Scheduling Table of Contents:

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ATS—Scheduling Overview

ATS allows you to control your daily schedule. You are able to build appointments, in varying time frames, for different reasons. Helping to maximize your time and efficiency. In the following pages, this doc will show you how to schedule one appointment to setting your schedule for the week or longer.

Site Info Configuration:

Begin by going to the ADMIN tab—>Site Info—>Opt (2) tab. These are the schedule specific option for the database.
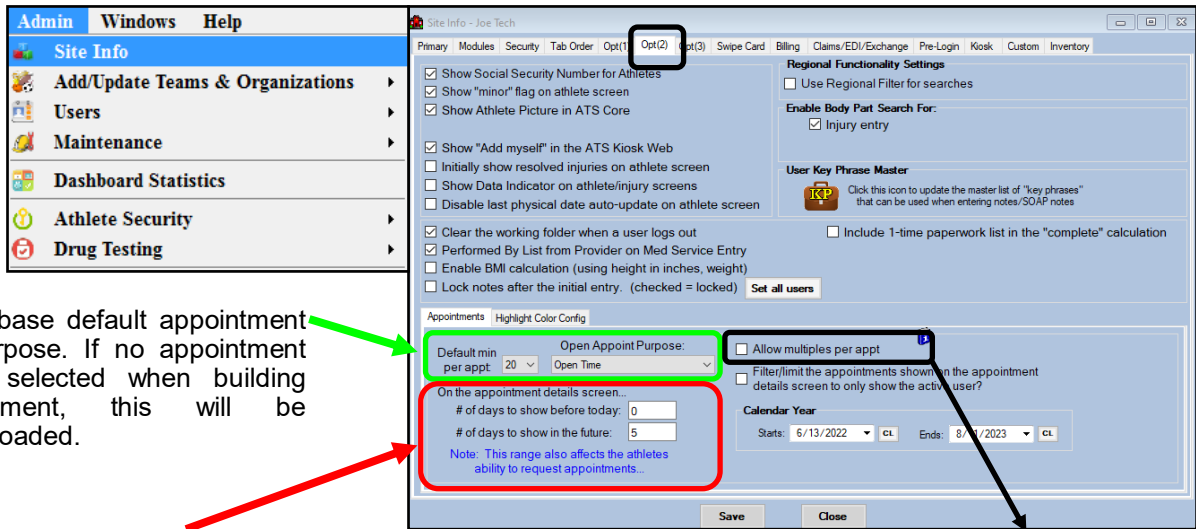
Set your database default appointment time, and purpose. If no appointment purpose/time selected when building the appointment, this will be automatically loaded.

The days before and future affects how many days you will see on the monthly and daily appointment screens.

By selecting multiples per appt; that will allow you the ability to post multiple time slots in one appointment. If not checked, you will need to post individual appointments, versus 1 appointment with 2, or 3 or 4 time slots.

Color Coding Appointments:

ATS allows you to color code the appointments you have available in ATS. This can help differentiate between purposes of appointments, staff and the other selections available on the screen.
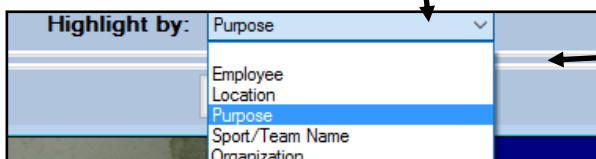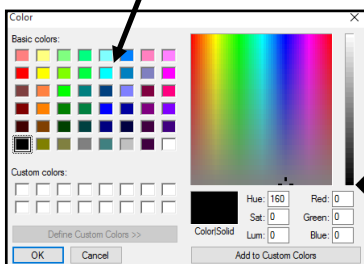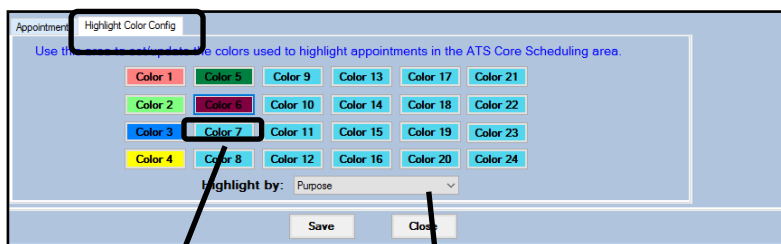
The Highlight Color Config tab allows you to select different colors for the how the appointments appear on the staff screens. Color coding does appear in the order and affects the screens/staff in the order they appear. Purpose 5 in your dropdown list= color 5 on this screen.

ATS—Scheduling Overview

Site Info Configuration:

The next step is to make sure your Calendar Year is up to date. While still in the OPT 2 tab set your **Calendar Year**. This area needs to be current for the appointments to be visible to the athletes. This calendar will need to be kept current every year; it does not auto-update.

While in Site Info, ensure that the time zone is correct for the location you are. 0 is default for eastern time, make sure you go backwards for CST(-1), MST(-2), PST(-3).


The time zone is important later when you restrict appointment times, they are not being blocked before they should be. This also can affect the time shown on reports.

If you are having troubles with athletes viewing appointment times or they just aren't working, double check the calendar is up to date/ up-to-date for the current year, and your time zone is correct for where you are.

ATS—Scheduling Overview

TOP

Site Info Configuration:

While still in Site Info, go to **Athlete Portal**. Under the Athlete Appointments section, you can decide when to make appointments no longer available to athletes.
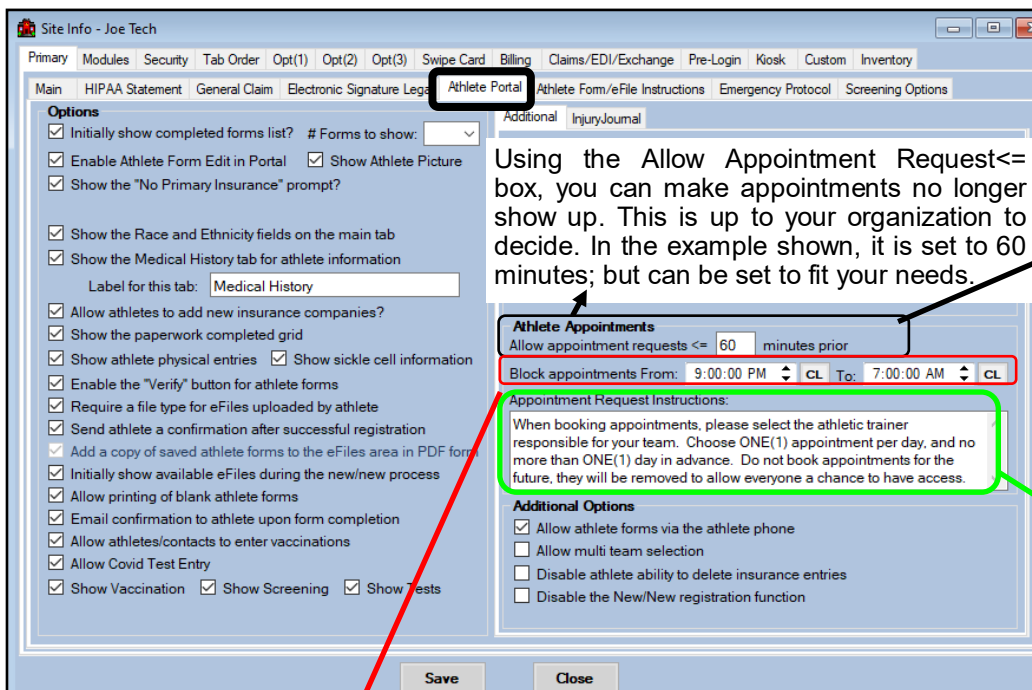

That means that if an athlete attempts to book an appointment at 1:05pm for 2pm, the appointment would no longer be there. They would have to look for the next available slot.

Using the Allow Appointment Request <= box, you can make appointments no longer show up. This is up to your organization to decide. In the example shown, it is set to 60 minutes; but can be set to fit your needs.

Instructions: allows you space to leave the athlete a message on their portal when booking appointments. This can be standards your organization wants; or instructions on how to book appointments.

Block Appointments From: allows you to decide when you do not want appointments to be available to be booked by athletes. This is used typically over night, so they are not able to book an appointment at 3am for 8am the next morning. The hours can be set how you see fit.

Site Info— Module Access:

Before exiting Site Info, ensure that your athletes have the ability to see the Appointment Request feature. Go to the modules tab, and look in the Athlete portal portion of the module functions. Ensure that the Request Appointment and Schedule boxes are selected.
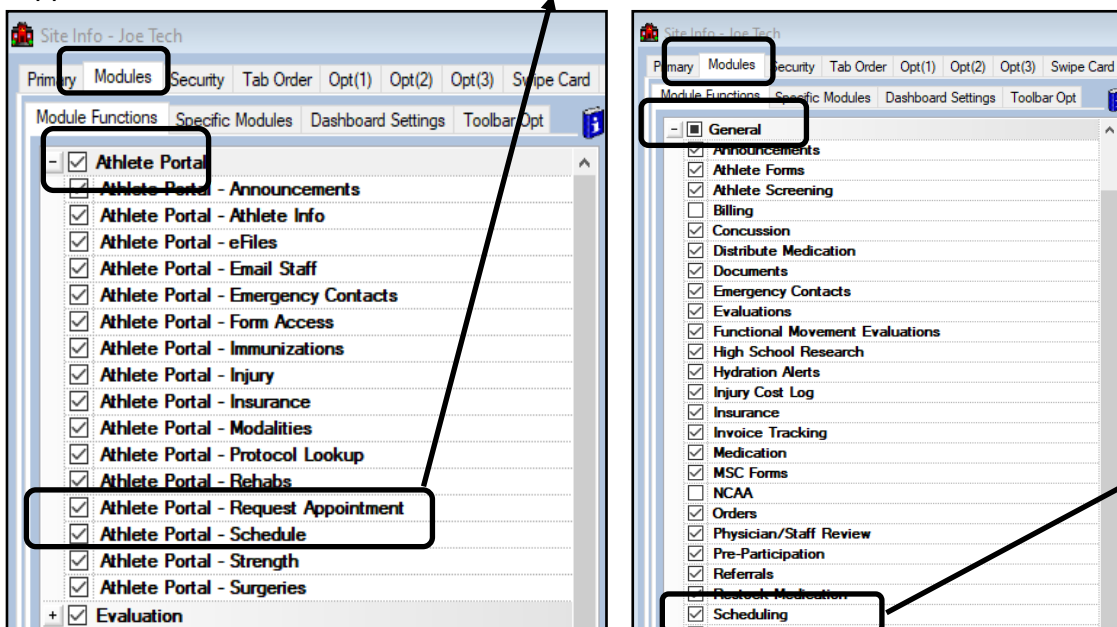
Also ensure that the scheduling module is turned on for the staff.

Without the scheduling module checked off here. It will not show on the main page.

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User Info Configuration:

The next step is to ensure that the user profiles are set up, to allow the individual user to access the scheduling as well as accept appointments and other settings.

To ensure or turn on the scheduling module go through the ADMIN tab—> Users—> search user or select my user. Then select the modules tab. If this is an AT, ensure they have read/write access for scheduling.

For more details on setting up user/staff accounts see the User Configuration doc
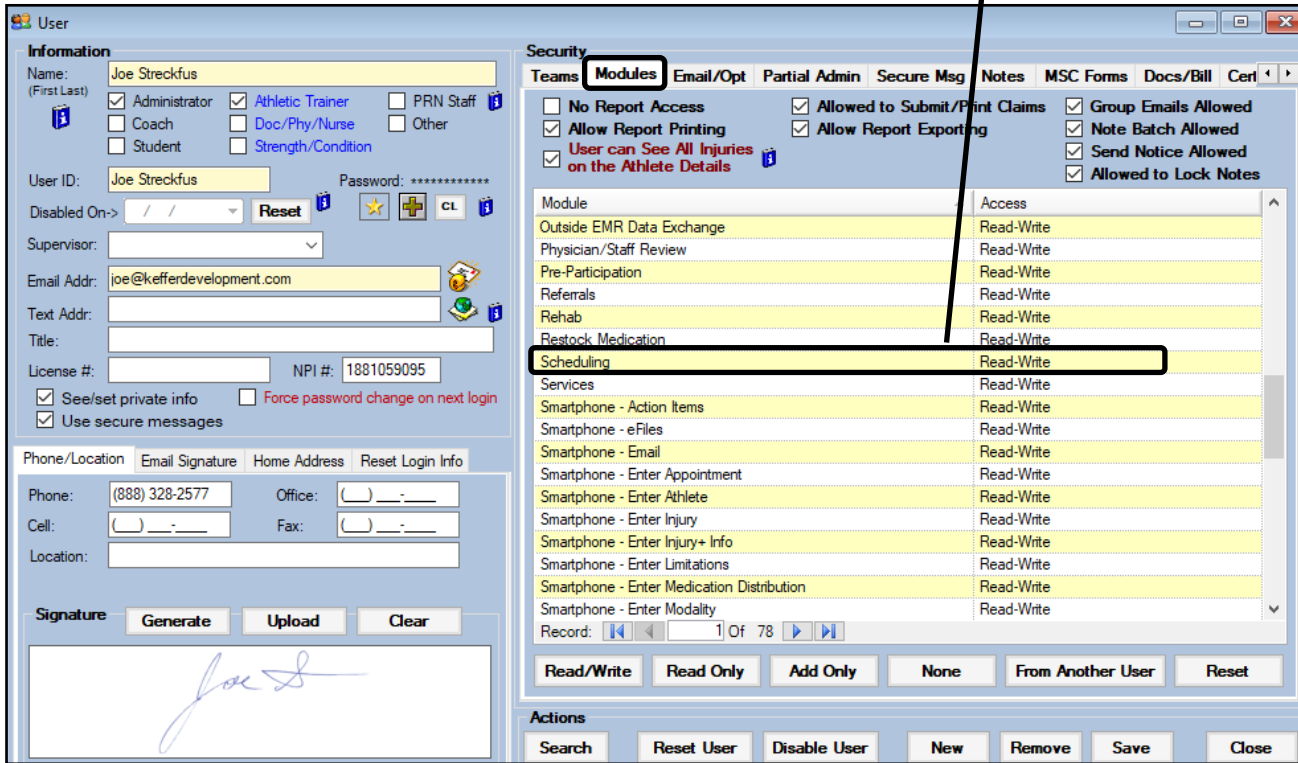
While you are in the user profile, next ensure the auto-accept appointments has been enabled in the user profile. This will allow you to see the athlete's name on the appointment they signed up for. Once the user profile is open go to the Email/Opt tab and select the auto-accept box. **If this is not done, the athletes will not show on the schedule, and will be manually entered by the staff, until the appointment is manually booked it will remain on the schedule for others book.**
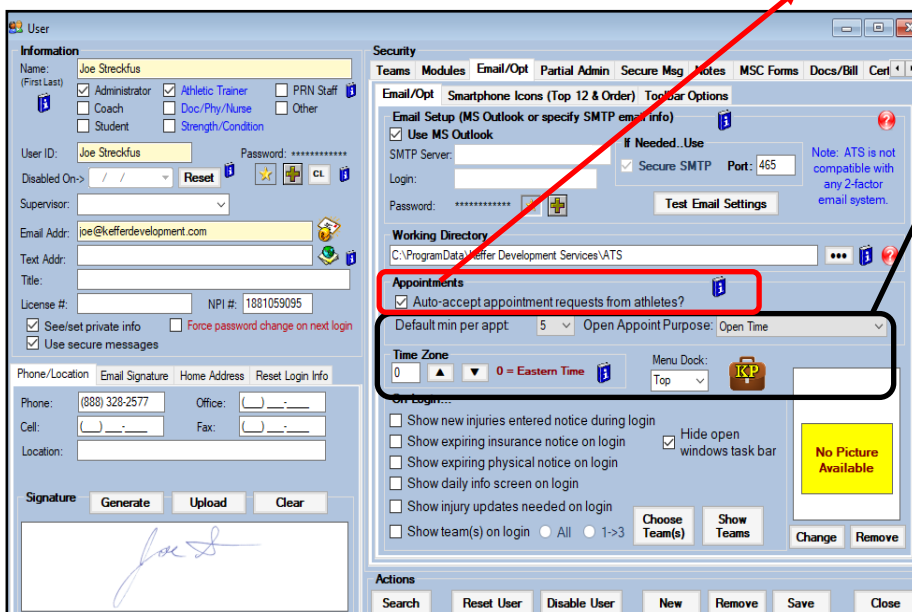
While in the user profile. If it has not been done at setup, ensure that they have a default appointment time, as well as a purpose. Also verify the time zone matches what is in Site Info.

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Dropdown List Appointments:

You must also make sure that your appointment types that you want to be available on the athlete portal have been marked as "athlete see". As others this is an administrative feature. If you do not have access to the maintenance list, see your system admin.

If you have athletes that cannot see appointments you have posted, check that appointment type is visible/athlete see!!

Go to ADMIN—>Maintenance—>dropdown/pop up list—>update dropdown/pop up lists. When the maintenance screen opens, you will need to select ApptPurpose from the popup area dropdown.
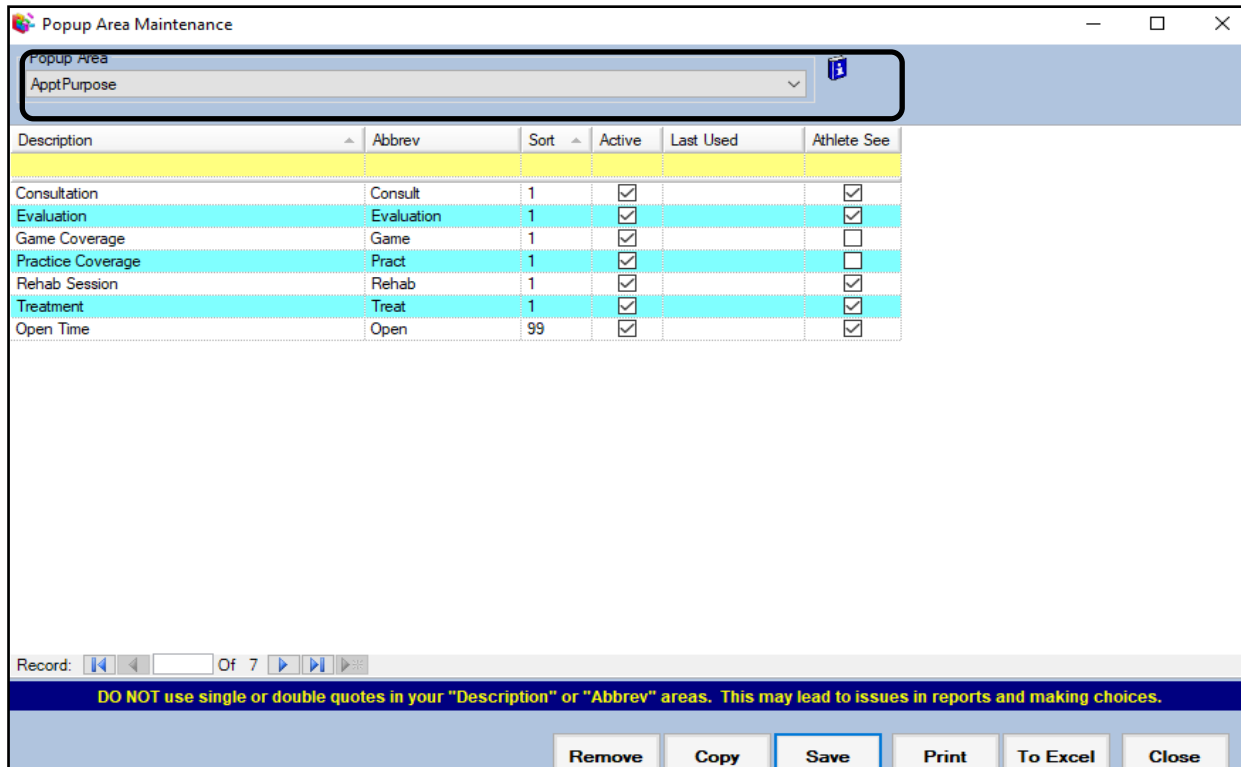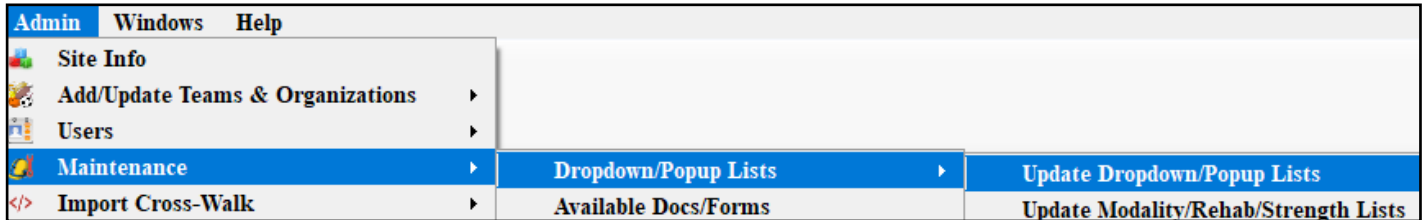
Customize the appointment list to fit your needs. Add appointment purposes that you would like to have, like you add other items to the maintenance area. As other areas, if you do not wish to have an option you can inactivate it in lieu of deleting it, that way historical records are preserved. For more information on the dropdown lists please view the customizing dropdown help doc.

Select the appointments purposes you would like your athletes to see on your schedule. This will affect all appointments and staff in your database. If you have appointments that are private, game coverage, other Athlete Dr. Appointments, you can leave them unchecked. That keeps the Athlete from seeing it on your schedule.

ATS—Scheduling Overview

Make an Appointment:

After getting the administrative functions set. You are ready to begin building your schedule with one of the many different appointment tools.
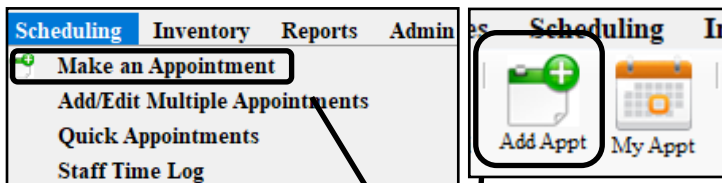
The Make an appointment or Add Appt icon is the way to create an individual appointment time slot, and many other features. Adding athletes to the appointment or recurring. More explanation below

Number of athletes you want to have in the appointment.

Allows you to change the appointment time intervals/length of that appointment.
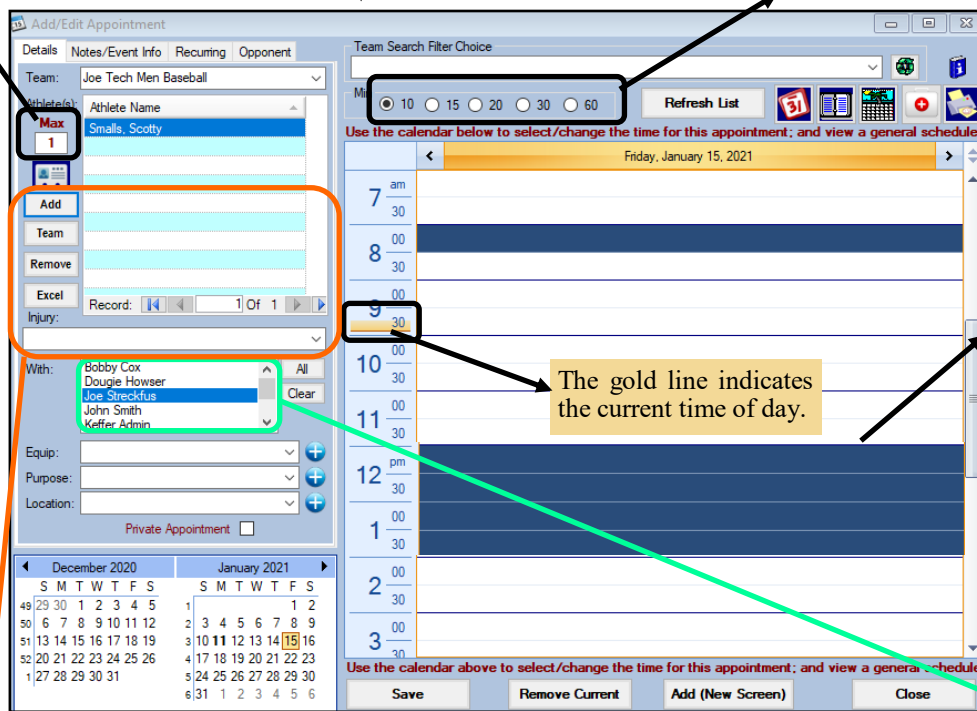
The blue line indicates the time of the appointment you are creating.

The gold line indicates the current time of day.

To make an appointment span several time spots, use the CTRL button and click and drag to the desired time.

These sections allow you to add an athlete to the appointment using the ADD button. Add the team if you choose, remove the person from the appointment time. If you select an athlete you can choose the injury they are coming for as well. You can also set how many Athletes per appointment can be booked. Putting a number in larger than 1 in the MAX allows multiple athletes to book.

The appointment defaults to the user profile logged into ATS. You are able to select from the list, if you are scheduling with/for someone else.

The Printer, will print the schedule from the view you have open, daily, weekly, monthly.
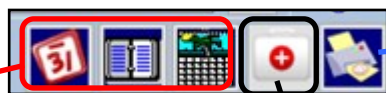
These buttons allow you to scroll between calendar views. The red calendar shows the Daily screen as shown above. The blue book, shows you a breakdown of the weeks appointments. The Calendar shows you your monthly appointments.

The injury bag will open the injury for the athlete. It will only work if you have chosen an athlete and chosen an injury when creating the appointment; in the above steps.

Make an Appointment:

Using CTRL and dragging over the dates will allow you to block multiple days, ex. Vacation or long road trip

The remaining tabs of the appointment screen allow you to put in any notes or other event information. Set as a recurring appointment, daily, weekly, monthly, yearly appointments (ex. Weekly athletic department meetings), or opponent information. That is where you build the online sports schedule (more on following pages).

ATS—Scheduling Overview

Adding or Editing Multiple Appointments:

The ADD/EDIT multiple appointments, allows you the flexibility of seeing appointments, and being to add or edit those corresponding appointments. You also have the ability to add multiple appointments at one time, you can also set the recurrence as before by using the recurrence tab.

You are able to filter, and see all your appointments, specific athlete or team appointments.

Dates you wish to view or set recurring appointments for.
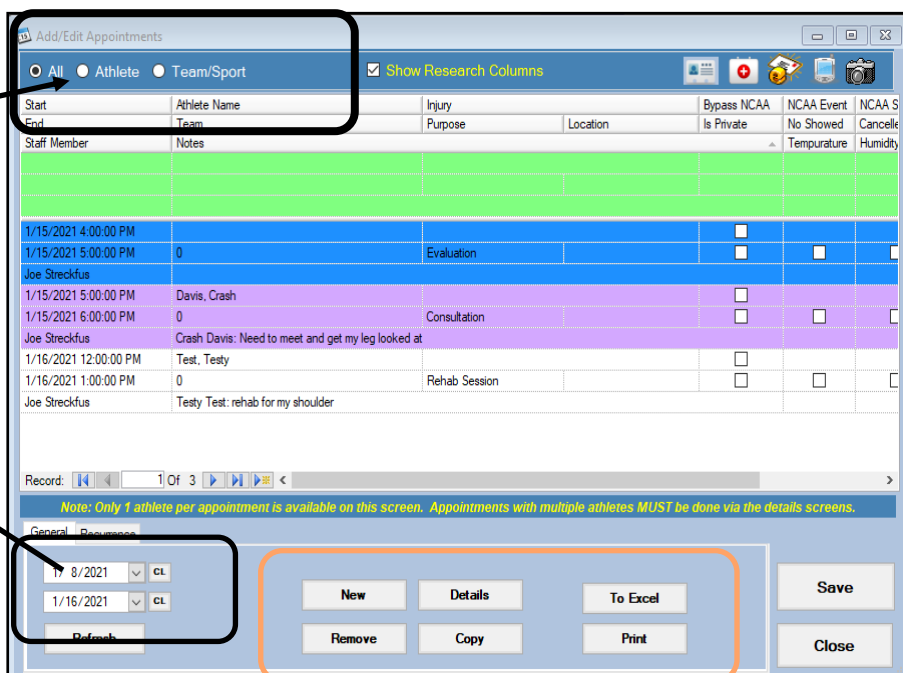
Use the NEW button to add new appointments. Details after highlighting the appointment to see the details of the appointment, the athlete note they sent.

You can copy the appointment, or remove the appointment.

You can print the screen/appointments or export to excel.

Setting Recurring Appointment:
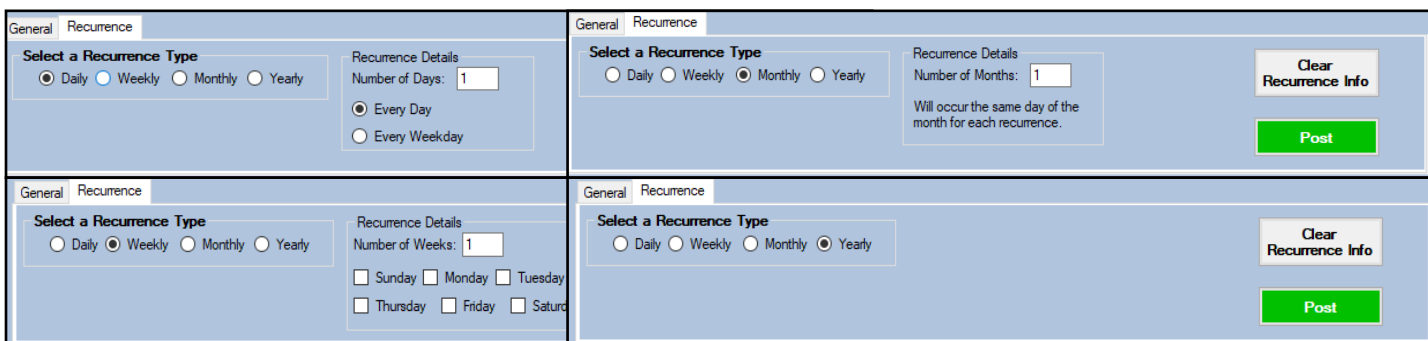
You are able to build a recurring appointment in ATS. If you have a long term rehab that will be coming at the same time, or a weekly meeting or any combination of those. To build a recurring appointment; select either daily, weekly, monthly, or yearly for the recurrence. Fill in appropriate details for the recurrence, and make sure the information is set in the screen above.

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Building a sports schedule, required information to post online:

From the details screen, select the team the game/event is for. Make sure to select the appropriate user.
Select a purpose, location is optional.

Go to the Note/event/info and fill in the NCAA information, or select bypass

Under the opponent tab, fill in the information about the event. If you want to post it online, check the box. Filling in the address information will allow the online schedule to generate a map of the event.

Select the time of the appointment, use CTRL and click and drag to select a larger amount of time.

ATS—Scheduling Overview

Quick Appointments:
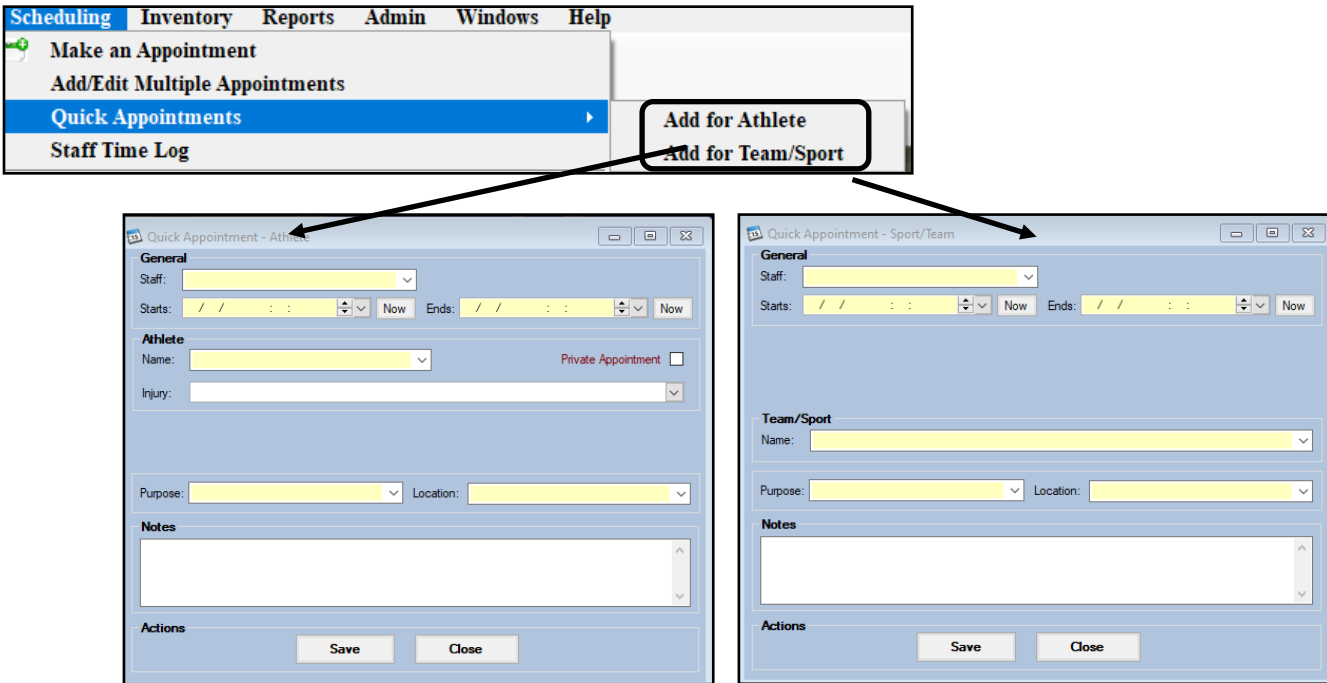
Quick add allows you to build an appointment with the minimal details. Use the athlete add, or team add to build your appointment. You can customize by using the add/edit screen to add more details, if necessary.

Daily Appointments:

Displays the appointments scheduled for you organization. From here, you can see all the injury details, purpose, location, whether they showed, cancelled, or completed. If it is another type of appointment there are places to record other details. The notes the athlete or staff member left are also available. You are also able to filter by team or organization if you choose. Show all button will show all schedule appointments, my appointments will limit it to yours.
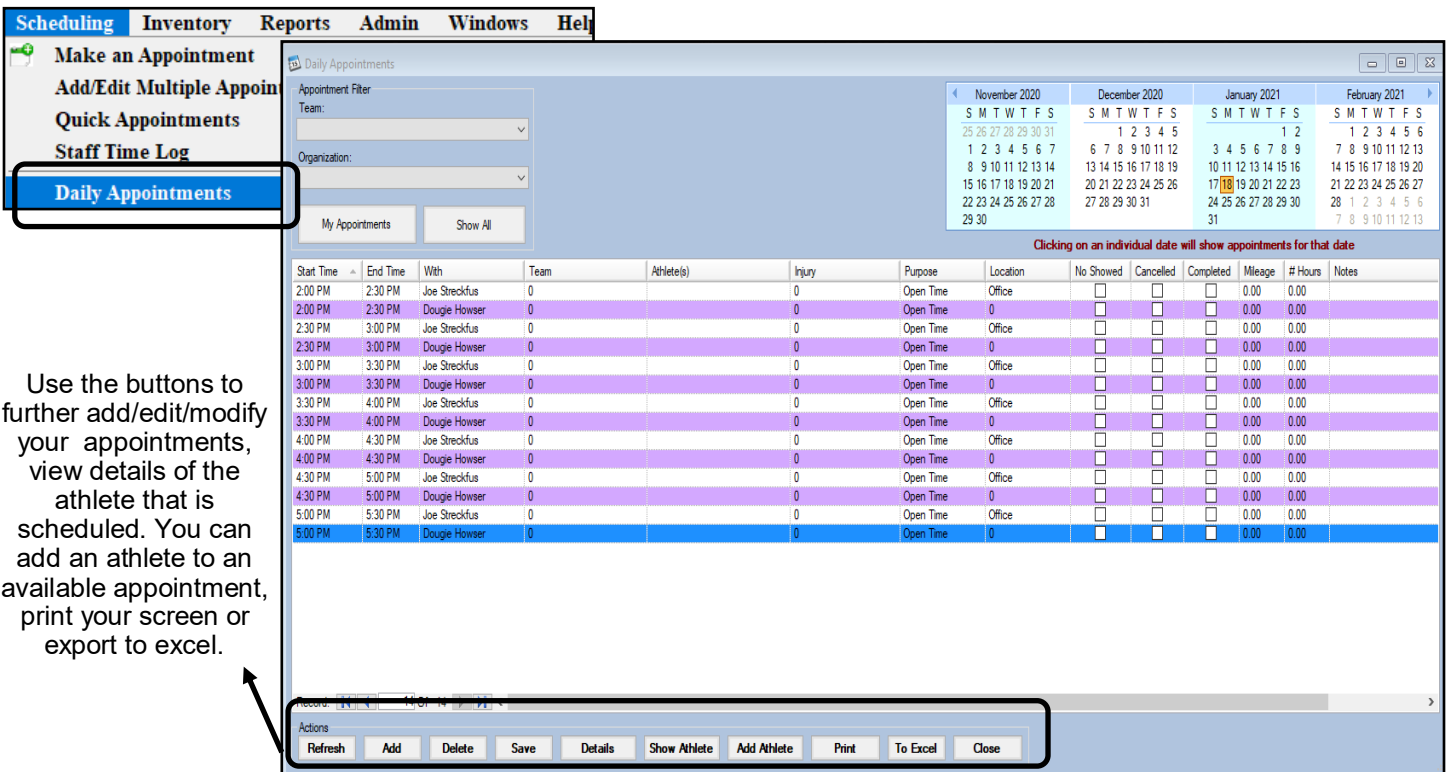
Use the buttons to further add/edit/modify your appointments, view details of the athlete that is scheduled. You can add an athlete to an available appointment, print your screen or export to excel.

ATS—Scheduling Overview

My Appointments:

To view your scheduled and available appointment times, use the menu or the icon shown below to access your appointments. Use the associated icons in the page to make adjustments or edits to the appointment, view the week, or month.

View the daily, weekly or monthly appointments.

View the athlete profile.

If an injury is specified, this button will take you directly to the injury screen.

Add Athlete— allows you to add an athlete to an appointment.

Remove Athlete— allows you to remove the selected athlete on the appointment, but will make the spot available again for other athletes to book.

New Appt— allows you to add an appointment from this screen.

View/Edit— allows you to see details or edit the appointment.

Delete— will delete the appointment availability.

Refresh— will reload the screen, refreshing any appointments that have been booked, deleted, or cleared.

View Staff Schedules:

Using this tab allows you to view your schedule, as well as all of the other users in your database.

Choose the staff member you want to view the schedule for.

Once you select the staff you will see a screen that looks like much of the other appointment screens. The buttons contained here function the same as other screens.

You are able to select different staff members by utilizing the drop down window.

ATS—Scheduling Overview

Athlete Appointments:

Athlete appointments allows you to see all of the scheduled, and previously scheduled appointments with that athlete.

The athlete appointments screen will show you all of the appointments the athlete has had, or has booked currently. This screen shows you all appointments for that athlete and allows you to edit if necessary.

The buttons at the bottom of the page function the same as in other screens.

Team appointments, Equipment, Location Appointments will look similar to this screen, except will use those filters to pull the specifics for those appointments.

ATS—Scheduling Overview

Other Appointment Features:

From the my appointment screen make sure to select the appointment you want to edit, then utilize the View/Edit button.

This will take you to the add/edit appointment screen. You can then move the appointment to a different day by click and dragging to one of the calendar days.

You can expand the time of the appointment by getting the double ↕ on that appointment and dragging earlier or later. It will not overwrite the current appointment instead bump them like there is more than 1 appointment for that time
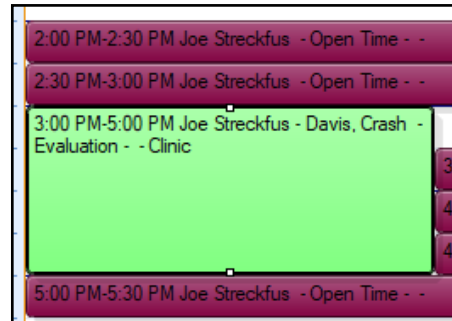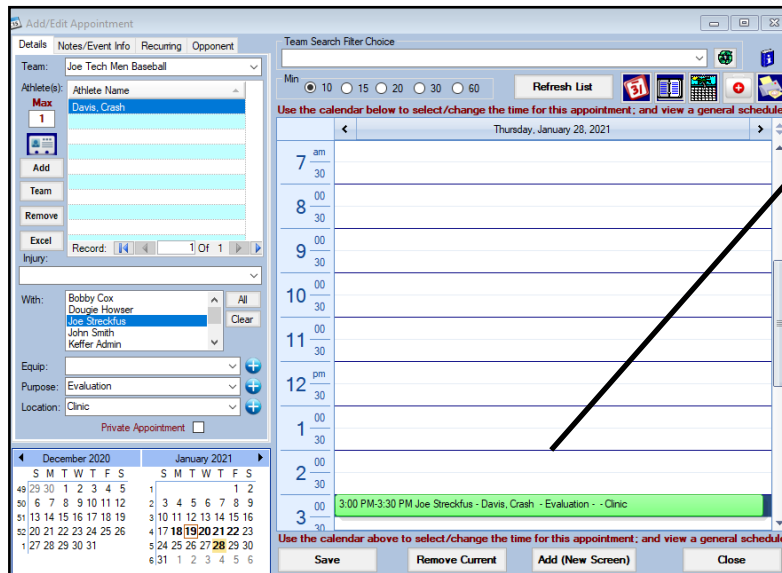
Selecting an appointment from one day/time and dragging it to another day will copy that appointment that it was selected for.

It then will show that slot as an open time. You will have to recreate an appointment in that area if you want it to have it available.
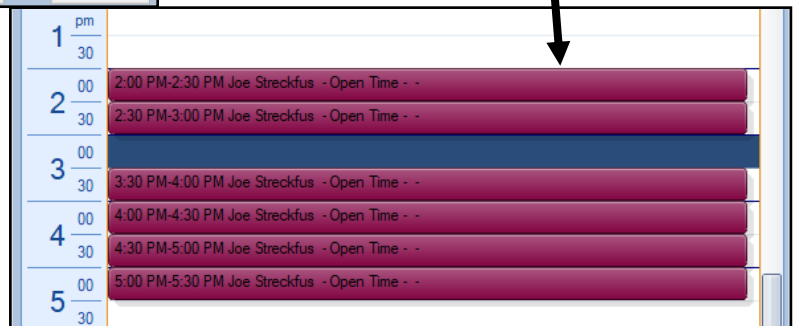
You are able to import you schedule from Outlook, Google, or excel. This feature does not "Auto Sync". Instead offers a one time import of your calendar into ATS. For more information on that, please see the help docs for scheduling. For Excel visit help page and search Scheduling, there is a zip file that has a template and instructions with it. For Outlook click the hyper link, for ical/Google click the hyper link.

Scheduling Staff/Equipment Availability:

Staff/Equipment Availability is the bulk appointment scheduling feature in ATS. This allows you to see single or multiple dates, variety of times and post the availability for athletes to sign up for. You can use this feature for yourself, staff members or equipment.

For complete details on using the staff/equipment availability screen please see the Scheduling Availability help doc
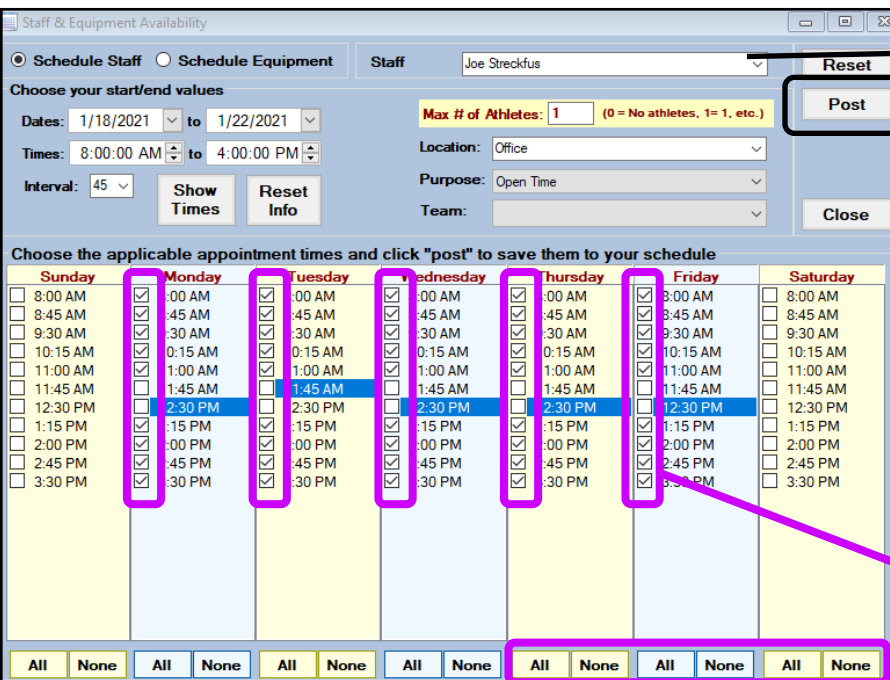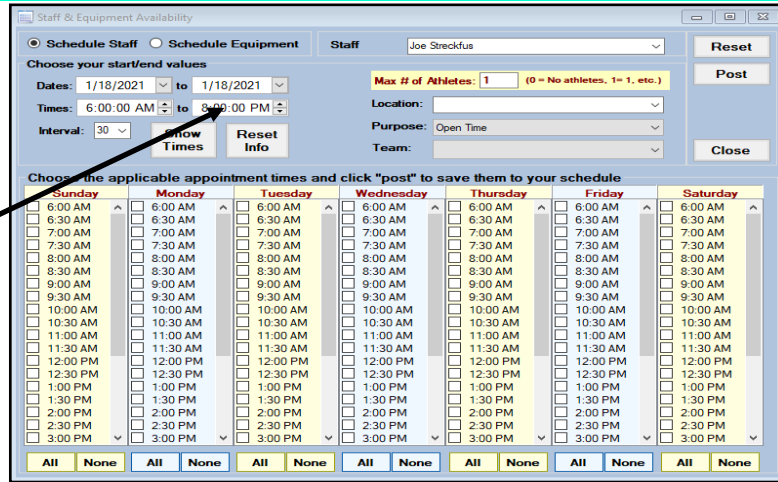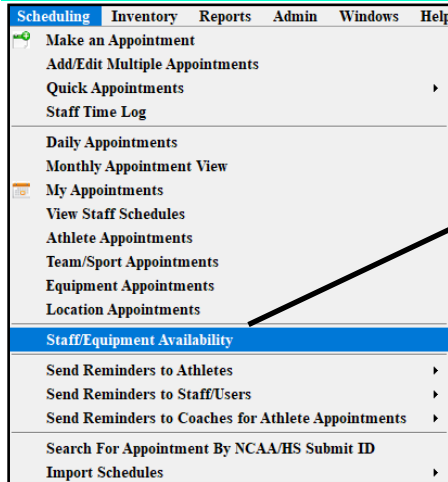
Cycle between staff members, or equipment if you choose to schedule equipment.

The Post button, is how you schedule the appointments you have selected below. This Posts the appointment to your staff profile. Remember to hit post after changing staff or the equipment.

Check the boxes you will be available. You can also use the ALL/NONE boxes at the bottom to select all times.
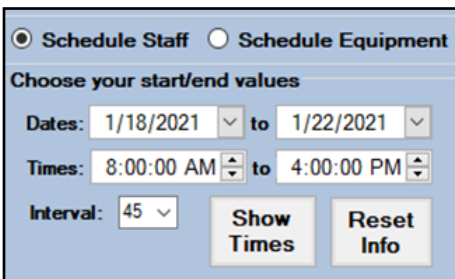
Dates— allows you to schedule times for one day, or however long you would like to schedule for. If you are scheduling for the single day, make sure you check off the hours on the appropriate day of the week.

Times– Change the times you are available. This will shorten the amount of times shown in the colored boxes.

Interval— how many minutes you would like each appointment to be scheduled for.

Show/Reset— Show will reload the information with the configuration of times you have selected. Rest will reset it back to the default times

ATS—Scheduling Overview

Maintaining Appointment Schedules:

There are several utilities to remove staff/equipment availability, clear out schedules and appointments. These utilities can be found under the scheduling utilities menu.

Go to Admin—>Scheduling Utilities—> then make appropriate choice.
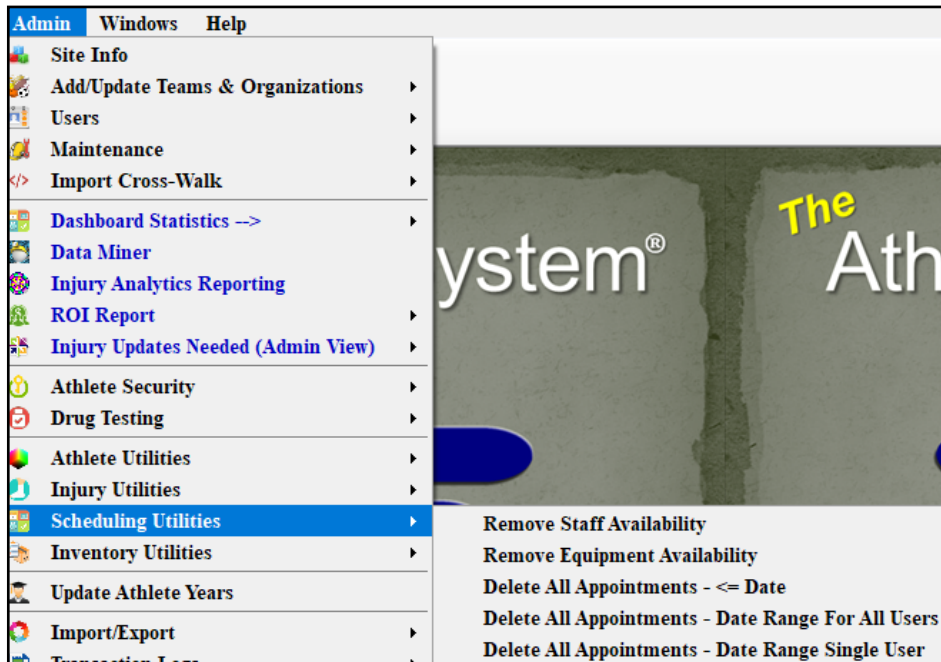
Remove Staff Availability— This allows you to delete unscheduled appointments for a staff member, for a date range

Remove Equipment Availability— allows you to remove unscheduled availability for equipment, if you have it set

Delete All Appointments- <= Date- Allows you to delete appointments from a date you pick and appointments that are before that date

Delete All Appointments– Date Range For All Users— Allows you to clear appointments for a selected date range for all users.

Delete All Appointments— Date Range Single User— Allows you to remove a date range for that specific user.

Appointment Reminders:

If you would like nightly appointment reminders to be sent, you can do this in the Site Info area, opt(1) tab. Click on the ***nightly notices*** t b and then select the people that should get reminders (staff, coach, athlete) and the type of reminder you would like sent (email and/or text).

On the Nightly Notices Tab, select who you want notifications sent to. Athlete, Staff, or Coaches, you can select all if you would like. Also choose which delivery method, email or text. If you select text, do ensure your athletes have a valid text address in their profiles. ** As a note, we have found some cell carriers do not support the email to text conversion that ATS uses to send texts.**

To have the appointment reminders sent by the system, be sure to select the days of the week you want notifications sent. Also select an email address, from the dropdown list, to receive a confirmation email that will provide details of what was processed (how many notifications were sent).

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ATS—Scheduling Overview

Sending Schedule Reminders:

Allows you to manually force the appointment reminders to be sent. You can choose from sending athlete reminders, to the staff or other users, or send reminders to the coaches the athletes have an appointment with you. These emails are not dependent on the SiteInfo Area being set. Again, you will have to manually click run this every time you want the notices sent.

Reports:

There are several different report options for reviewing appointments and details associated. Go to Reports—> #19 Scheduling—> and chose the report and information you are looking for.

ATS—Scheduling Overview

Scheduling from the Staff Portal:

You must customize the administrative features for scheduling from the ATS Desktop. Some of the Admin features are not available on the Staff Portal.

Adding an Appointment allows you to add a single appointment for the time you choose.

Many of the features here are the same as the Desktop. Select the purpose, team if appropriate, the athlete and injury. To add a blank appointment, only select the purpose from the drop down.

Required Fields to save a blank appointment are: Purpose, Max Athletes (1,2,3 etc.), and a start and end time.

Go through the corresponding tabs, and fill in any information. For further explanation of the tabs, please view the scheduling for the Desktop on pg 8.

ATS—Scheduling Overview

Daily Appointments:

Displays the appointments scheduled for you organization. From here, you can see all the injury details, purpose, location, whether they showed, cancelled, or completed. If it is another type of appointment there are places to record other details. The notes the athlete or staff member left are also available. You are also able to filter by team or organization if you choose. Show all button will show all schedule appointments, my appointments will limit it to yours.

My appointments:

My appointment screen will allow you to see what appointments are available. If you would like to see the details, select the appointment and it will take you to the respective details. You can then add details, or edit the appointment that is booked.

ATS—Scheduling Overview

Staff/Equipment Availability:

You are also able to utilize the staff/equipment availability screen. For clarification of the details on the screen, please see the Desktop staff/equipment page, or check out the Staff/Equipment Availability help doc. The functions of the staff/equipment availability are the same as the desktop, the only difference is the appearance.

Reports:

You are able to generate reports as well from the Staff Portal. Below is a list of the available appointment related reports. We do continually edit this list; there is a possibility that it could look different when you view it.
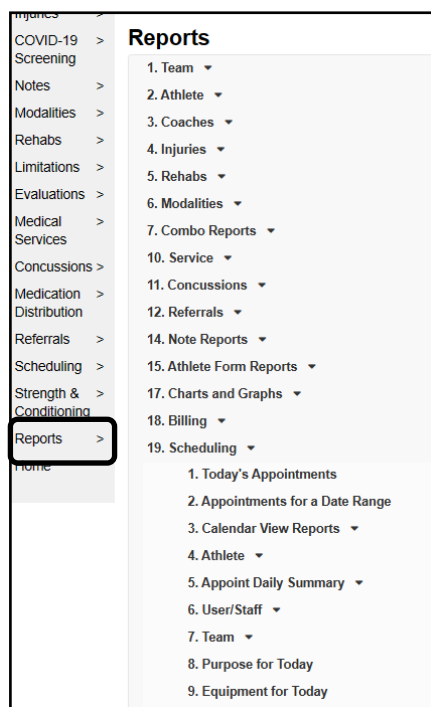
Athletes Scheduling:

Athletes are able to schedule appointments after you post your availability. They will need to log into either the athlete portal, or the athlete phone to access the appointment request feature.

When athletes log in and have selected the Request Appointment Icon, they will see a similar screen to the one above. They can see the instructions you have left, and navigate the days to select the appointments from.

They can select from the dropdown, a staff member, that works with the team. That will display the availability for that person for them to select from.

They will then provide a note for the appointment

After booking, they will see the confirmation message in green. The appointment also comes off of the list below, if you have the auto-accept feature turned on..

✓ Appointment scheduled. The staff member has been notified of the appointment also. ✕

Select a date below to view available open appointment times to request an appointment with your staff members.

Jul	August 2021					Sep
Sun	Mon	Tue	Wed	Thu	Fri	Sat
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

When booking appointments, please select the athletic trainer responsible for your team. Choose ONE(1) appointment per day, and no more than ONE(1) day in advance. Do not book appointments for the future, they will be removed to allow everyone a chance to have access.

The athlete is then able to see their schedule by using the my schedule icon from either their portal or the athlete phone.

MAY
20
My Schedule

My Schedule - JOE TECH

Menu   Logout

Prev   **8/20/2021 - 8/26/2021**   Next   Today

Date: 08/23/2021

Contact Staff   10:30 AM - 11:15 AM - Treatment - Joe Streckfus - Clinic

Database: atsjoe | ATS Athlete Portal Version 2.0.0.0
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Menu   Logout

Staff Notification:

After an athlete books an appointment, the staff member will get an email. It tells them that they have an appointment scheduled with whomever at the time they booked it.

When the appointment is booked, you will also see it appear on your preferred way of looking at your schedule. There are several different ones, you will need to find the one you like the best.

Allowing Athletes to Cancel Appointments:

You now have the ability to allow your athletes to cancel an appointment from their athlete portal/phone. This is an optional feature, and must be enabled for them to cancel.

Step 1:

To enable the Athlete Cancel option, you need to go to Admin—> Site Info.
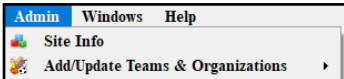
When Site Info opens, select the Athlete Portal tab on the second row of tabs. Then you will need to select Cancel Appointment.
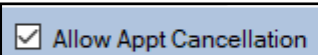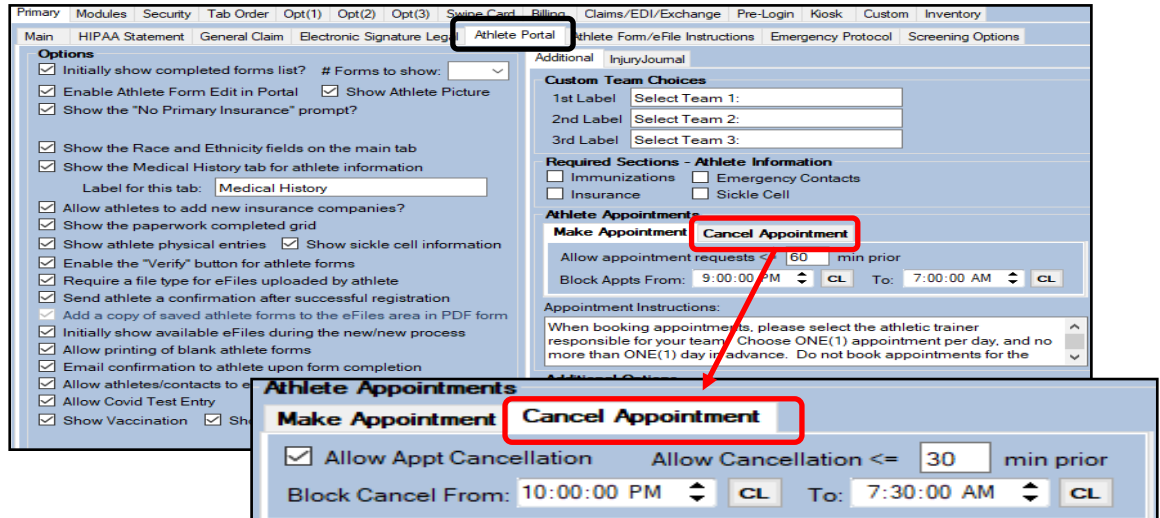
  Place a check mark in the **Allow Appt Cancellation** to enable the athlete to cancel appoints.
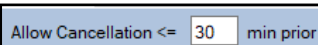
  Allows Cancellation— up to the set time before the appointment. The example would allow the athlete to cancel up to 30 minutes before their appointment.
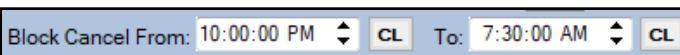
Block Cancel From— This allows you the flexibility to not allow athletes to cancel their appointments. If you don't want athletes to cancel from the over night hours, you can block them from being able to do so. So you don't get bombarded with emails, or have an athlete cancel an appointment for 8am when you are heading in.

After you have SiteInfo set up, you need to go back to the Admin Tab—> Maintenance—> Update Dropdown/Popup List—> Update Dropdown/Popups.

Select NoteType from the popup area.

Locate the Appt Cancel note type, and make sure to put a check mark in the active box. When the A' cancels an appt, you will have a note entered with that note type.

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Step 2:

Athlete Canceling Appointment

After setting up your Site Information area, and you have posted appointment availability. Once your athlete books an appointment, and they realize they will not be able to attend, they can log back into their portal/phone and cancel the appointment (as long as it is the parameters you set up).

— to cancel your athlete will need to log in to their portal or phone and select My Schedule.
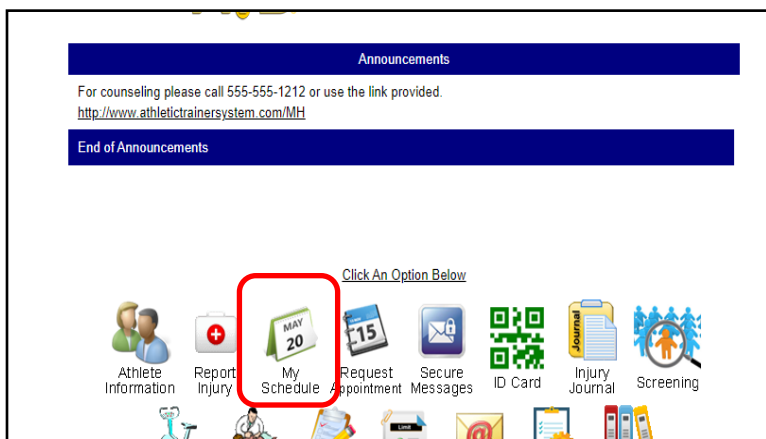
When they select my schedule they will see all of the appointments that they have booked with you. They will need to select the appropriate day and time to cancel. They will need to select the Cancel Appt button. They will then have a prompt are they sure they want to cancel, they need to click ok.
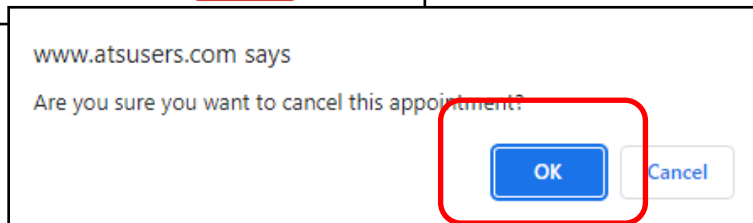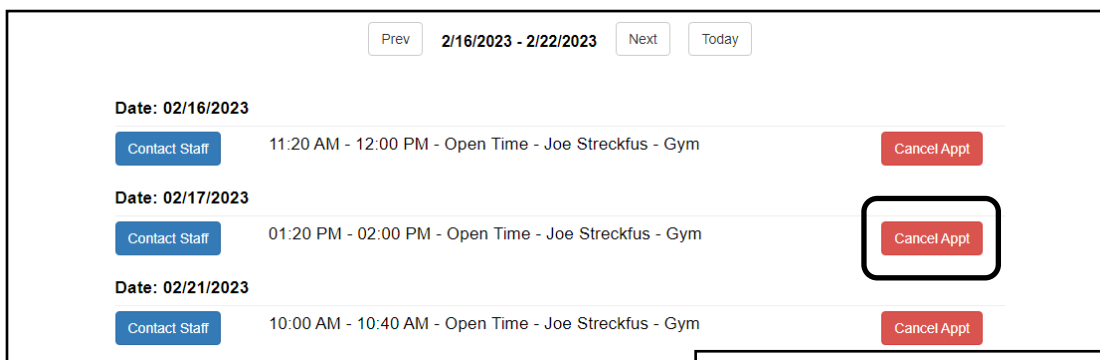
When you athlete sees the green confirmation, they will know the appt has been canceled with you it will no longer be on their schedule. This process will also send the staff member the appointment was booked with an email of the cancellation.

After Appointment Cancellation:

The appointment will come off of the athlete schedule.

The staff member will get an automated email informing you of the cancellation, who it was when it was etc.

Joe Streckfus has canceled the following appointment with you.
Appointment Date: 2/17/2023
Appointment Start Time: 1:20 PM
Purpose: Open Time
Location: Gym

Sports: Another School Coed Soccer , Coed Football

If the appointment time is within the parameters for scheduling appointments (PG 4) , it will be reposted to the schedule for other athletes to book.

On the screens where cancel is visible. The appointment will remain on the schedule, but will be reflected as cancelled so you have historical record, and can be reflected on reports.

There will also be a note entered for the athlete, of the cancelation, so you will have that record as well. It will be entered as a locked note.

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