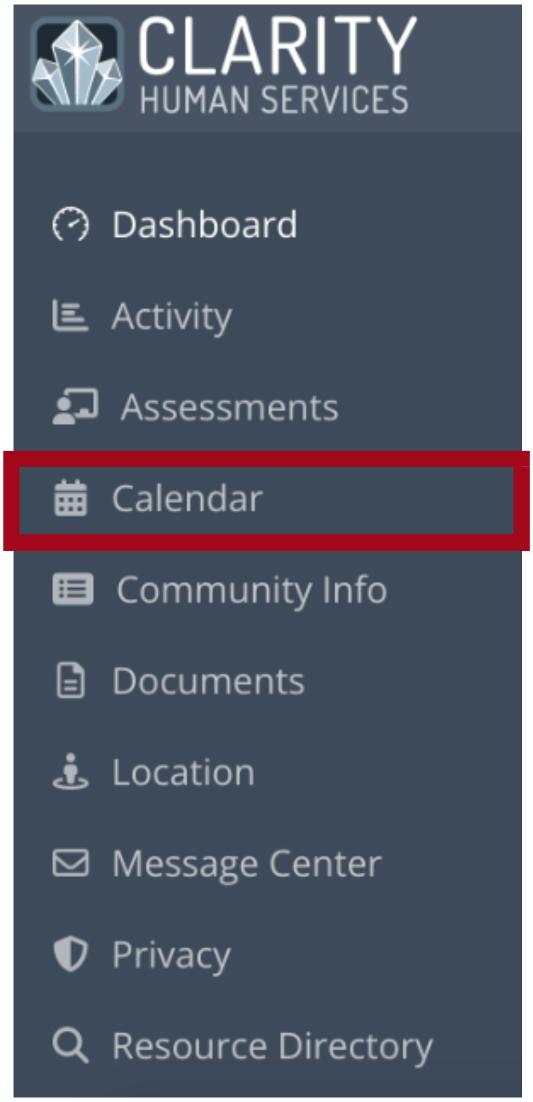
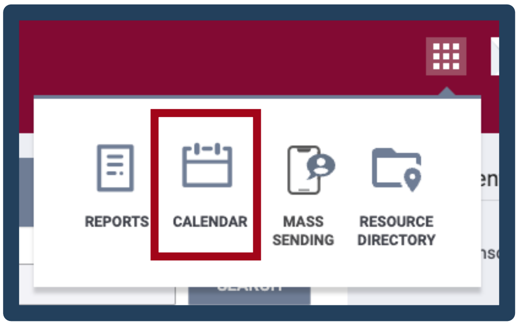
CALENDAR

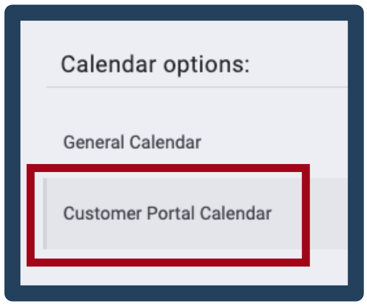
The Calendar feature allows providers to schedule client appointments and post appointment availability directly within Clarity. Clients can schedule appointments with care team members based on their posted available time slots. Appointment details and notifications are then made available to the client through their **MyConnect**SV account. The Calendar allows providers to manage all client appointments in one centralized location and ensures clients always have access to appointment details.



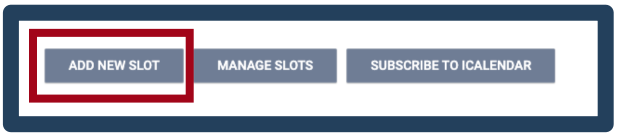
How to Post Available Appointment Slots

In Clarity, navigate to the Calendar in the launchpad, and then click on "Customer Portal Calendar" in the right sidebar:

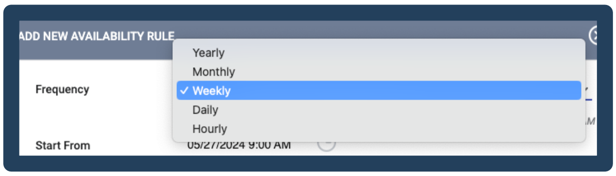




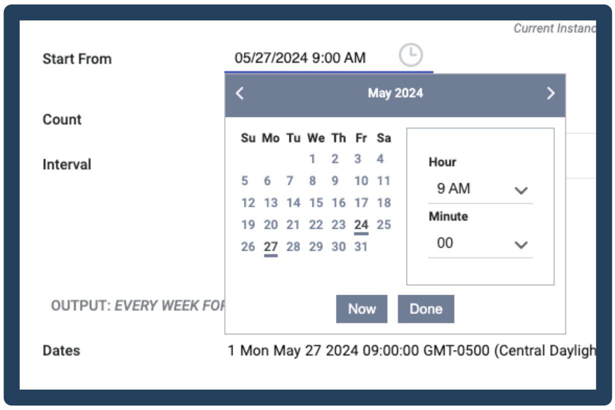
Click "Add New Slot" under the displayed calendar:



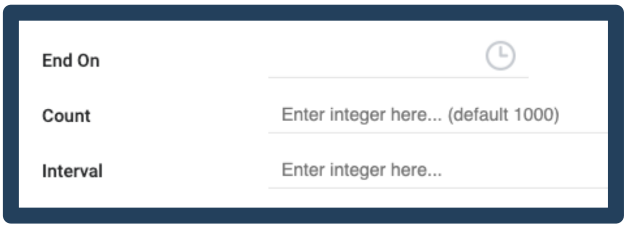
First, choose the **Frequency** you want this appointment slot to repeat:



Next, choose the **Start From** date and time when you want the first appointment slot to occur:



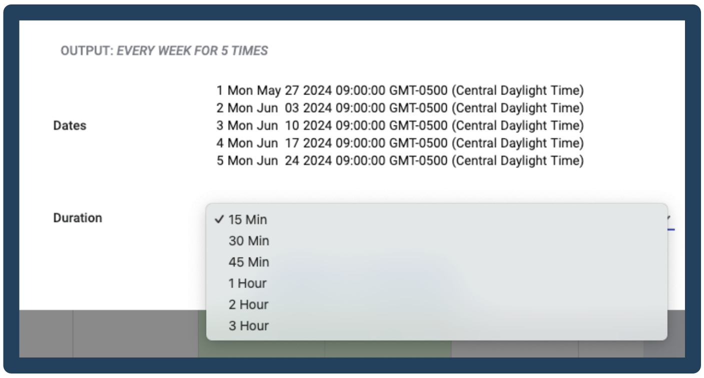
You can choose either an **End On** date when you want the series to end, ***or*** specify the **Count** of appointment slots you want to schedule *(Note: only one of these options can be used, so entering in either an End On date or Count will cause the other field to disappear).*



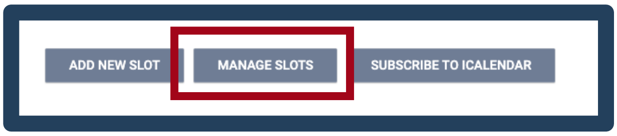
You can also choose an optional **Interval** between each frequency if desired (for example, to repeat the time every 3 days or every 2 weeks, instead of every 1 day or 1 week).

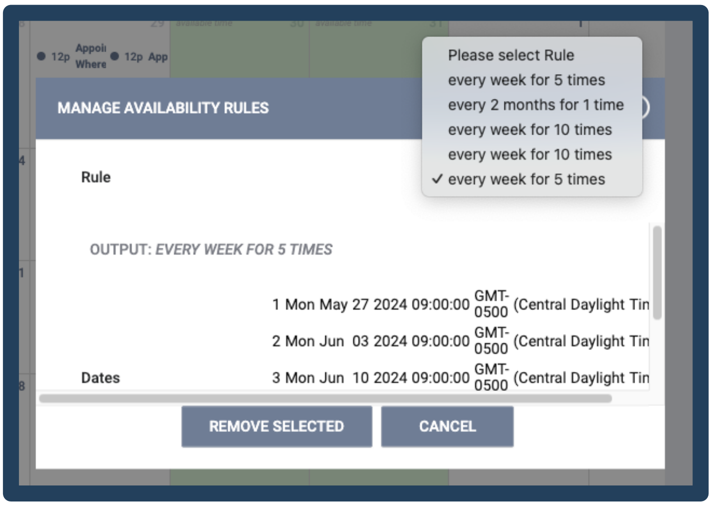
Review the **Output** and **Dates** preview, and then click **Save** to post the new appointment slots. After saving, clients on your care team with **MyConnect**SV accounts will be able to see your availability and directly schedule appointments with you.

You will be notified in your Clarity inbox when a client schedules a new appointment or cancels a previously scheduled appointment.



To remove an existing series of scheduled appointments, click on “Manage Slots”. The choose the series in the dropdown list and click “Remove Selected”.

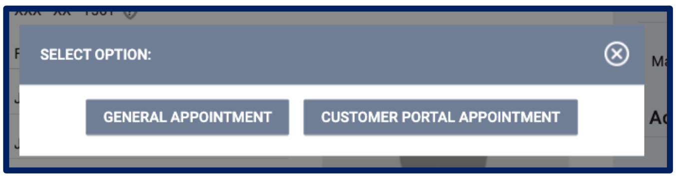




How to Schedule a Client Appointment

Schedule new appointments with clients using the calendar icon on the client’s HMIS profile

If you’d like to schedule an appointment to fill an existing appointment slot, click **Customer Portal Appointment.** If you *don’t* want to schedule an appointment to fill an existing appointment slot, click **General Appointment.**



Complete the fields and click **Save** to save the appointment.

How to Manage or Delete Appointments

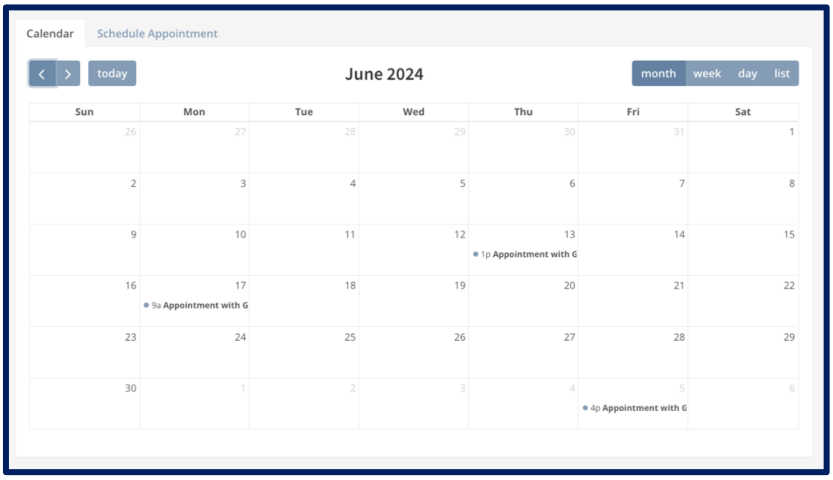
To delete an appointment, select the appointment and click the trashcan icon. Adjustments to the appointment time or date cannot be made once the appointment is set. If adjustments are required, delete the original appointment through the calendar screen, and set a new appointment with the revised appointment details. More information on Clarity’s Calendar features, including calendar integrations, can be found in our *Help Center Calendar article.*

CALENDAR: Client Instructions

Clients can view a listing of all provider appointments scheduled through Clarity in the Calendar screen of their **MyConnect**SV account. Clients can select various views including an appointment list, or view by day, week, or month. Clients can also schedule appointments with care team members based on their posted available time slots.

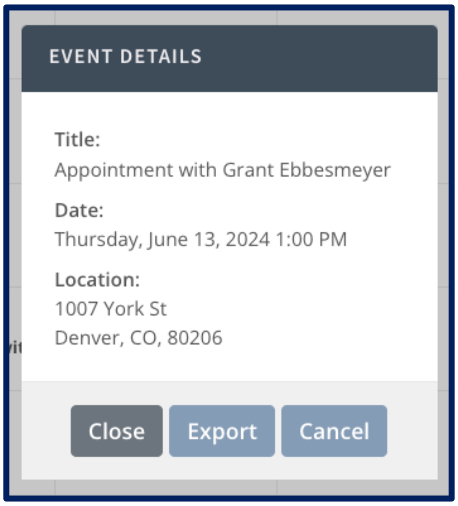
View upcoming appointments: Clients can view upcoming appointments by navigating to **Calendar.**

Clicking on any scheduled appointment will show a pop-up with additional appointment details, as well as the options to **Export** or **Cancel** the appointment.



Exporting appointment information: Clients can click on **Export** to export the appointment information as a calendar file, which can then be added to their phone or other external calendar. The client must agree to the Privacy and Security Warning prior to exporting the appointment information.

Canceling an appointment: Clients can click on **Cancel** to cancel an upcoming appointment. If an appointment is canceled, the Clarity user will be notified with a message.



Use Case & Promising Practices

The Appointment Management feature allows providers and clients to manage appointments in a centralized location and helps ensure that clients have adequate access to appointment information.

- **Explain to clients how they might use this information:** The appointment management feature allows them to view all upcoming appointments with providers & care team members and can help remind them about appointments that they have scheduled with providers.

- If you have posted appointment slots, alert your clients by sending them a message through MyConnectSV so that they can utilize the appointment scheduling functionality to meet with you.