle Docs
☐ West Coast Clinic

Cancel Export

Click the 'Export' button in the lower right of the pop-up box.

Options

Event Export Options

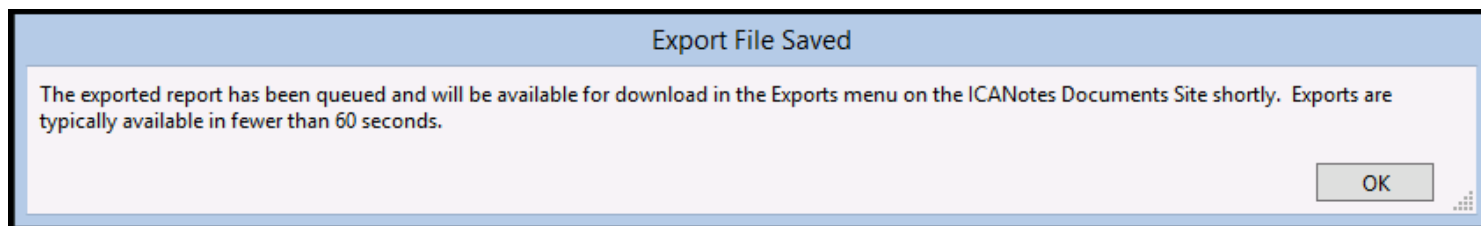
date range: 2/15/2021 to 2/15/2021

status: ☒ Scheduled
☐ Confirmed
☐ No Show
☐ Attended
☐ Rescheduled
☐ Cancelled
☐ Available
☐ Block Out

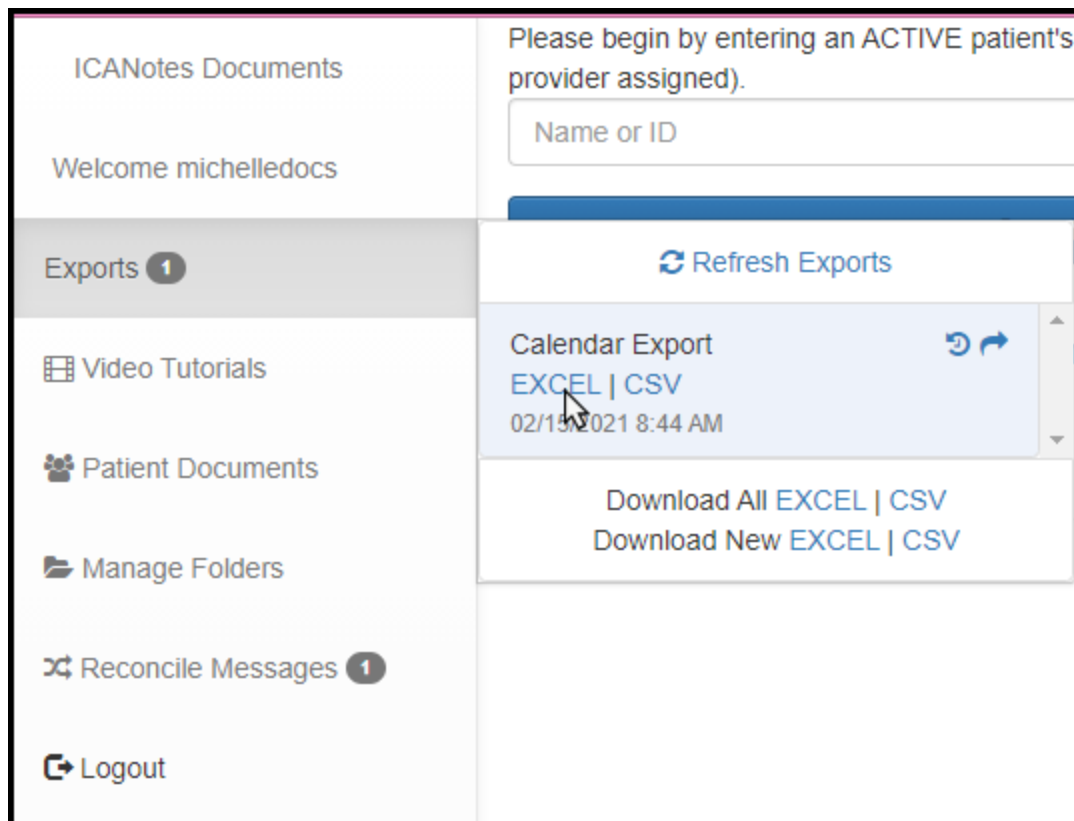
clinician: ☐ Anna
☐ Anna - Hospital
☐ Dr. Zepp
☐ Emma
☐ Jane
☐ Jane - Hospital
☐ Kyle Lindsay
☒ Michelle Docs
☐ West Coast Clinic

Cancel Export

You will see a message telling you that you can download the file from the Upload Site.



On the Upload Site, download the file as an EXCEL or CSV file.



Save the report to your local device and open with the program of your choice.