Alaska
SnapAppointment
User Manual

Table of Contents

I. Access, Logging in and Password 3-4

A. Access.....3

B. Logging In 3

C. Password – Initial and Resetting.....4

II. Scheduling.....5–14

A. What's the difference between an Appointment and a Busy Time? 5-6

B. Add a Busy Time.....7-8

C. Add an Appointment.....7-8

D. Quick Availability.....8

E. Edit or Delete an Appointment.....9

F. **Moving and Changing Statuses on Appointments 10-11**

G. Appointment Statuses.....11

H. Customize Availability (Roster) 11-13

I. Print Appointment Notification 14

J. Appointment Changelog.....15

III. Clients 16-17

A. Add a Client.....16

B. Edit or Delete a Client 16-17

1. Access, Logging into & Changing Passwords in SnapAppointment

A. Calendar and User Assignment

1. The difference between a calendar and a user profile and who needs which one.

- Calendars are created for staff members that need to be assigned Appointments. (ET's need calendars, OA's do not need calendars)
- User Profiles are created for staff members that need to be able to schedule/edit/move appointments on a calendar. (ET's and OA's need user profiles)

2. Supervisors will email the following information to Jamie Lang, Jeremy McFarland and Jamie Jones-Burch to request staff member access.
    - Staff members email address
    - Staff members phone number
    - Staff members work location
    - Staff members job classification
    - Does this staff member need a calendar (will appointments be assigned or scheduled for this person?)
    - Is a user profile needed (is this someone who will be scheduling/editing/moving appointments?)
    - Calendars that the staff member needs access to

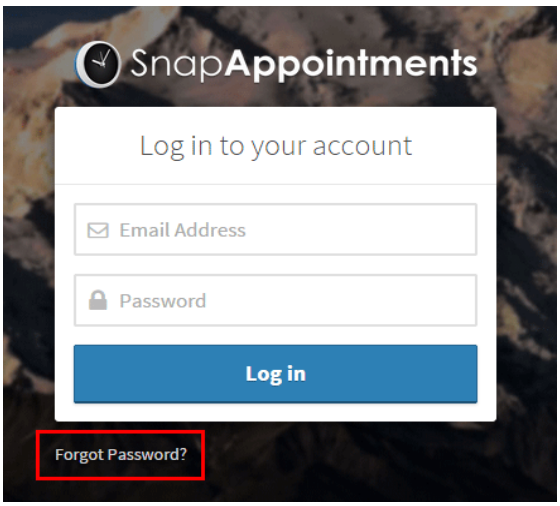
3. User specific profiles will be set up by Headquarters Administrators.

B. Access

1. Alaska SnapAppointment can be accessed from any state computer on the DPA Web under "Quick Links".
2. A user's login will be their SOA email address.

C. Password

1. From the login screen, click the “Forgot Password” link.



2. In the window that pops up, enter the email address you use to sign into your SOA account.
3. Click the button.

4. You will then receive an email that contains a link to reset your password. Follow the link to verify your email, and you will then receive a second email. The second email will contain a temporary password.
5. Log in to your account using your temporary password.
6. Select **“Manage”** at the top of the page displayed.
7. Select **“Staff/Calendars”** from the drop down menu
8. When the calendar assigned to you is displayed, select **“User Account”** from the left side of the page.
9. Click on your name to open the “User Account: details page.
10. In the Details window that slides out, click the button.

11. Enter a new password. The new password must match the password requirements for the account – you will be warned if it does not. Do NOT use the same password that you use for your soa signon or your Outlook account.
12. Finally, click the button.

NOTE: Alaska SnapAppointment is configured similar to the SOA email password requirements. Password must have:

- a minimum of 8 characters
- be case sensitive and include a number and a special character
- user cannot re-use the last twelve (12) passwords
- password expires in 90 days
- User will be locked out for no less than 30 minutes (1/2 hour) after five (5) invalid attempts

2. Scheduling

A. What's the difference between an Appointment and a Busy Time?

- **Appointments** are calendar items that are associated with a specific client and program within the system. An appointment is also stored in a client's history, along with any associated appointment notes.

- **Busy Times** are items on your calendar which also consume time, but aren't associated with a client, e.g. vacations, lunch breaks, blocked and busy time.

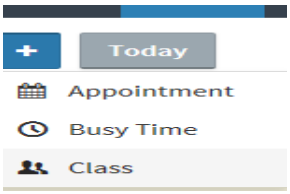
B. Add a Busy Time

Busy Times can be scheduled from the **Dashboard** or the **Calendar**.

a. On the Dashboard click the on the upper right corner of the screen; or
b. Click on **Calendar** in the top menu. This will navigate you to the Calendar page

c. On the Calendar page click the button in the upper left corner, or click directly on the calendar.

d. From the menu that opens up, select **Busy Time**.

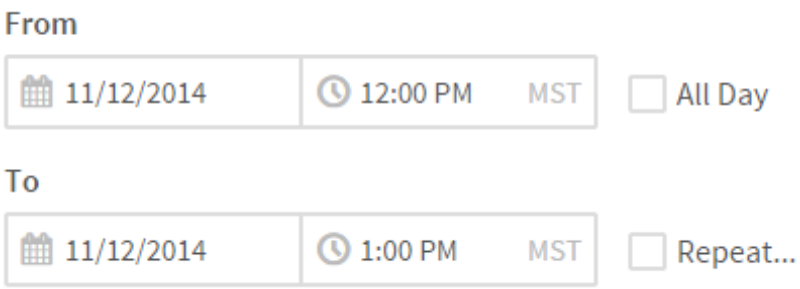


e. Select a **Location** from the drop down menu.

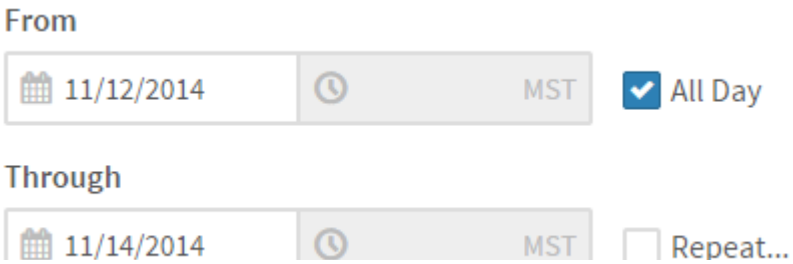
f. Select a calendar from the **Staff/Calendar** menu. (This can be a person or a site calendar)

g. Give the busy time a **Title**, e.g. Blocked, Out, Unavailable, Busy, Lunch, etc.

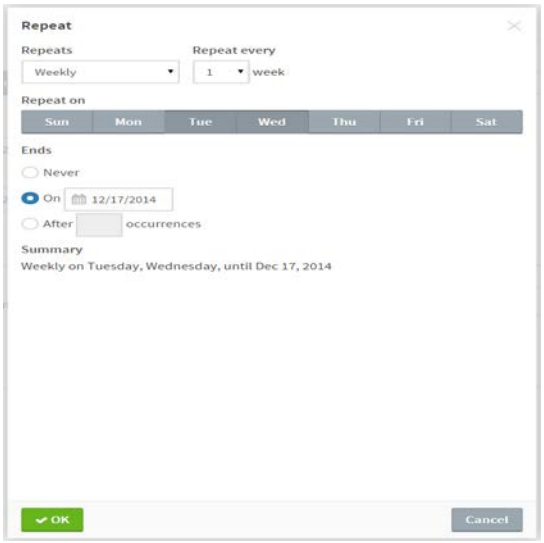
h. Select a start date and time for the busy time in the **From** section, and an end date and time in the **To** section.



i. If the busy time will last the entire day, check the **All Day** checkbox. If **All Day** is checked, start and end times do not need to be provided.



j. Check the **Repeat...** checkbox to make the busy time repeat over a period of time, like once a week or every other Tuesday. Repeating busy times saves you the time and effort it would take to create multiple separate busy times and lets you easily change all events in the series at once. You can see how the busy time will repeat under the **Summary** heading. The maximum amount of time that can be marked "Busy" is unlimited.



k. When selection has been made, click the "OK" button.

l. This will return you to the Busy calendar view.

m. Finally click on the

button and the Busy time will be reserved.

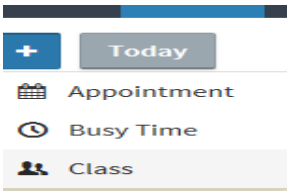
C. Add an Appointment

Appointments can be scheduled from the **Dashboard**, the **Calendar**, or the **Clients** section while viewing client profile.

a. On the Dashboard click the + on the upper right corner of the screen; or
b. Click on **Calendar** in the top menu. This will navigate you to the Calendar page

c. On the Calendar page click the + button in the upper left corner, or click directly on the calendar.

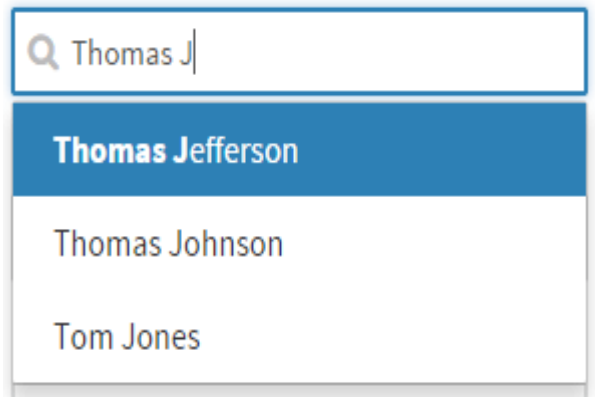
d. From the menu that opens up, select **Appointment**.



e. Select a **Location** from the drop down menu.

f. Select a calendar from the **Staff/Calendar** menu. (This can be a person or a site calendar)
g. Click on **Calendar** in the top menu.
h. Click the button in the upper left corner, or click directly on the calendar.

i. From the menu that opens up, select **Appointment**.
j. Search for a client by their name in the **Name** field, or search for them by phone number using the **Phone** field. Alternatively, enter information for a new client



k. View or enter additional client details in the **Client Details** tab.

l. If adding the appointment to a different location, select the location from the **Location** menu, and the **Staff/Calendar** menu will be automatically updated to list staff/calendars associated with the selected location.
m. Select a calendar from the **Staff/Calendar** menu.

n. Select a program (or multiple programs) from the **Program** menu.

o. Select a date and time for the appointment, or click the Quick Availability link and select a time from the **Quick Availability** list.

p. Fill out any relevant custom appointment fields.

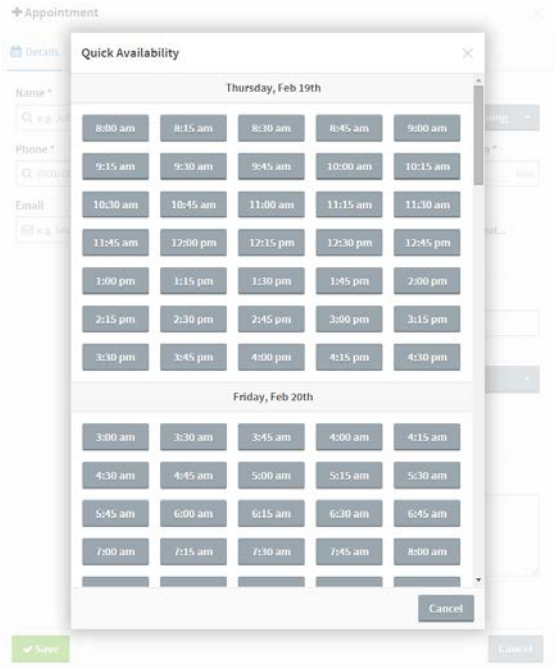
q. If desired, add **Appointment Notes**. These notes are kept internally and are not visible to the client.

r. Finally, click the

button.

D. Quick Availability

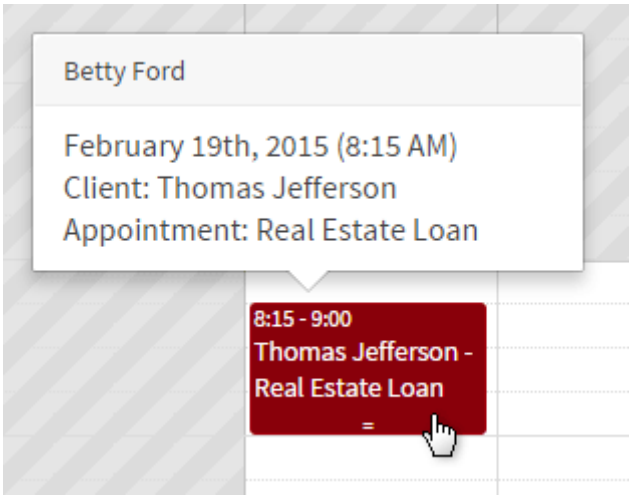
The Quick Availability can be accessed when adding an Appointment, it is located next to the Date & Time fields in the scheduling window. It displays a list of upcoming available times.



Note: the quick availability will find the next available appointment. If appointments are moved off of the Intake/Maintenance/Lobby calendars prior to the actual time of the interview, the quick availability will identify that slot as the next appointment.

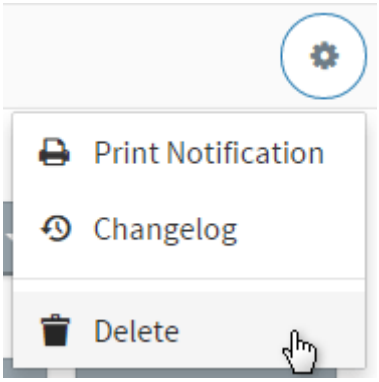
E. Edit or Delete an Appointment

a. An Appointment can be edited or deleted from either the Dashboard or Calendar.
b. On the Dashboard select an upcoming appointment from the “Upcoming” list; or
c. Click on **Calendar** in the top menu.
d. Once in a Calendar, Click on an appointment.



e. Make any necessary changes to the appointment details.

f. If deleting the appointment, click in the upper right corner of the window. Then, select **Delete** from the menu that opens.



g. Finally, click the **Delete** button.

F. Moving & Changing Status of Appointment

Note: If Appointments are moved off of the Office/Site Intake, Maintenance, Lobby Calendars prior to the time of the actual interview, the appointment slot will appear as an available time slot for an interview to be scheduled. Staff should move the client appointment from the office/site calendar to their personal calendar once the staff member has direct contact with the client and is in the interview process. If a client is a "no show" mark it with the correct status and leave it on the office/site calendar.

a. An Appointment can be moved and status changed from the Dashboard, Calendar or Clients pages.
b. **DASHBOARD** - On the Dashboard select an upcoming appointment from the "Upcoming" list and follow directions from h-p in this section; or
c. **CALENDAR** - Click on **Calendar** in the top menu.
d. Once in a Calendar, click on the appointment for the client to be interviewed and follow directions from h-p in this section; or
e. **CLIENTS** - Click on Clients in the top menu.
f. Once in the Client page, type the client name in the search box and select the correct client from the client list on the left hand side of the page.
g. The appointment details page will load from Dashboard, Calendar and Client pages.
h. To change the appointment within a site/office, click on the Staff/Calendar and assign the appointment to yourself.
i. To change an appointment from another site/office, in the upper right hand corner select the office where the appointment is currently scheduled. Using instructions a-c in this section, find and click on the identified appointment that needs to be moved/assigned.
j. Select the **Location** from the drop down menu. Change the Location to the site that is doing the scheduled interview.
k. Select a calendar from the **Staff/Calendar** menu, and assign it to the correct site/office/person calendar.
l. To change the Status, click on the Status button and select the appropriate option based on the appointment status color listed in Section G.
m. Fill out any relevant custom appointment fields.
n. If desired, add **Appointment Notes**. These notes are kept internally and are not visible to the client.
o. Finally, click the

button

G. Appointment Statuses

Appointment statuses provide a method of tracking the status to an appointment. There are currently multiple options and each one corresponds to the color code menu listed below. Assigning the correct status is critical both for prioritizing the office work, and getting accurate data in reports.

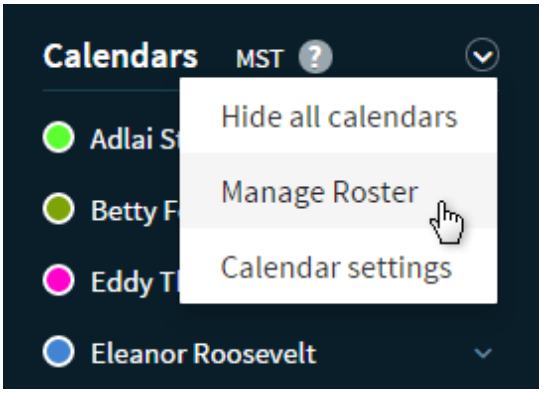
Green - **Scheduled Appointment**	This is the default color when an appointment is finalized in the system.
Orange - **Waiting for an Interview**	This indicates the client is waiting for either a scheduled interview or is in the lobby for a walk-in interview.
Red - **No Show**	This indicates that a client was not available for a scheduled interview, or left the lobby for a walk-in interview.
Blue - **Completed Interview**	This indicates the interview has been completed.
Fuchsia - **Waiting over 30 Minutes**	Indicates a client has been waiting for their interview for over 30 minutes. This will automatically update.

H. Customize Availability (Roster)

The roster feature allows you to change the start/end times for your calendar on specific dates. (If this needs be adjusted for other staff or site/office calendars, contact an Administrator) For example, an employee who is normally unavailable on Thursdays can be made available for just Thursday, February 5. An Administrator can modify multiple calendars at once using the multi-select dropdown.

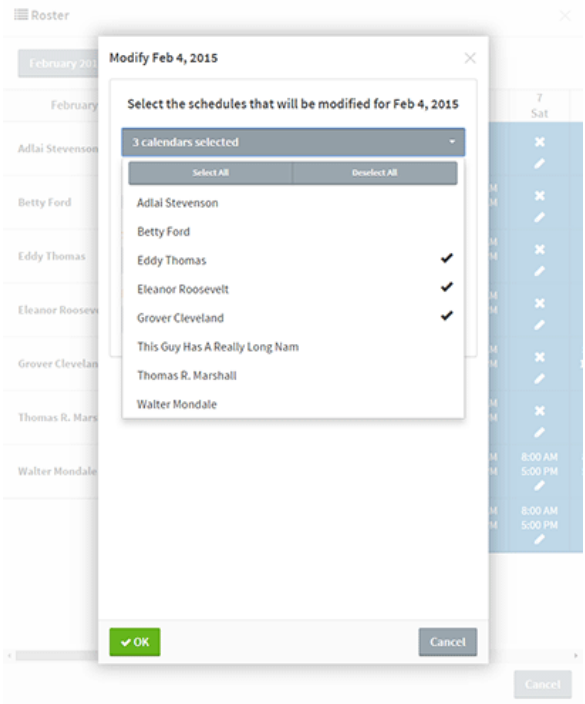
a. Click on **Calendar** in the top menu.

b. Click on the arrow next to the **Calendars** heading in the side nav. Then, select **Manage Roster**.

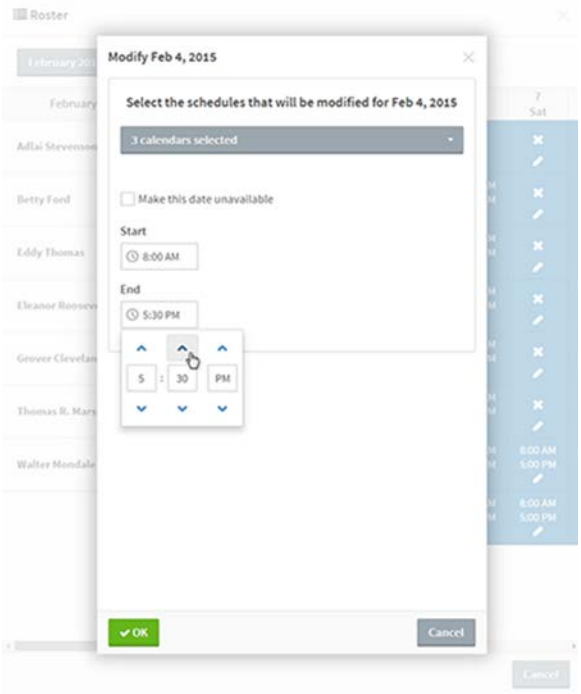


c. In the window that pops up, select a date in the row for the relevant staff member. At this time the only access to a staff member's roster is by the staff member themselves, and/or an Administrator within Field Services.

d. A smaller window will open. You can also select additional calendars, allowing multiple schedules to be customized at once.



e. Choose a new start and end time, or check the "Make this date unavailable" checkbox to make the date unavailable for the selected staff member(s).

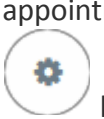


6. Click the button.

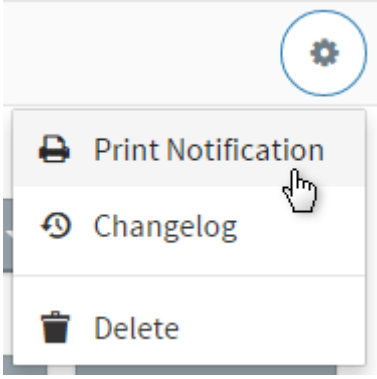
7. Modified dates will be highlighted in yellow.

I. Print Appointment Notification

a. Click on the appointment you want to print the notification for.

b. Click on the  button in the upper right corner.

c. Select **Print Notification** from the menu.

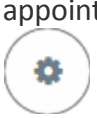


d. A preview of the notification pops up. After confirming the information, click the button.

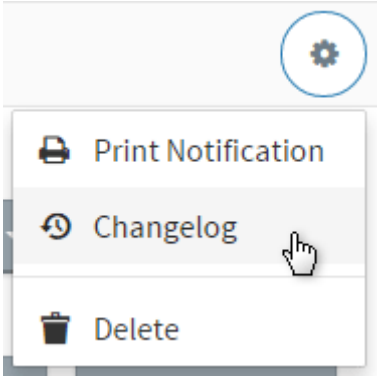
J. Appointment Changelog

An appointment's changelog allows you to view a list of all changes made to an appointment, when those changes were made, and which user made the changes. To view an appointment's changelog:

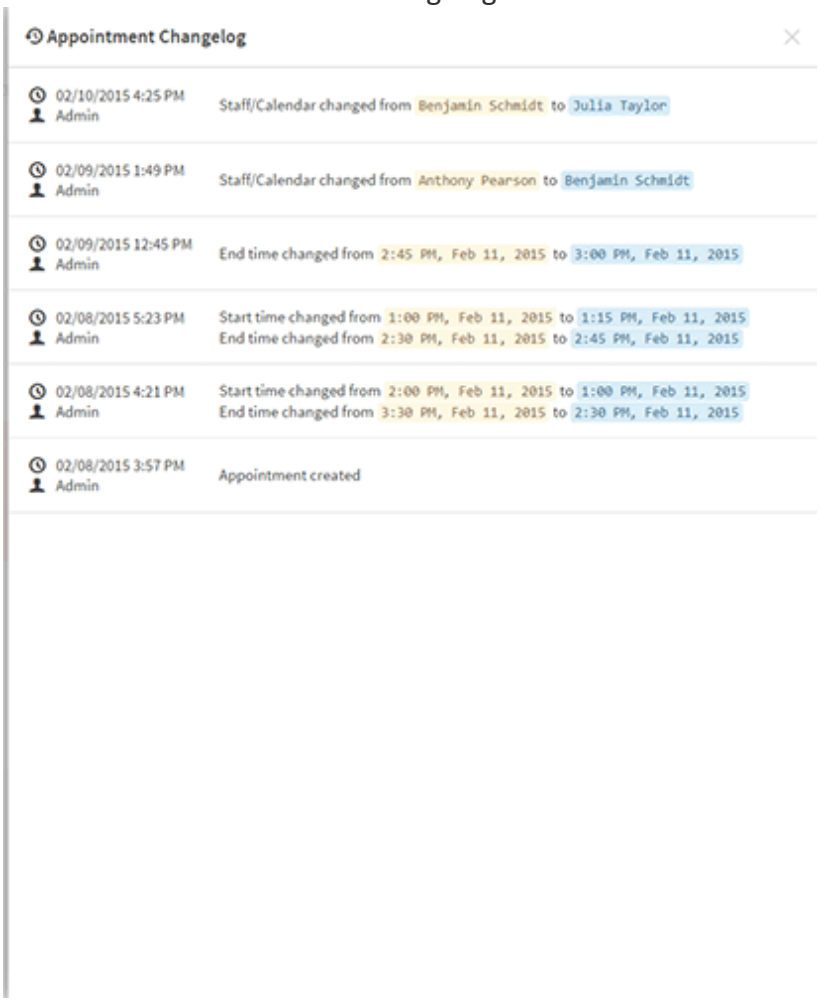
a. Click on the appointment you want to view the changelog for.

b. Click on the  button in the upper right corner.

c. Select **Changelog** from the menu.



d. A new window with the changelog slides out.



I. Clients

A. Add a Client

A client can either be added from the **Clients** section or on the fly, while creating a new appointment.

1. To add a client in the Clients sections, click on **Clients** in the top menu.
2. Click the button in the upper left corner.
3. Complete all desired fields on the **Client Details** tab. Fields that have an asterisk (*) next to their label are required**.** NOTE: When entering client names enter the first name and then last name. Example: John Smith.
4. Finally, click the

button.

5. To add a client on the fly, click on the calendar space you want to add an appointment or via the on the Calendar page. You will be in the +Appointment page.
6. Click on Client Details, you will be able to enter client information. Fields that have an asterisk (*) next to their label are required. Complete entry client details and complete the appointment scheduling information.
7. Then click the

button.

B. Edit or Delete a Client

Client details can be edited from the **Clients** section or on the fly, while creating a new appointment.

1. Click on **Clients** in the top menu.
2. Browse the list for the client, or search for a client by name. Then, click on a client name in the list.

3. Edit client information on the **Client Details** tab. Fields that have an asterisk (*) next to their label are required.
4. To manage client appointments, click on the **Appointments** tab. Click the button to add an appointment for the selected client. Clicking the "Upcoming" button will display a list of upcoming appointments for the selected client. Clicking the "History" button will display a list of past appointments.

5. Click the

button to save any changes to the client details.

6. If deleting the client, click in the upper right corner of the window. Then, select **Delete** from the menu that opens, and confirm the deletion. The client record will be permanently deleted and cannot be recovered.