

# Appointment-plus User Guide

Foundation Communities Financial Coaching Program

Updated 12/2014

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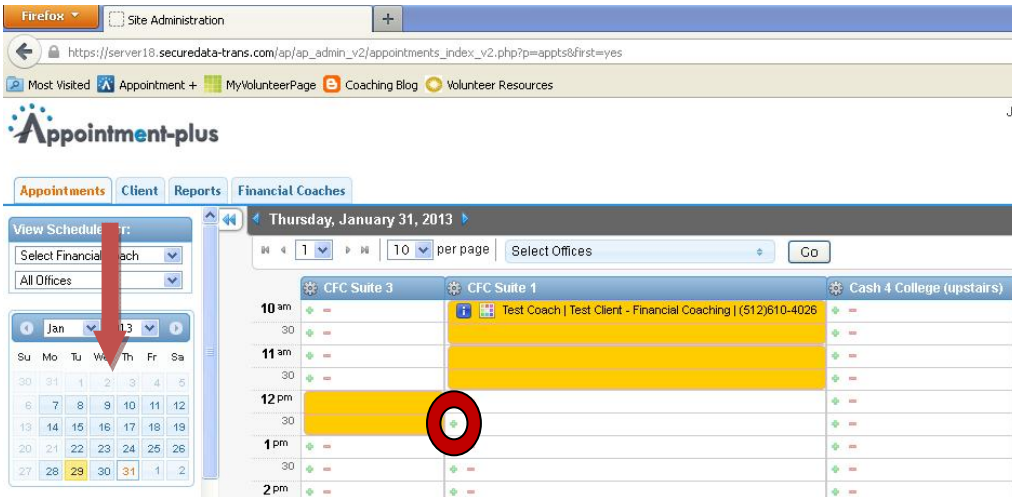
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## **PLEASE DO NOT CANCEL APPOINTMENTS IN APPOINTMENT PLUS**

This will send a cancellation email to the client. We prefer to give the client the opportunity to reschedule first.

### **Quick reference** *Setting an appointment*

1. Log in to appointment-plus.com. If this is your first time, your username is your email address, and your temporary password is "foundcom".
2. To the left of the default appointment grid, you will see a calendar. Select the date of your next appointment.



3. On the grid, click the plus (+) sign next to your desired time. If no offices are available, you will need to choose another time or date when there is available
4. An appointment window will open. Search for your client by first or last name. Choose the client's name from the results drop-down menu on the left.

A screenshot of the "Make Appointment" form. The form has a "Finalize Appointment" button at the top right. On the left, there is a "Client" dropdown menu with a list of names, including "Client Test" which is selected. Below the client list are fields for "Assigned To" and "Referred By". The main form area contains fields for "With" (Test Coach), "Office" (CFC Suite 3), "Service" (Select Service), "Date" (Friday, February 8, 2013), "Time" (9:00am), and "Status" (Scheduled). There are two text areas: "Special Instructions for Client" containing "Hi Test, make sure to bring the documents we talked about last time: -Student loan documentation -Pizza" and "Appointment Notes (internal only)" containing "Ms. Client might be running a little late. Her car exploded." There are checkboxes for "Send appointment e-mail to client" and "Send appointment e-mail to financial coach", both checked. The "Created By" field is "Test Coach". Two callout boxes with arrows point to the text areas: the first says "\*Special Instructions will be included in the notification emails that are sent to the client. This is also where messages from the client will appear." and the second says "\*Appointment Notes will be seen in your own email notifications, and are used by staff to keep notes on specific appointments." A "Make Appointment" button is visible at the top left of the form area.

5. Verify that the time, date, and service are all correct.
6. Click "Finalize Appointment."
7. If you get an error message, see the next page of Common Errors. If the problem persists, please contact a staff member to assist you.

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*Common Errors*

1. **You get an error about the office.** You will not be able to schedule an appointment for an office that is already in use for a specific time and date. If you attempt to do so, you will see the following error message. **Fix:** will need to reschedule for a different time or date. If you've already told your client that your appointment will be at the conflicting time, please notify staff, and they will work to reschedule.

Make Appointment

Finalize Appointment

**X** The service selected does not fit within the time slot selected for this office, please select another time

Client	Test	With	Test Coach	view
First Name	Test	Office	CFC Suite 1	
Last Name	Client	Service	Financial Coaching	
Zip Code		Date	Friday, February 8, 2013	
Primary Phone	(512)610-4026	Time	9:30am	
Alternate		Status	Scheduled	

2. **Your "Service" drop-down is blank.** This means that you have deselected a specific weekday under your profile's "Services Offered" page. This option overrides all administrative and user power to schedule a service on a given day. **Fix:** Update your "Services Offered" to accept all weekdays for the given service. In the future, use your "Schedule" and "Days off" to indicate when you're unavailable. You will never be scheduled on a day that you haven't listed on your availability.

Finalize Appointment

Client	Test	With	Test Coach	view
First Name	Test	Office	CFC Suite 3	
Last Name	Client	Service	Select Service	
Zip Code		Date	Select Service	February 28, 2013
Primary Phone	(512)610-4026	Time	10:00am	
Alternate		Status	Scheduled	

3. **You cannot change your "Schedule" or mark a specific "Day off."** If you already have an appointment scheduled for a specific day, you will not be allowed to change your availability. This is done to prevent the accidental cancellation of an appointment. **Fix:** Let us know that you need to cancel, so that we can arrange another opportunity for that client.

Schedule

**X** You cannot make Wednesday a closed day because appointments exist on that day of the week

Test Coach					
Monday	<input checked="" type="checkbox"/> off	Start time	Select Start Time	End time	Select Close Time
Tuesday	<input checked="" type="checkbox"/> off	Start time	Select Start Time	End time	Select Close Time
Wednesday	<input checked="" type="checkbox"/> off	Start time	10:00am	End time	7:00pm

Days Off

**X** You cannot make the following dates off days because appointments exist on them: 02/27/2013

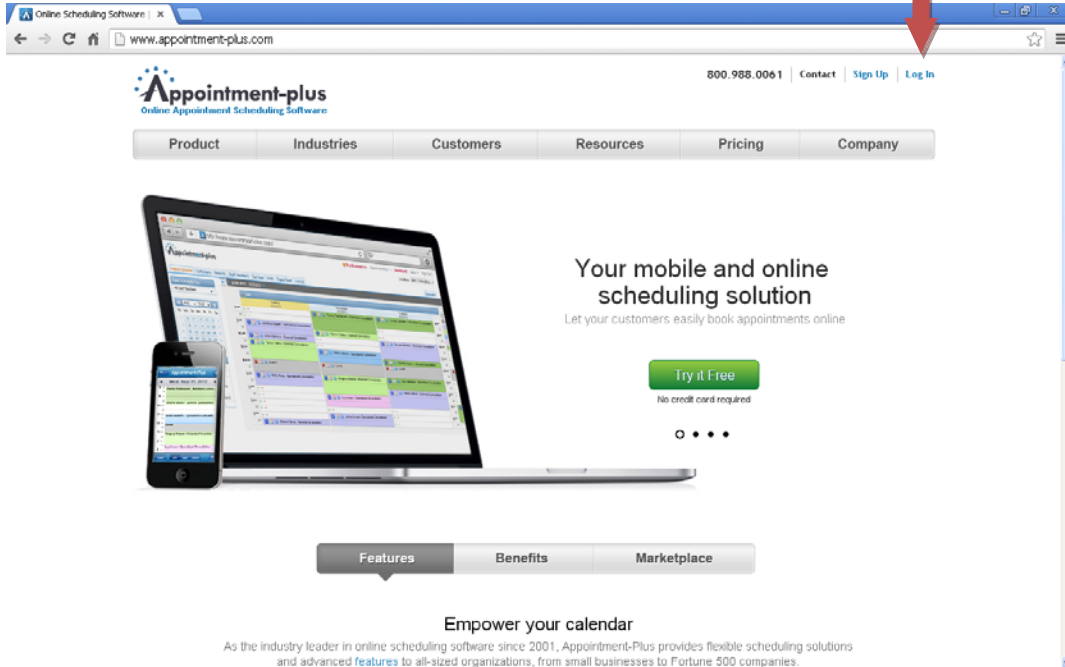
Test Coach	
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## **PLEASE DO NOT CANCEL APPOINTMENTS IN APPOINTMENT PLUS**

This will send a cancellation email to the client. We prefer to give the client the opportunity to reschedule first.

### **Logging in:**

- Go to <http://www.appointment-plus.com>
- Click Log in on the upper right corner of the page



- The first time you log on, your username and password will be as follows:

- o **Username: [your email address]**
- o **Temporary Password: foundcom**
- You will be then be prompted to create your own password. This will now be the password you use any time you log in. If you forget your password, there is an email retrieval tool. Staff can also reset your password upon request.

**PLEASE DO NOT CANCEL APPOINTMENTS IN APPOINTMENT PLUS**

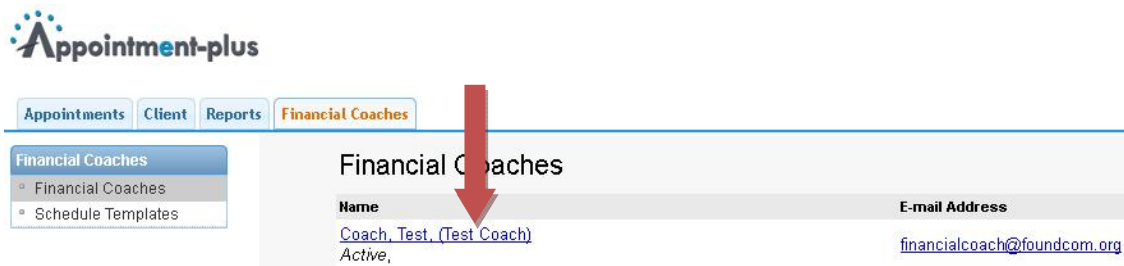
This will send a cancellation email to the client. We prefer to give the client the opportunity to reschedule first.

**Manage your profile and schedule (FINANCIAL COACHES TAB)**

Please start in the Financial Coaches tab. This is where you will be able to manage your own profile and general schedule.

*Your information:*

1. In the Financial Coaches tab, click your name. This will lead you to your profile.



2. Please leave your preferred name as your Screen Name. This is what clients will see when they are scheduling an appointment, and in their email reminders.



3. You don't need to add any personal information outside of what is already provided\*. Appointment-plus is specifically being used to manage schedules.

*\*For your convenience, we ask that you provide us a phone number where you can be reached on days of appointments. This number can only be seen by staff, and we will only call it in the event of a late client cancellation.*

*Your schedule:*

The Financial Coach Information page is the main place where you can control your availability for Financial Coaching clients. You should use this section to designate your regular weekly schedule of availability. CFC staff will create your original schedule based on the availability you provided during training. After that, you can (and are highly encouraged to) update your availability any time your regular schedule changes.

**Schedule - Setting your regular availability:**

1. In your Financial Coach Information page, click "Schedule" in the left-hand sidebar.

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- Designate the times when you are available for Financial Coaching clients by unchecking the “off” box and indicating the hours you are available.

**Schedule**

Test Coach

Monday	<input checked="" type="checkbox"/> off	Start time	Select Start Time ▾	End time	Select Close Time ▾
Tuesday	<input checked="" type="checkbox"/> off	Start time	Select Start Time ▾	End time	Select Close Time ▾
Wednesday	<input type="checkbox"/> off	Start time	10:00am ▾	End time	2:00pm ▾
Thursday	<input type="checkbox"/> off	Start time	5:00pm ▾	End time	7:00pm ▾
Friday	<input checked="" type="checkbox"/> off	Start time	Select Start Time ▾	End time	Select Close Time ▾
Saturday	<input checked="" type="checkbox"/> off	Start time	Select Start Time ▾	End time	Select Close Time ▾
Sunday	<input checked="" type="checkbox"/> off	Start time	Select Start Time ▾	End time	Select Close Time ▾

Update

- We suggest limiting your availability to just a few hours each day to limit the possibility of having to make multiple trips to the Community Financial Center (for example, if a client requests an appointment with you at 11 and another requests an appointment at 4 pm on the same day).

➤ Notes about your general availability:

- Clients can see all available Financial Coaches’ schedules one month ahead of time.
- If you do not wish to take any new clients for now, be sure to check “off” every day of the week in your schedule.

*Days off - Taking specific days off:*

This feature should be used for days you would typically meet with clients, but may be taking off for vacation, work, etc.

- Click “Days Off” in the left-hand sidebar.
- Click the checkbox for each day that you will not be available.
- Scroll down and click “Update”. **If you don’t click update, you will still be available!**



...after clicking “update” ...



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*Schedule Exceptions - Adding availability to your regular schedule:*

Adding an exception will **create** availability for the specified time on that date, overwriting your normal schedule. This means that you *will be* available during the exception. In the example below, let's assume that our Test Coach is normally available on Wednesday's from 10am-2pm, and is normally *not* available on Mondays. However, after adding these exceptions, he has reduced his Wednesday availability by two hours, and he has opened a slot on Monday that would not normally be available.

Date	Start Time	End Time	
Wednesday, February 13, 2013	12:00pm	2:00pm	Delete
Monday, February 18, 2013	2:00pm	5:00pm	Delete
Select Date <input type="button" value="v"/>	Select Start Time <input type="button" value="v"/>	Select End Time <input type="button" value="v"/>	Add



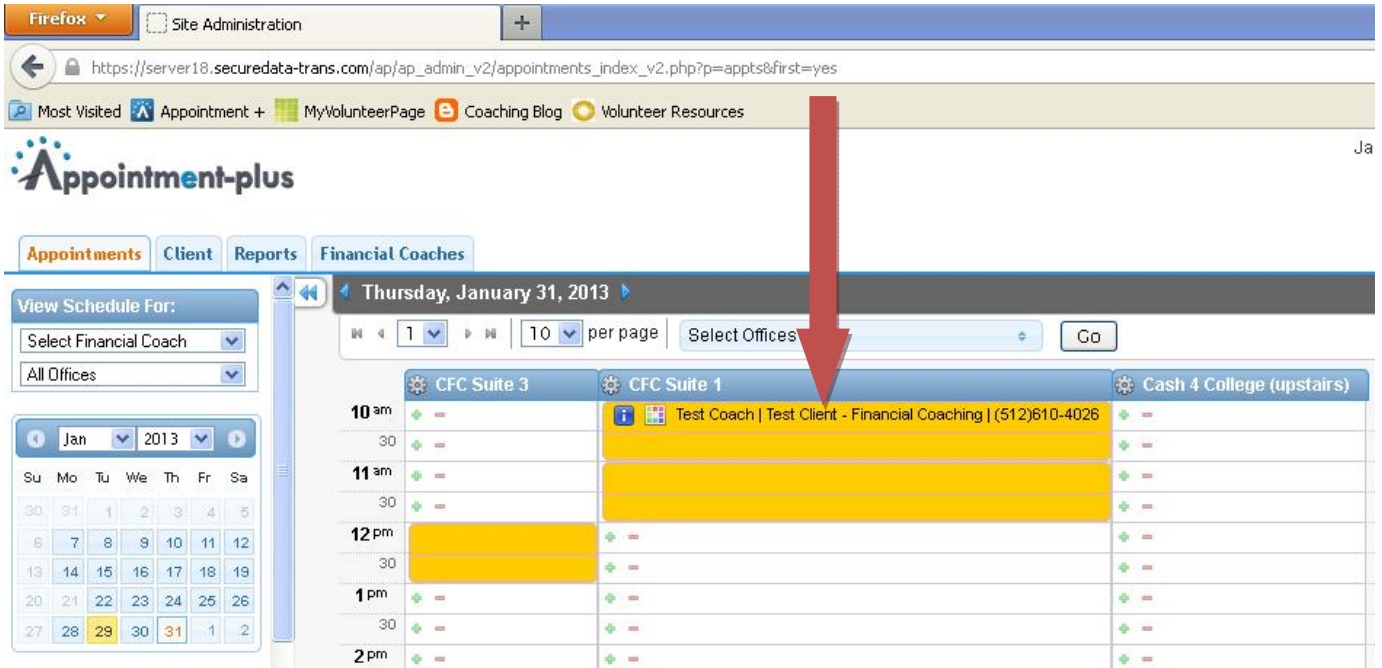
**PLEASE DO NOT CANCEL APPOINTMENTS IN APPOINTMENT PLUS**

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**Manage your appointments (APPOINTMENTS TAB)**

*Viewing the Financial Coaching calendar:*

- When you log in, you will be on the Appointments Tab. You will see the program’s appointment grid for today.
- Only your appointments will show appointment details. Other coach’s appointments will be solid colored blocks. While you can see the clients’ personal information, please leave all scheduling changes and client contact to the CFC staff. If you have any issues, don’t hesitate to email or call.



- You have the choice to look at your schedule in various views. If you would like to see what your weekly or monthly calendar looks like, hover over the gear next to any office name. This should give you a drop-down menu...



- Once you’ve chosen your preferred view, you can use the “View Schedule for” options on the left side. Under “select financial coach,” you can choose to view your personalized schedule for the week or month.

To return to your original view, simply click the “Appointments” tab on the top menu bar.



## **PLEASE DO NOT CANCEL APPOINTMENTS IN APPOINTMENT PLUS**

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### *Scheduling appointments:*

- Note that when a client schedules an appointment with you from the public site, you will receive an email notification and the appointment will automatically be added to the schedule.
1. Click the date on the calendar that's on the left side of the screen. Once on that date, look at the appointment grid. Click on the plus sign that corresponds with the time you'd like to meet. You will be taken to a screen where you can fill out specific info for that session.

Make Appointment

Finalize Appointment

Client, Test

Caul-Dukes, Mary  
Cepeda, Vannesa  
chaix, mcael  
Channer, Delroy  
Chapman, Amanda  
Chatman, Clifton  
chavez, maria  
Cisneros, Adela  
Cisneros, Isaac  
Cisneros, Jerome  
Cisneros, Jerome  
Claps, Kathleen  
Clark, Valisa  
Client, Test  
Clift, Donna  
Clotiaux, Laura  
Collins, Harolyn  
Colocho, Rosa  
Conejo, Luis  
Contreras, Araceli

Client type Select One

Assigned To Select One

Referred By

With Test Coach [view](#)

Office CFC Suite 3

Service Select Service

Date Friday, February 8, 2013

Time 9:00am

Status Scheduled

**Special Instructions for Client**

Hi Test, make sure to bring the documents we talked about last time:  
-Student loan documentation  
-Pizza

**Appointment Notes (internal only)**

Ms. Client might be running a little late. Her car exploded.

Type one-time appointment

Send appointment e-mail to client

Send appointment e-mail to financial coach

Created By Test Coach

2. On the left side of the appointment window, select your client's name from the drop-down menu.
3. On the right side, your name will already be selected as the coach.
4. Select the office, and select the service (you will only see the service(s) that you are approved to provide).
5. The date and time will default to the ones you chose on the schedule. You can adjust if necessary.
6. Leave the Status as Scheduled. Someone from our staff will change it to Confirmed when the client has confirmed that they will be attending.
7. If you have any special instructions you want to pass on to the client (i.e., remember to bring your credit card statement), you can input these in the "Special Instructions for Client" box. **IMPORTANT:** Remember that these notes will be emailed to the client. If you have any notes/reminders for yourself that you do not want the client to see, you can use the "Appointment Notes (internal only)" box.
8. Choose whether to schedule a one-time appointment or a recurring appointment. Recurring appointments will happen at even intervals as decided by you and the client.
9. Please keep the "Send appointment email..." boxes checked so that both you and the client get emails regarding this appointment.

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10. Click the “Finalize Appointment” button at the top of the page. The appointment will now show up on the calendar. If you get an error message, take a look at our page of Common Errors for a solution.

*Blocking off unavailable time – This should be used during times when you are typically available for Financial Coaching clients but are unavailable for a section of the day. We recommend this for days when you’ve already been scheduled, but don’t want to take any more clients. Otherwise, we recommend using “Days off.”*

In the appointment grid, see the panel on the left

1. Under “View Schedule For,” choose your name in the Financial Coach drop down list
2. This will bring up your appointment grid
  - \*Make sure you are seeing your appointment grid, with your name at the top, or else you will only reserve an office and you will still be available for client appointments.*
3. Navigate to the appropriate day using the calendar in the left panel
4. Notice the plus sign and lightning bolt in each time slot.
  - a. The lightning bolt will block off a 30-minute time slot with one click.
  - b. The plus sign will allow you to schedule an appointment or, by choosing the “Reserve Time” tab, block off a time slot for a specific time range and with a specific reason.
5. In your appointment grid for that day, click the plus sign
6. A new appointment window will open
7. Click on the “Reserve Time” tab at the top of the window
8. Add notes and designate a specific time and click “Update”

When a time is reserved, the red “X” will un-reserve that time.

#### **Appointment status color key:**

Each appointment on your calendar displays with a background color and a box of different colors. The background color corresponds to the status of the appointment—Scheduled, Confirmed, Complete, No Show—The Financial Coaching staff will make sure these are up to date.

### *Appointment Notifications:*

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Appointment-plus is configured to send automatic notifications to help keep the coaches, staff, and clients in communication about scheduled sessions. While not the prettiest of formats, appointment emails will include appointment date and time, and can also include notes for/from the client and staff. Appointment emails will look like this:

First Name: Test

Last Name: Client

Address:

City:

State:

What would you like to work on with your Financial Coach?:

Date: Friday, February 15, 2013

Time: 11:00am

Financial Coach: Test Coach

Service: Financial Coaching

**Special Instructions:** How to better manage my money, improve my credit, budget and save, as well as financial aid advice for going back for a Master's degree.

**Internal Notes:** Hi Test Coach--Ms. Client has to pick her daughter up from daycare, and she might be ten minutes late for her appointment. Thanks for your patience!

We also use other notifications to communicate appointment details to you and the client:

Type of email	Sent to Client	Sent to Coach	Notes
Appointment Scheduled	Yes	Yes	Anything typed in the "Special Instructions for Client" box will be emailed to the client. If you have reminders/notes for yourself, type them in "Appointment Notes (internal only)."
Appointment Reminder	Yes	No	Sent two days before the appointment. Special instructions will be included in this email.
Appointment Confirmed	Yes	No	Sent when the appointment status is changed from Scheduled to Confirmed.
No-show	Yes	No	Sent when the appointment status is changed to No-show, inviting them to reschedule.
Appointment Cancellation/Change	Yes	Yes	Sent when an appointment is changed or cancelled by client, staff or coach.

I get different appointment notifications. What do they mean?

**-Appointment Notification:** A staff member scheduled an appointment for you

**-On-line Appointment Notification:** A client scheduled his or her own appointment with you

**-Appointment Cancellation Notification:** A staff member or the client cancelled the appointment

**-Appointment Change Notification:** A staff member or client changed the day and/or time of your appointment;

OR a staff member added notes about the appointment; OR the client originally had an appointment with

another coach, but the coach had a schedule conflict and the client was re-assigned to you.

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## **Client information (CLIENTS TAB)**

### **Search, Add, Merge**

YOU DO NOT NEED TO USE THESE FEATURES. If you are scheduling an appointment with a new client, you can add their information straight into the appointment window (instead of searching for and selecting an existing client).

**NOTE:** The purpose of listing clients and their contact information in Appointment-plus is to have it readily available at a glance as you are looking at your schedule, not to have it serve as the main place to store client information. If the client updates his or her email or phone number with you, make sure to let the Financial Coaching staff know so that we may make the same changes to that client's entry in our client database.