ACCUTRACK VIEW APPOINTMENTS SCREEN

When you click on View Appointments from the Main Menu, you will see the following options:

- **View/Cancel:** Use to find, view, and modify appointments and also to cancel them.
- **Daily Viewer (detailed):** Use to view tutor's daily appointment schedules.
- **Daily Viewer (summary):** Use to view tutor's daily appointment schedules.
- **Weekly Viewer:** View tutors' weekly schedules.
- **Monthly Viewer**: Launches a monthly appointment viewer.
- **Appointments Quick Daily View:** Launches a daily appointment viewer.
- **Appointment Notes:** View notes entered when appointments were scheduled
- **View Cancellations:** Use to view and void canceled appointments
- **View No-Shows:** Use to view and void appointment no-shows, or to convert no-shows to cancellations.

The following sections have more information on the above screens.

VIEW/CANCEL

Purpose: To view, cancel, repeat, reschedule, etc. appointments.
Access: From **System Administration**, click on **View Appointments > View/Cancel**.
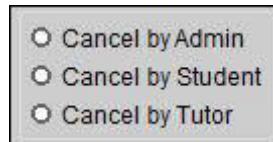
The appointments are displayed in a SuperTable, which means you can sort the records by any column by clicking on its header. To find appointments, you have several filter options available on the right side of the View/Cancel screen. You can use one or a combination of several filters to find the appointments you are looking for. Here are the available filters:

- **Period:** Click to filter your view to a specific period of time.
- **From and To:** If you prefer, you can enter and specific date and time range to filter your view.
- **Tutor:** From the drop-down you can filter on a specific tutor. If you click the eyeglasses icon next to this field, you can search for a specific tutor record.
- **Student:** From the drop-down, you can filter on a specific student. If you click the eyeglasses icon next to this field, you can search for a specific student record.
- **Activity:** Click the + sign to expand the view and you will see a list of your categories. Click the + sign under the category to show the particular activities that are associated with it. Now click and activity to select it.
- **Days:** Click the checkboxes on the days of the week you would like to filter on. By default, All Days are selected.
- **Labs:** Select the dropdown menu and select the Lab you which to filter on. If the default is selected, you will see appointments across all Labs.

After you have set your filters as desired, click the Apply Filter to filter the results in the display grid. If you want to reset back to the default, click the Clear Filters button.
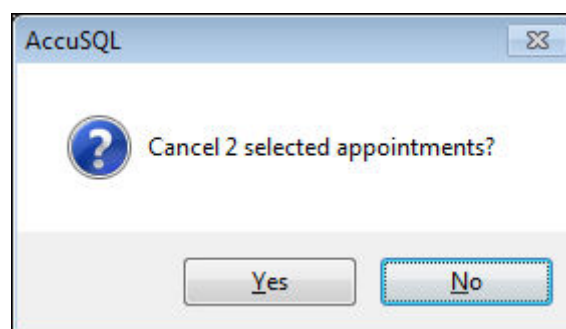
CANCEL APPOINTMENT

The View Appointments screen allows you to cancel one or more appointments. To cancel an appointment(s), first, select the appointment(s) by clicking on the checkbox(es) in the top grid, and then select one of the radio buttons in the bottom left of the screen to determine who is canceling the appointment(s).

Now click on the "Cancel Appointment" button. **AccuSQL/AccuTrack** will display a confirmation message:

If you click on "Yes" the appointment(s) will be canceled. When you generate a report, the canceled appointment will appear with strikethrough text.

If the appointment was canceled by the student, make sure that the "Cancel by Student" option is selected. If the appointment was canceled by the tutor or by an **AccuSQL/AccuTrack** administrator, make sure that one of those options is selected. If one of the latter two is selected, the cancellation will not count against the student.
Depending on the setting in the **Options** screen, **AccuSQL/AccuTrack** may send an e-mail message to both the student and tutor when an appointment is canceled.

RESCHEDULE

Clicking the "Reschedule" button will transport users to the Appointment Wizard. From this screen, the appointment time and date can be changed.

REPEAT APPOINTMENT

Users can easily create repeat appointments from existing sessions in the View/Cancel screen. Simply select which appointment you'd like to repeat from the SuperTable and click on the "Repeat Appointment" button. A separate screen will appear showing the existing appointment's information, as well as a calendar drop-down box from which you can select which day to repeat the appointment.

After you have selected the repeat date from the drop-down box, click Set Appointment. The appointment will be scheduled exactly like the one you selected to repeat, but with the new date.

CHANGE TUTOR

You can change the tutor for an existing appointment from the View/Cancel Screen. Simply click the appointment you want to change the tutor for and click the "Change Tutor" button and a new screen will appear with the existing appointment's information.

You can then choose a new tutor from the drop-down box and click the Change Tutor button. If the attempted change conflicts with the requested tutor's existing schedule, this pop-up will appear:

CHANGE LOCATION

You can modify the location of an existing appointment by clicking the appropriate button on the View/Cancel Appointment screen and selecting a new location from the drop-down box and then clicking the Change Location button.

The locations available for the appointments are setup in the **System > Rooms** screen.
The **View/Cancel Appointment** screen also allows users to reprint appointment confirmation slips. Just click on the **"Print Slip"** button and select the appropriate slip to print.

Switch to Group or Exclusive Appointment

You can switch a group appointment to an exclusive one, or vice–versa by selecting the appointment in the grid then click the **Switch to Group Appointment** or **Switch to Exclusive Appointment** button. The button will change depending on the current status of the appointment. Note: You will need to click Apply Filter to update the changes in the grid. You will notice that the Exclusive column in the grid will change to either Exclusive Yes or No, depending on what you changed it to.

DAILY VIEWER (DETAILED) SCREEN

Purpose: To view daily appointments per tutor.
Access: From **System Administration**, click on **View Appointments > Daily Viewer (detailed)**.

Start by selecting the day you want to view by clicking on it. **AccuSQL/AccuTrack** will display a list of tutors and will show their appointments for the selected day. Exclusive appointments are highlighted in yellow and group appointments are not highlighted at all.

DAILY VIEWER (SUMMARY) SCREEN

Purpose: To view daily appointments per tutor in a condensed view.
Access: From **System Administration**, click on *View Appointments > Daily Viewer (summary)*.

Select a day to view the appointments for all tutors on that day. If you mouse over a colored block, indicating an appointment is scheduled for that tutor for the time indicated, a box will appear on the screen showing the details for that appointment.

WEEKLY VIEWER

Purpose: To view tutors' weekly schedules.
Access: From **System Administration**, click on **View Appointments > Weekly Viewer**.

To view the schedule of a certain week, select the week from the list. Next select the tutor's name. **AccuSQL/AccuTrack** will display the appointments for the selected tutor during the selected week.

MONTHLY VIEWER

Purpose: To view tutors' monthly and daily schedules.
Access: From **System Administration**, click on **View Appointments > Monthly Viewer**.

The Monthly Viewer screen shows a chart of appointments and schedules for all your active tutors. This chart is helpful in identifying open appointments slots and in gauging how busy your center is with appointments.
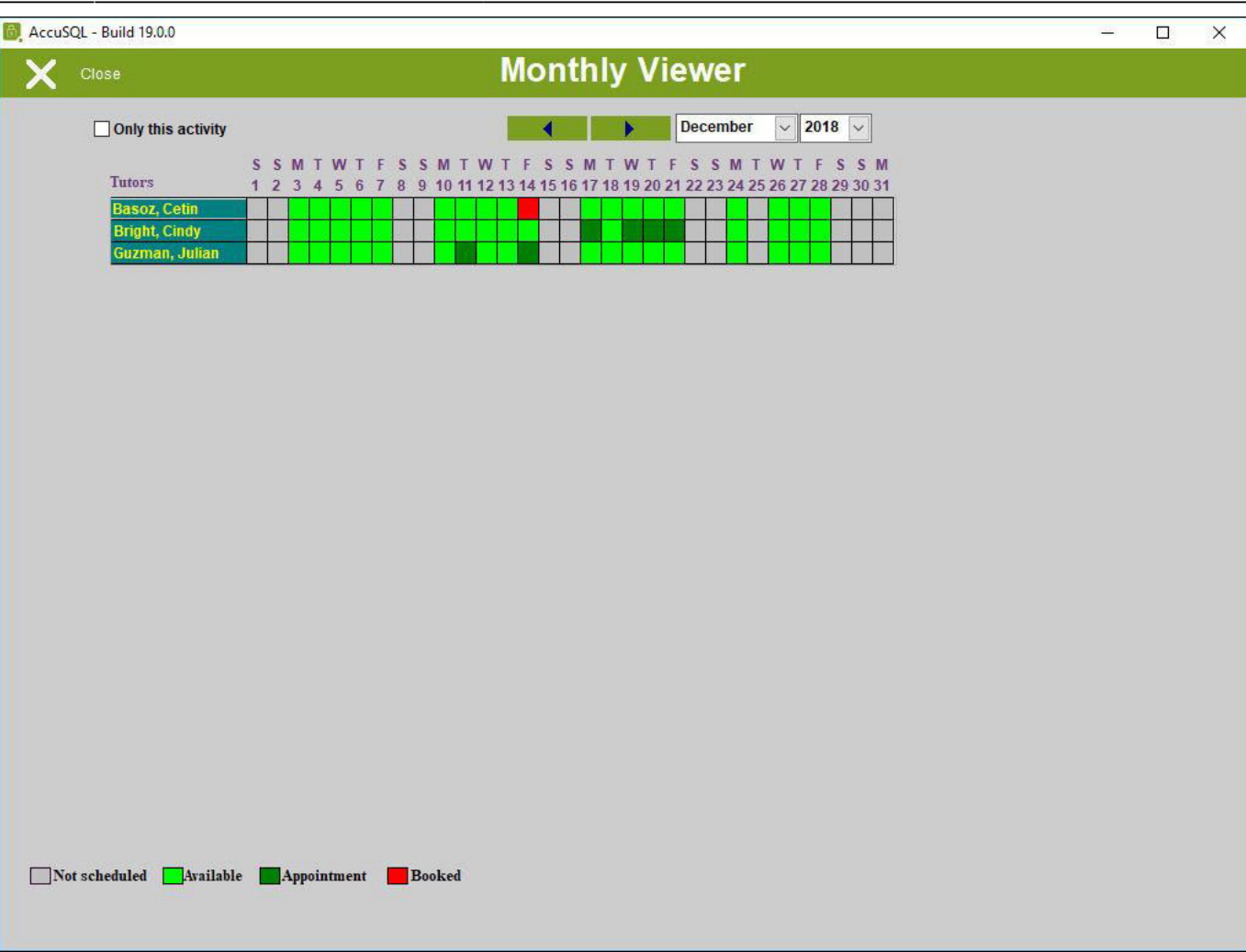
Reading the Chart

As you can see from the screenshot above, the viewer lists the active tutors in the left column. The list is sorted alphabetically by the last name. For each tutor, you will see a row of blocks. Each block represents a day of the month. The days are displayed on top of the first row. The color of each block depends on the appointment's status as follows:

- **Gray block:** Tutor is not scheduled to work on this day.
- **Light green:** Tutor is scheduled to work and does not have any appointments on this day.
- **Dark green:** Tutor is scheduled to work and has one or more appointments on this day.
- **Red:** Tutor is scheduled to work, but is completely booked on this day.

You can restrict the displayed tutors in the Monthly Viewer to the tutors of a certain activity. To do this, click on the "Only this activity" checkbox at the top.
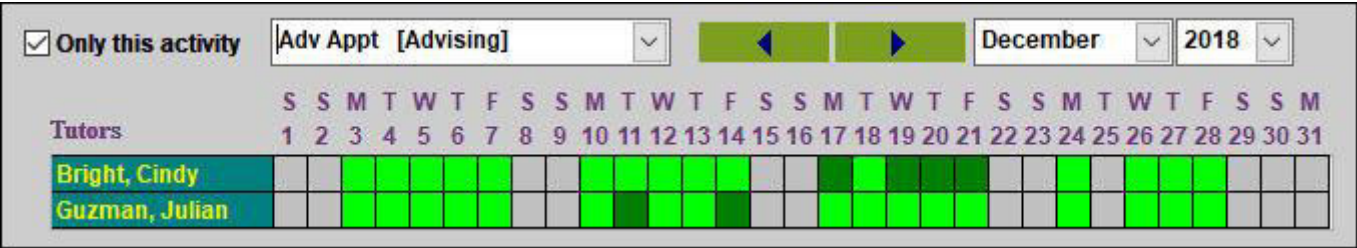
To display all tutors again, simply uncheck the check box.

To see the schedules and appointments of a different month, you can use the next and previous month navigation buttons at the top or the month and year drop-down list boxes.

Zooming in on a Day

To get a detailed view of a certain day of the month, simply click on its block in the Monthly Viewer. This will bring up a daily view of the appointments:
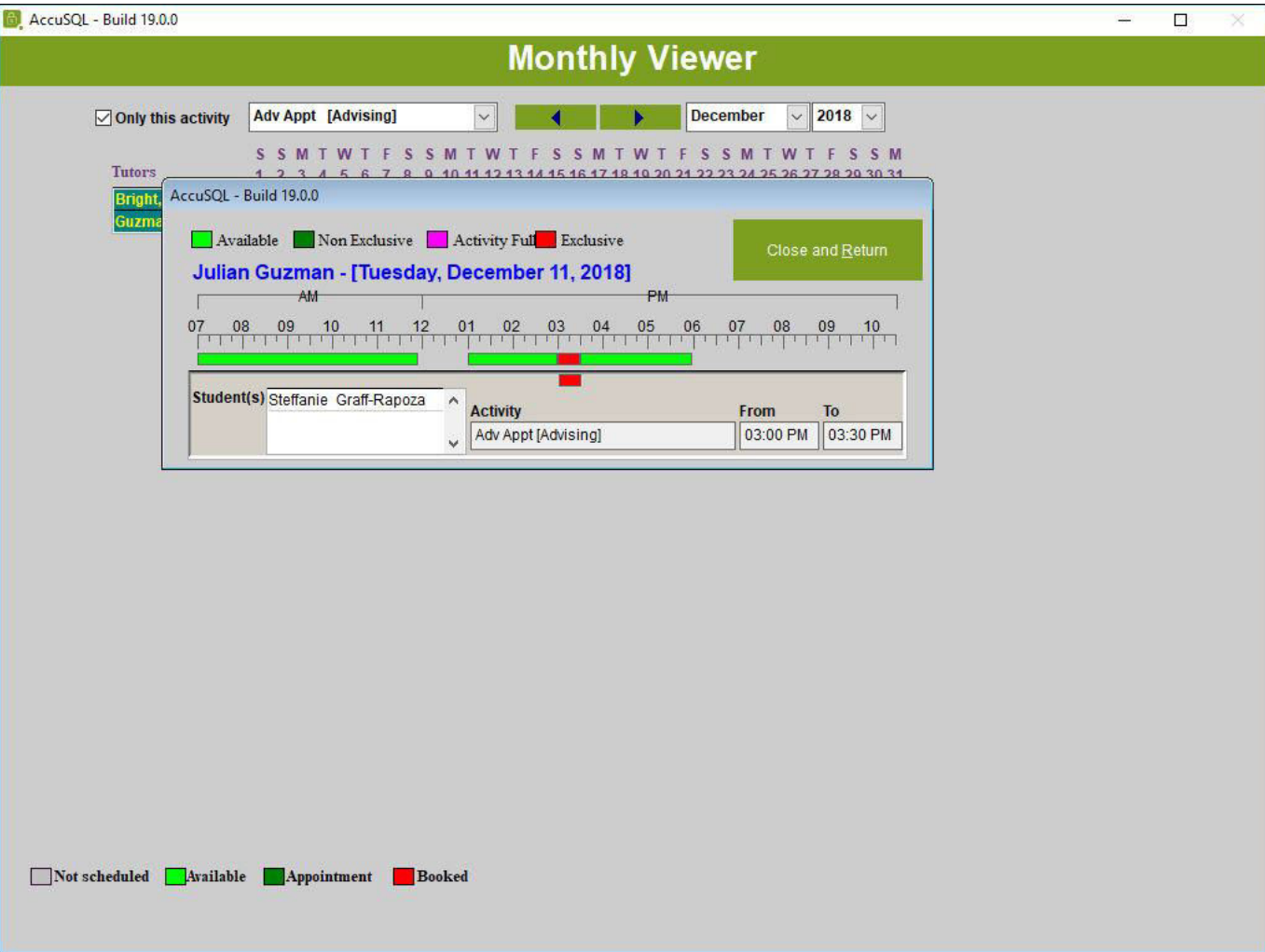
The title bar of the window shows the name of the selected tutor and the date being viewed. Use the **"Close and Return"** button at the top right corner to go back to the Monthly Viewer.

Under the tutor's name, you will see a time ruler showing the hours of the day from 7AM to 10:30 PM. Under this ruler you will see a bar representing the schedule of the selected tutor during the corresponding hours.

The **color of the bar** depends on the schedule status:

Example	Color	Label	Meaning
	Bright Green	Available	Tutor is available and has no appointments during this time.

▬	Dark Green	Non-exclusive	A one-to-many appointment is scheduled. The time slot is still open to more students.
▬	Pink	Activity Full	The maximum number of students allowed per tutor has been reached and the slot is not available for new appointments.
▬	Red	Exclusive	An exclusive appointment is set. No other appointments can be made in this time-slot.

Each appointment is shown in a separate appointment box. The appointment box has a list box with the name(s) of the student(s) scheduled for the appointment. The box also shows the activity (class) name, the start time, and end time of the appointment.

APPOINTMENTS QUICK DAILY VIEW

Purpose: View tutor schedules for a specific date.
Access: From **System Administration**, click on **View Appointments > Appointment Quick Daily View**.

The **Appointments Quick Daily Viewer** screen allows you to select a specific date from an annual calendar view.

Once you have chosen the date that you would like to examine, click the button at the bottom of the screen and a new window will open showing the schedules of all tutors for that day. This schedule follows the previously mentioned **AccuSQL/AccuTrack** color coding.

APPOINTMENT NOTES

Purpose: View notes entered for any scheduled appointments.
Access: From **System Administration**, click on *View Appointments > Appointment Notes*.

As with the View/Cancel screen, you can apply any filters or combination of filters to find specific appointments based on dates, tutors, students, activities, etc. You can also click the Only show appointments with notes checkbox and then click Apply Filter to see only the appointments where notes were entered during the appointment scheduling process.

You can enable notes to be added to appointments when they are scheduled in the **View Appointments > Setup > Appointments Options** screen by selecting the **Add a short note to the appointment made** checkbox.

VIEW CANCELLATIONS

Purpose: To view and void cancelled appointments.
Access: From **System Administration**, click on **View Appointments > View Cancellations**.

This screen lists canceled appointments. You can use the filters on the right side of the screen to filter the viewed list of cancellations. After you set your filters, click the Apply Filter button. You can reset it back by clicking Clear Filters. The cancellations that show up in red text have been canceled by students.

If you like, you can also "void" a cancellation. Voiding a cancellation will delete the appointment record, thus neither the appointment nor the cancellation will appear in **AccuSQL/AccuTrack** Think of a "void" as the appointment never being scheduled in the first place. To void a cancellation, click on the **"Void Cancellations"** tab.

Select the appointment(s) you want to void by using the checkboxes. To void the selected appointments, click on "Delete". You will get a confirmation pop-up message. Click Yes to confirm the deletion.
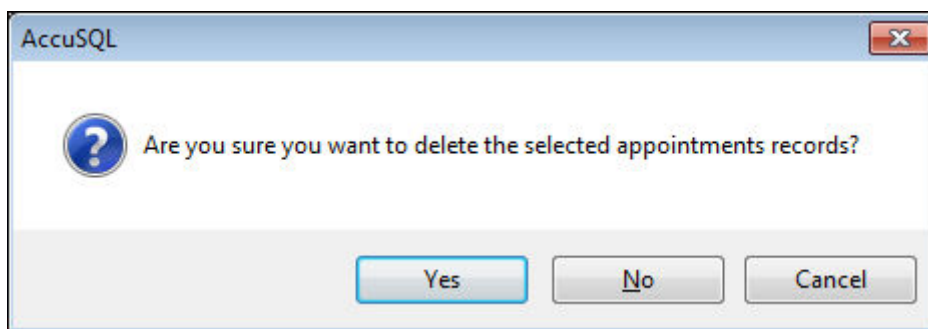
You can setup **AccuSQL/AccuTrack** to freeze appointments when a certain number of appointment cancellations are reached. These cancellations only apply if the appointments were canceled by the student and not by the tutor or an administrator.

VIEW NO-SHOWS

Purpose: To view missed appointments and enter comments. No-shows can also be voided or converted to cancellation using this option.

Access: From **System Administration**, click on *View Appointments > View No-Shows*.

The **SuperTable** in this screen lists missed appointments or no-shows. Here are the fields in this table:

- **Tutor Name:** name of the tutor with whom the appointment was scheduled
- **Activity:** The service appointment was scheduled for.
- **Student:** The student that missed the appointment.
- **Date:** The appointment's date.
- **Start:** The appointment's start time.
- **End:** The appointment's end time.

You can use the **SuperTable** built-in search and sort functions.

No-Show Definition

AccuTrack calculates missed appointments by comparing the sign-in records with appointments records and will consider a student as showing up for the appointment if all three conditions below are met:

1. **The student signed in within the appointment's sign-in window:** The window is a period of X minutes before the appointment's time to Y minutes after it. The administrator defines the appointment's sign-in window by setting X and Y in the **Setup** page of the **Set Appointments**

module, or through the **Control Panel**. For example, if X is set to 10 and Y is set to 15 and an appointment is scheduled at 9:00 AM, then the appointment's sign-in window is 8:50 AM to 9:15 AM. The student must sign in within this time period to satisfy the first condition.

2. **The student signed out before some period of the actual appointment time:** The student must be present for at least some portion of the actual appointment time. So if an appointment is from 9 AM to 9:30 AM, the student must be signed in at least until 9 AM or the system would mark them as a no-show for the appointment and their sign-in/our period would be logged as a walk-in.

3. **The student stayed more than the minimum time period:** The student must sign in for a minimum period of Z minutes during the appointment's time. The administrator defines this minimum period by entering it in the **Setup** page of the **Set Appointments** module, or through the **Control Panel**. For example, if the minimum period is set to 30 minutes, the student must sign in for 30 minutes or longer to satisfy this condition.

4. **Student signs in to the appropriate class:** When the student signs in for the appointment, the student must sign in to the same class the appointment is scheduled. For example, if the appointment is scheduled for Algebra 1, the student must select "Algebra 1" in the Activity Selection screen. If the student selects English Comp 1 instead, the student will be flagged as a no-show for the Algebra 1 appointment. If you choose, you can select the Bypass Activities and Tutor Selection screens for appointments sign-ins checkbox in the **View Appointments > Setup > Appointment Options** screen and the activity and the tutor selected at the time the appointment was made will automatically be used at the time of the appointment sign in, hence making this a non-item.

No-Show Comments

Use the edit box under the no-show table to enter the reason for the no-show. To enter a reason, simply select the appointment by clicking on it. The selected record will appear highlighted. After selecting, type the no-show reason in the edit box. The entry is saved automatically.

The comments you enter here will appear in the no-show report.

VOIDING NO-SHOWS

If you would like to void a no-show so it does not count against the student, click on the "Void No-shows" tab:

This screen is similar to the regular no-show screen, except that now each row has a text box that allows you to select it. To void a no-show, select it by checking its box then click on the "Void" button. Voiding a no-show means the no-show will no longer appear on the screen and will not count against the student when calculating the maximum allowed no-shows per student.

NO-SHOW TO CANCELLATION

If you would like to convert a no-show appointment to an appointment cancellation, click the "No-Show to Cancellation" tab.

This screen is similar to the regular no-show screen, except that now each row has a text box that allows you to select it. To convert a no-show appointment to a cancellation, select it by checking its box then click on the "Cancel" button. You may also choose who the appointment was canceled by. Select one of the three buttons, "Cancel by Admin", "Cancel by Student", or "Cancel by Tutor".

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