



# caregility

## Caregility Video Scheduler User Guide

Version 0.9.4

# Contents

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1	Video Scheduler .....	4
1.1	Terminology .....	4
1.2	Scheduler Actions .....	5
1.3	Access Permissions .....	6
2	Getting Started .....	8
2.1	Sign-in .....	8
2.1.1	Auto Sign-In.....	8
2.1.2	Username and Password Sign-In .....	9
2.2	Signed-In Session .....	9
2.3	Multiple Organizations Landing Page .....	10
2.4	Sign-Out .....	11
3	Navigation .....	12
3.1	Appointments .....	12
3.2	Status .....	13
3.3	Configure Data .....	13
3.4	Home Page .....	13
4	Appointment List .....	14
4.1	List Paging.....	14
4.2	Search by Date .....	15
4.3	Search by Query .....	17
4.4	Export Appointments.....	17
5	Create Appointment .....	19
5.1	Time Zone, Start Date, End Date.....	19
5.2	Appointment Details .....	22
5.3	Abort New Appointment .....	23
6	Manage Appointment .....	24
6.1	Attendee Information.....	24
6.1.1	Emails – Attendee Email Details .....	24
6.1.2	Conference – Attendee Appointment Link .....	25
6.2	Modify Appointment .....	25
6.3	Cancel Appointment.....	26
6.4	No Show Appointment .....	27
7	Scheduler Status.....	28
8	Configure Scheduler Data.....	29
8.1	Add List Option.....	29

8.2	Remove List Option.....	31
8.3	Add Parent List Option .....	32
8.4	Add Child List Option .....	34
8.5	Remove Parent List Option .....	35
8.6	Remove Child List Option .....	37
9	Customer Support .....	39

# 1 Video Scheduler

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The **Caregility Video Scheduler** is a video scheduling web application that allows users to view, create, modify, and cancel video appointments, and features custom branding of unique scheduler organizations and automatic email notifications for all video appointments. Note: Access permissions control which scheduler actions users can perform.

This guide will provide step-by-step instructions to help users sign-in, navigate, and manage video appointments.

## 1.1 Terminology

This section defines the terminology used throughout this guide.

**Web Application** – software application that is accessible through the Internet with a *web browser*

**Web Browser** – software running on an Internet connected device such as a PC, smart phone, or tablet, that loads web pages and allows the *user* to access a *web application*; examples include Microsoft Edge, Google Chrome, Mozilla Firefox

**User** – person using a *web browser* to access a *web application*

**Directory Server** – user identity and access management service that controls user *access permissions* for all protected *web applications*; Microsoft Active Directory is a well-known directory server, but other directory server options may also be used

**Email Server** – email sending and receiving service that controls the delivery of emails to internal and external recipients

**Access Permissions** – security related permissions that are configured and stored in a *directory server*; used by *web applications* to determine whether a *user* is allowed to access data, and what limits may apply to their ability to perform certain actions

**Scheduler Organization** – organization, sub-organization, or other entity that has a requirement for a unique video scheduler solution with custom *access permissions*, isolated *video appointment* data, and *custom* email and web page *branding*

**Portal Link** – *web browser* link (known as a URL), provided by the *scheduler organization* administrator, to access the video scheduler *sign-in* page (see section 2)

**Sign-In** – the process of a *user* navigating to a *web application*, providing sign-in credentials, and being granted access to some or all data during a *signed-in session* (see section 2.1)

**Signed-In Session** – after a user successfully provides sign-in credentials, the *web browser* is capable of storing a *session token* to keep a user signed-in to the *web application* for a period of time (see section 2.2)

**Session Token** – a session token is a type of browser cookie that can be stored by the *web browser* after *sign-in*, and can then be automatically provided back to the *web application* that granted the token during future interactions; effectively, a session token represents time-sensitive, digitally-signed identity and *access permissions* that force the *user* to *sign-in* again after expiration or sign-out

**Automatic Sign-In** – also referred to as single sign-on (SSO) – a process that allows *users* to *sign-in* to a *web application* automatically, based on identity within a network or domain, as negotiated via the *directory server*, *web application*, and user device (see section 2.1.1)

**Custom Branding** – each unique *scheduler organization* provides a custom experience; images, colors, and fonts are configured specifically for the scheduler organization

**Video Appointment** – a scheduled virtual appointment; provides two-way audio and video capabilities through a *web browser* for two or more *attendees*.

**Appointment Link** – a link to a specific *video appointment* that is sent via email; when clicked, the link opens a *web browser* and automatically connects to the scheduled *video appointment*

**Attendee** – person who receives *appointment link* via email, clicks the link, and is automatically connected to a scheduled *video appointment* via *web browser*; attendees may be classified as Host or Guest, which may provide additional controls over the *video appointment*

## 1.2 Scheduler Actions

The following actions can be performed by users of the video scheduler. Note: The actions that can be performed are based upon the permissions assigned to that user (see section 1.3).

**View Appointment List** – Appointment List page displays one or more pages of video appointments in a table view, with “Prev” and “Next” buttons that can be used to navigate to prior or subsequent pages (see section 4.1)

**View Filtered Appointment List** – Appointment List page displays one or more pages of filtered video appointments in a table view when “Search by Date” or “Search by Query” filters are applied by the user (see section 4.2 and 4.3)

**Export Appointment List** – Appointment List page entries may be exported to a comma-separated values (CSV) file (see section 4.4)

**Create Appointment** – Create Appointment page allows the user to enter values for a new video appointment and save changes, sending out invitation emails with appointment details to all attendees (see section 5)

**View Appointment** – Manage Appointment page displays a single video appointment, allowing the user to see when emails were sent, and to view the appointment link for each attendee (see section 6)

**Update Appointment** – Manage Appointment page allows the user to modify values for a single video appointment and save changes, sending out invitation emails with updated details to all attendees (see section 6.2)

**No Show Appointment** – Manage Appointment page allows the user to mark a single video appointment as “No Show”, sending out “No Show” emails to all attendees (see section 7); indicates one or more attendee(s) did not join the video appointment

**Cancel Appointment** – Manage Appointment page allows the user to mark a single video appointment as “Canceled”, sending out “Cancellation” emails to all attendees (see section 6.4); indicates the video appointment has been disabled

**Configure Scheduler Data** – Configure Scheduler Data page allows the user to modify the values that appear in drop-down select inputs when creating and updating video appointments (see section 8)

**Automatic Emails** – all scheduler actions performed by users are tracked, and emails – video appointment invitations, updates, reminders, no shows, and cancelations – are automatically sent to all attendees; emails include appointment links for one-click connection to video appointments

### 1.3 Access Permissions

The following access permissions determine the user’s ability to perform some or all scheduler actions. Note: If you believe you should be granted additional access permissions or access permissions to a specific scheduler organization, please speak with your administrator.

**Admin User** – Admin access level that allows users to Configure Scheduler Data, and perform all video appointment related actions

**Master Schedule User** – Schedule access level that allows users to View, Create, Update, Cancel, No Show any video appointments

**Plus Schedule User** – Schedule access level that allows users to View, Create, Update, and No Show any video appointments, but users are limited to Cancel only video appointments created by the user

**Schedule User** – Schedule access level that allows users to View and Create any video appointments, but users are limited to Update, Cancel, and No Show only video appointments created by the user

**View Schedule User** – Schedule access level that only allows users to View any video appointments, including the ability to Export

Access Level	Configure Scheduler Data	Create Appointment	Update Appointment		Cancel Appointment		Mark No Show		View Appointment		View & View Filtered Appointment List	Export	Auto Emails
			Own	All	Own	All	Own	All	Own	All			
<b>Admin Access Level</b>													
Admin User	X	X	X	X	X	X	X	X	X	X	X	X	X
<b>Schedule Access Level</b>													
Master Schedule User		X	X	X	X	X	X	X	X	X	X	X	X
Plus Schedule User		X	X	X	X		X	X	X	X	X	X	X
Schedule User		X	X		X		X		X	X	X	X	X
View Schedule User										X	X	X	

## 2 Getting Started

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Sign-in to the Caregility Video Scheduler by navigating to the following portal link, established by the scheduler organization administrator:

<https://scheduler.vc.va.gov/scheduler>

### 2.1 Sign-in

After navigating to the sign-in page via the portal link, the user may choose one of two different sign-in methods: **Auto Sign-In** and **Username and Password Sign-In**.

#### 2.1.1 Auto Sign-In

The auto sign-in function can be used to automatically attempt sign-in without the need to enter username or password. This option is ideal when the user is already signed-in to an approved directory server, such as on a work PC in an office environment.

After navigating to the sign-in page via the portal link (identified in section 3), the user may automatically sign-in to the video scheduler. Simply click **Auto Sign In** to sign-in.

Note: If you have difficulty utilizing the auto sign-in function, please contact your scheduler organization administrator. Until resolved, sign-in using the username and password sign-in option.

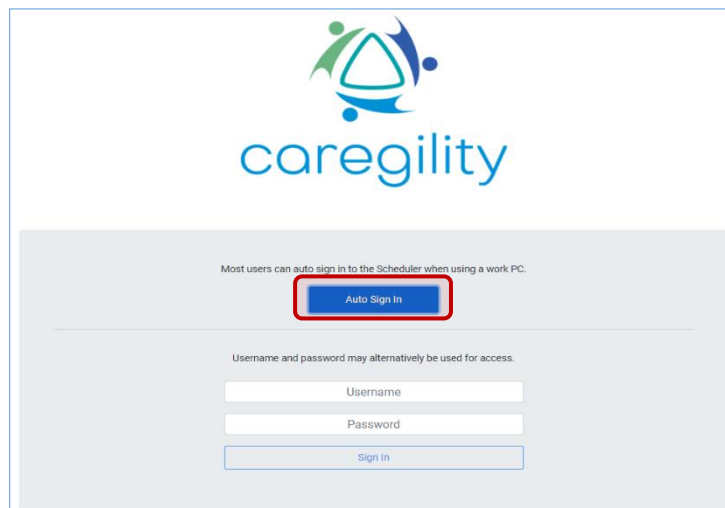


Figure 1: Auto Sign In Button



### 2.1.2 Username and Password Sign-In

As an alternative, username, and password sign-in may be used. This option is ideal when working with an outside PC, or when working remote from the approved directory server.

After navigating to the sign-in page via the portal link (identified in section 3), the user will enter their username and password, then click **Sign In** to validate credentials and sign-in.

Note: If you have difficulty utilizing the username and password sign-in, please contact your scheduler organization administrator.

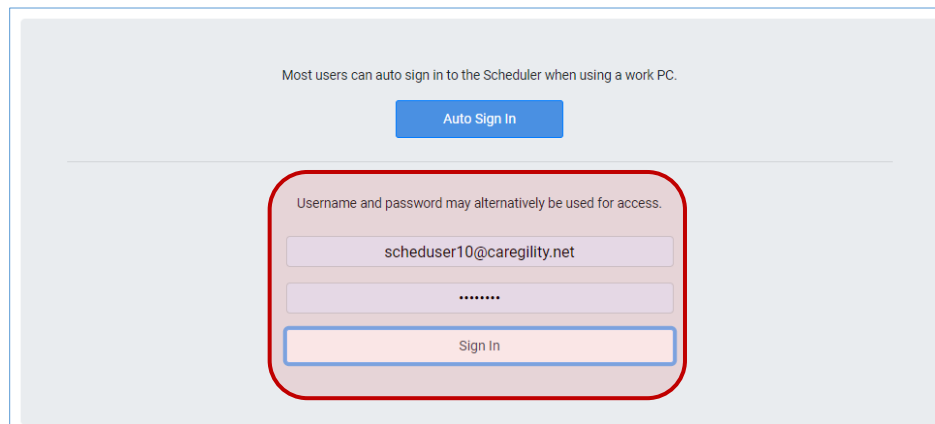


Figure 2: Username and Password Sign In

## 2.2 Signed-In Session

After successful sign-in to the video scheduler, most users will be automatically redirected to a signed-in session for a specific scheduler organization. The browser will receive a session cookie which will retain user identity while signed in.

The user should always sign-out of the video scheduler when work is complete to prevent session-based access from their PC (see section 2.4 for sign-out instructions). Alternatively, the user should employ methods to lock access to their PC to prevent use of the video scheduler signed-in session by others.

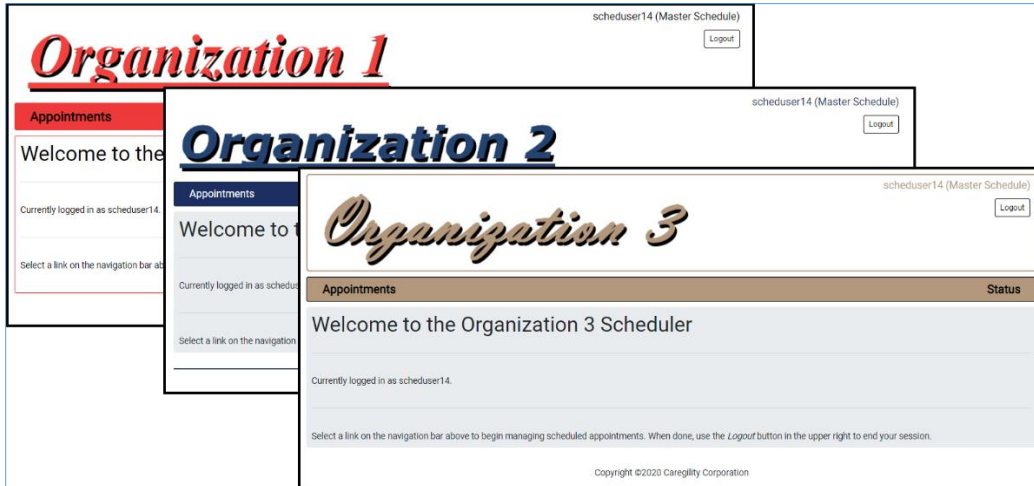


Figure 3: Three Scheduler Organization Specific Home Pages with Custom Branding

### 2.3 Multiple Organizations Landing Page

As noted in section 2.2, most users will be automatically redirected to a signed-in session for a specific scheduler organization after their initial sign-in to the video scheduler. However, some users may be presented with a landing page if a single scheduler organization cannot be determined.

The landing page will identify all unique scheduler organizations the user has been granted access permissions to. Buttons containing unique organization IDs for each scheduler organization will be provided on the landing page. The user will click the button for the organization they wish to access, which redirects the user to a signed-in session for the selected scheduler organization.

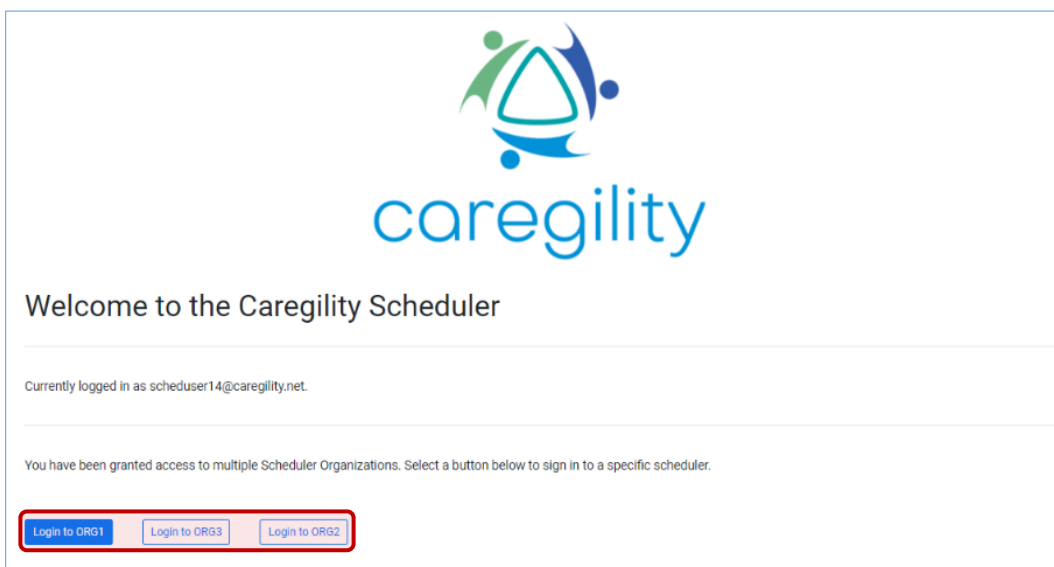


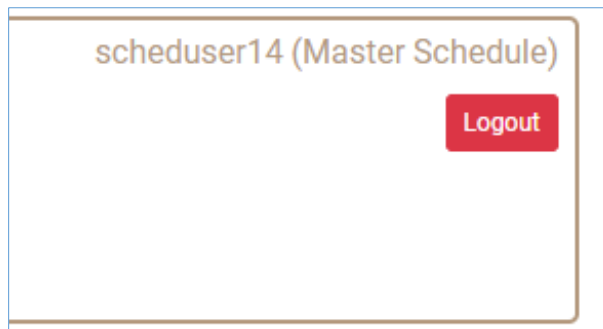
Figure 4: Multiple Organizations Landing Page Scheduler Organization Buttons

Note: In order to sign-in to a different scheduler organization, the user must sign-out and then sign-in again.

## 2.4 Sign-Out

It is recommended that users sign-out when they are done using the video scheduler to prevent their signed-in session from being used by others. The **Logout** button is located in the top right corner of all video scheduler pages.

The user can click the **Logout** button to clear the signed-in session web browser cookie and sign-out of the scheduler organization. The user will then be redirected to the sign-in page.



*Figure 5: Sign-Out using the Logout Button*

Video scheduler signed-in session cookies expire after a number of hours. Users may be automatically signed-out and returned to the sign-in page during long-running sessions. However, the user should not rely on auto sign-out, and should always manually end each session using the **Logout** button.

## 3 Navigation

After sign-in to a specific scheduler organization, the user will be provided **Navigation Links** in the **Navigation Bar** section below the **Header Section**. Depending on access permissions and custom branding, the navigation bar may look slightly different, but the links all have the same function.

All users will have the **Appointments** (see section 3.1) and **Status** navigation links (see section 3.2) in the navigation bar. Only Admin level users will have the **Configure Data** navigation link (see section 3.3).

Above the navigation bar, the **Header Section** contains the username, access permissions, and logout button in the top right corner, as well as the **Custom Branding Image** (see section 3.4) on the left.

**Header Section** – the top section on all video scheduler pages, including the scheduler organization custom branded image, the signed-in session username, access permissions, and the Logout button

**Navigation Bar** – the navigation bar section is provided on all video scheduler pages, below the header section, providing navigation links for users to click

**Navigation Link** – web browser link that will load the page associated with the navigation link when clicked; navigation links are located in the navigation bar



Figure 2: Page Header and Navigation Bar with Navigation Links for Schedule and Admin Users

### 3.1 Appointments

The **Appointments** navigation link (on the left side of the navigation bar) will navigate the user to the **Appointment List** page (see section 4).



Figure 3: Appointments Navigation Link

### 3.2 Status

The **Status** navigation link (on the right side of the navigation bar) will navigate the user to the **Scheduler Status** page (see section 7).



Figure 8: Status Navigation Link

### 3.3 Configure Data

The **Configure Data** navigation link (on the left side of the navigation bar) will only appear for Admin Users, and will navigate the Admin User to the **Configure Scheduler Data** page (see section 8).

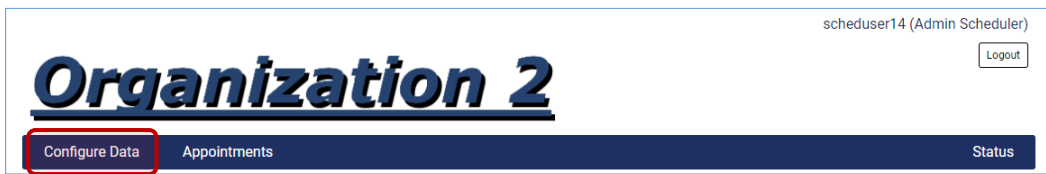


Figure 9: Configure Data Navigation Link

### 3.4 Home Page

The header section **Custom Branding Image** (above the navigation bar) can be clicked from any video scheduler page to navigate the user back to the scheduler organization home page.

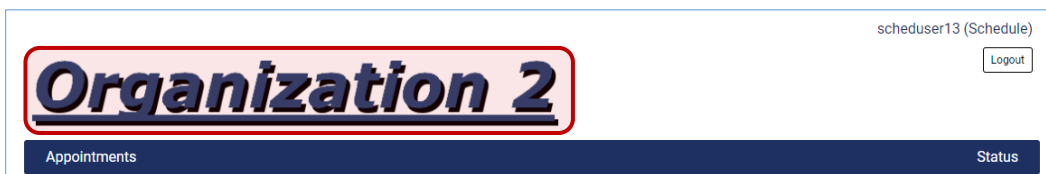


Figure 10: Custom Branding Image Home Page Navigation Link

## 4 Appointment List

After clicking the **Appointments** navigation link on the navigation bar, the **Appointment List** page will load.

The appointment list page will display a list of video appointments, which may span many pages, and provides the option to filter results. If no filters are applied, the default search will display all present and future video appointments.

Clicking any individual video appointment in the appointment list will navigate to the **Manage Appointment** page for the selected appointment (see section 6), where users can view and update the video appointment.

Users who have access permissions to create appointments (see section 1.3) will see the **Schedule a New Appointment** button at the bottom left corner of the page (see section 5).

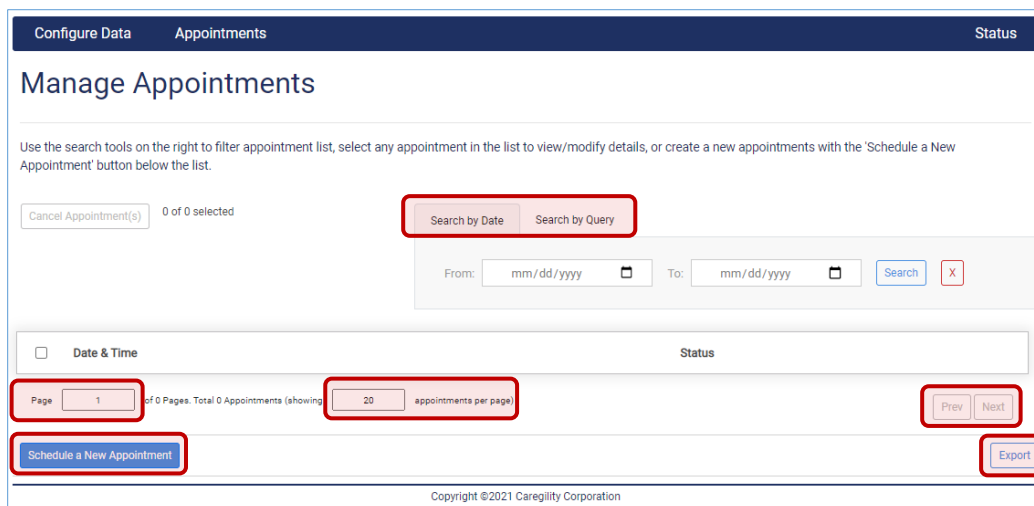


Figure 11: Appointment List Page Search, Actions, and Paging

### 4.1 List Paging

The **Appointment List** page provides users with list paging controls to manage which “page” of data is displayed in the table.

The **Prev** and **Next** buttons (below the appointment list), allow users to navigate between the different pages of the appointment list.

A specific page number can be manually entered by modifying the number value in the **Page** field. The number of appointments listed on each page can be changed using the **appointments per page** field.

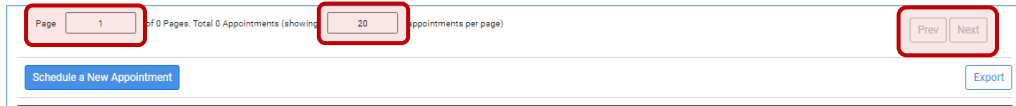


Figure 20: Appointment List Paging “Prev”, “Next”, “Page”, and “Appointments per page”

The appointment list page will automatically refresh on any list paging button click or number change.

## 4.2 Search by Date

The appointment list page offers the **Search by Date** filter tab (below the navigation bar and above the appointment list), which filters the list to include only the appointments that occur within the specified date range.

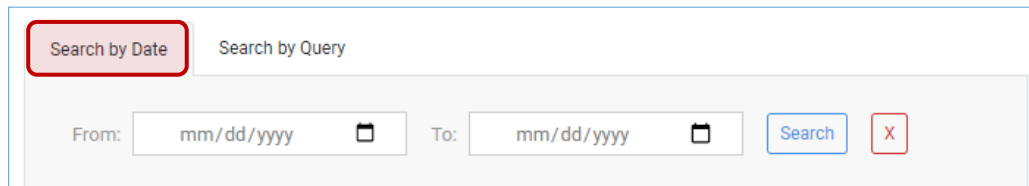


Figure 12: Appointment List Page Search by Date Filter

The user may choose one or both of the **From** and **To** date selectors to indicate the desired date range, before clicking the **Search** button to apply the filter.

The date selections may be modified and the **Search** button clicked again to update and apply the date range filter.

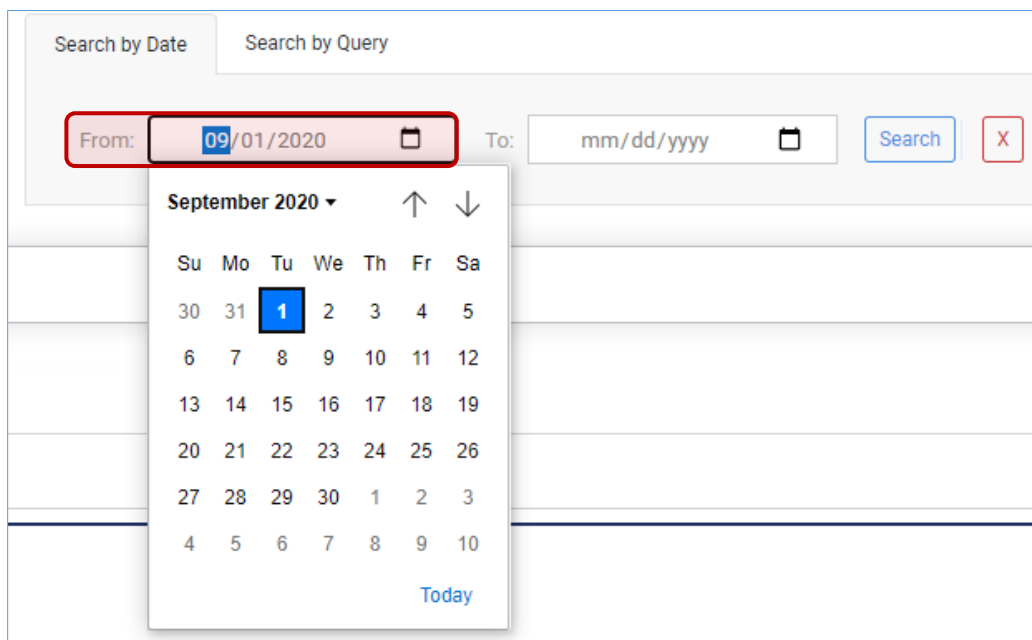


Figure 13: Appointment List Page Search by Date “From” Date Selector

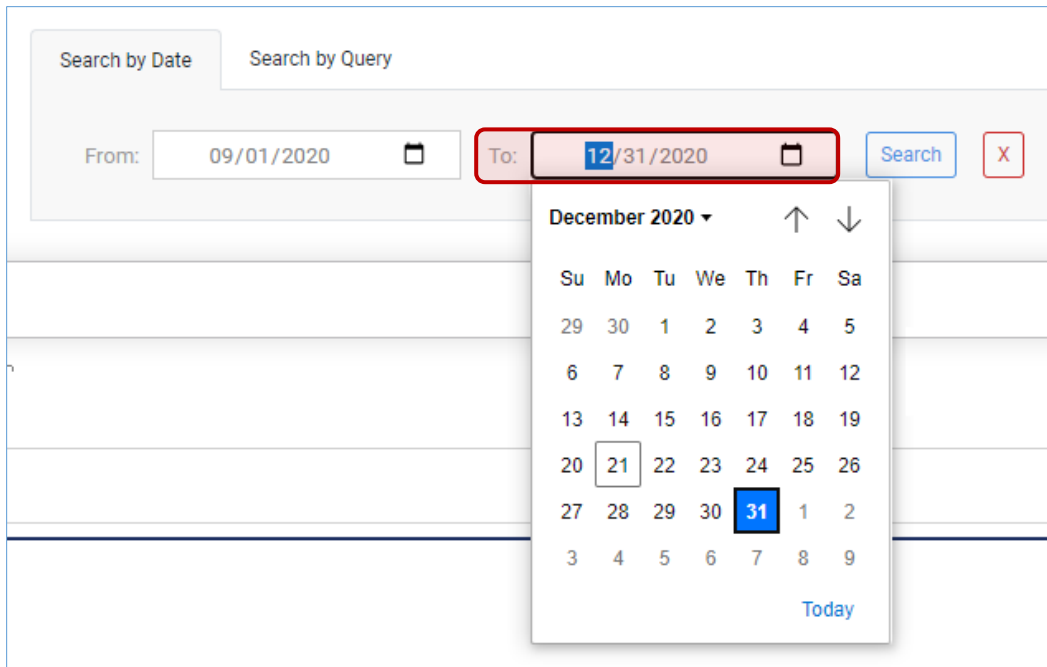


Figure 14: Appointment List Page Search by Date “To” Date Selector

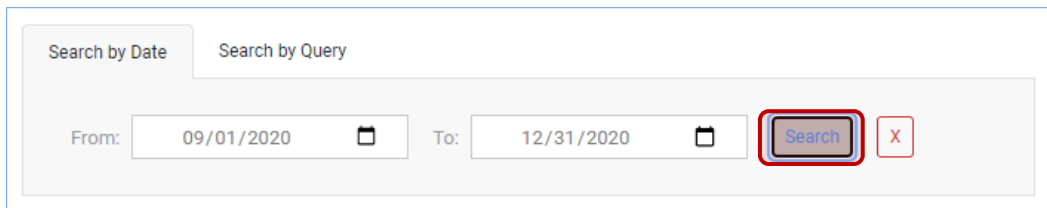


Figure 15: Appointment List Page Search by Date “Search” Button

The user may click the **X** button (next to **Search** button) to clear both date selections.

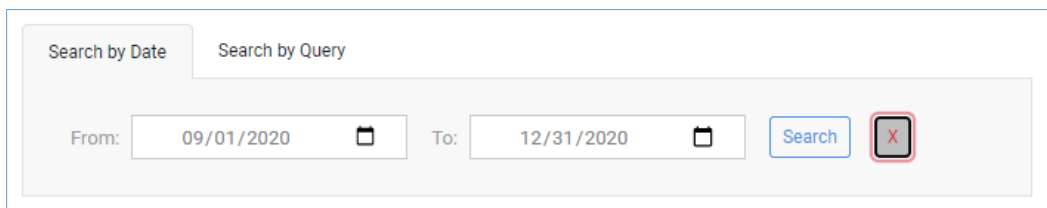


Figure 16: Appointment List Page Search by Date “X” Clear Button



### 4.3 Search by Query

The **Appointment List** page offers the **Search by Query** filter tab (below the navigation bar and above the appointment list), which filters the list based on the specified search text.

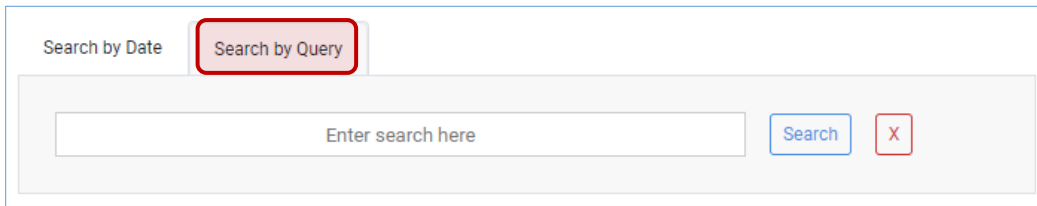


Figure 17: Appointment List Page Search by Query Filter Tab

The search text field allows the user to enter full or partial search text, before clicking the **Search** button to apply the filter.

The search text can be modified and the **Search** button clicked again to update and apply the query filter.



Figure 18: Appointment List Page Search by Query Search Text and "Search" Button

The user may click the **X** button (next to the **Search** button) to clear the existing search text.

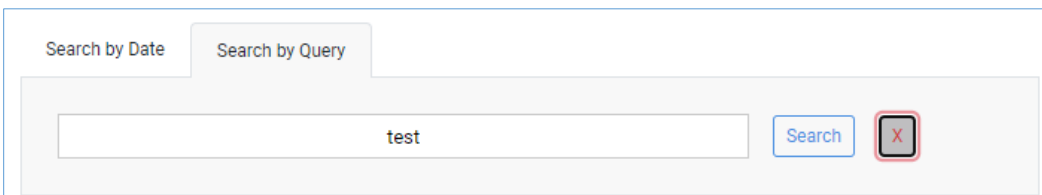


Figure 19: Appointment List Page Search by Query "X" Clear Button

### 4.4 Export Appointments

The **Appointment List** page also includes the **Export** button (below the appointment list), which allows the appointment list to be exported as a comma-separated values (CSV) file.

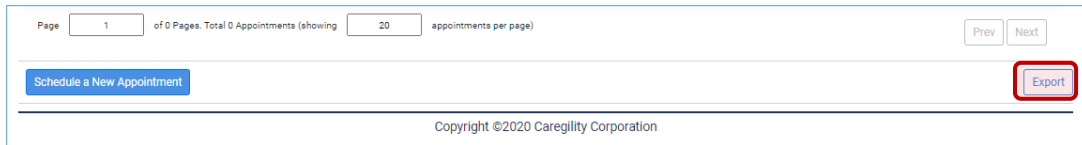


Figure 21: Appointment List “Export” Button

Once the **Export** button is clicked, the browser will either ask the user to select the location to which to save the CSV file, or will automatically begin downloading the file to the local PC. The user should see an indication in the browser of the completed download.

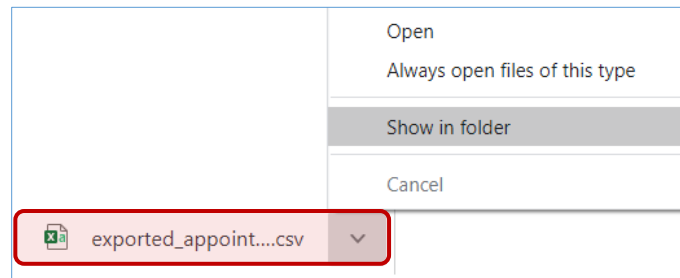


Figure 22: Appointment List “Export” CSV File Downloaded

Note: The export action will include all video appointments displayed on the current page of results on the appointment list page. To export a larger number of results, the user should modify the **appointments per page** value to match or exceed the number of video appointments being exported (maximum of 1000 appointments per page and per exported page).

## 5 Create Appointment

As noted in section 4, users who have access permissions to create appointments (see section 1.3) will see the **Schedule a New Appointment** button at the bottom left corner of the page (see section 5).

Users with the appropriate permissions can click the **Schedule a New Appointment** button on the appointment list page to navigate to the **Create Appointment** page, which will display an empty video appointment form.

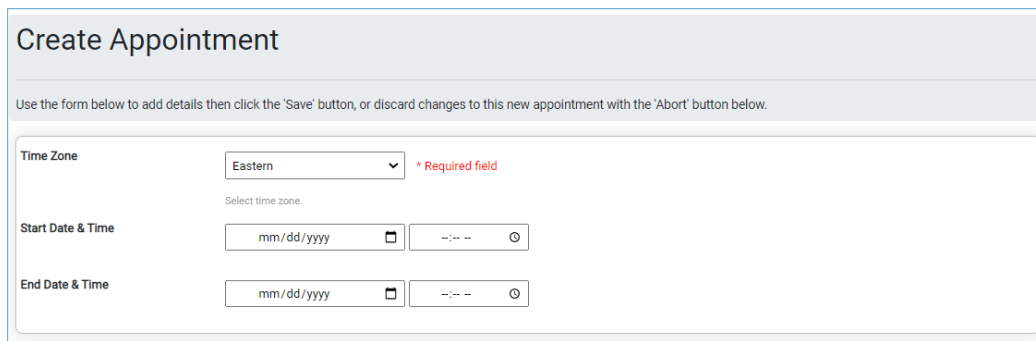


Figure 23: Create Appointment Page – Empty Form

### 5.1 Time Zone, Start Date, End Date

When the Create Appointment page loads, the user's locally configured time zone will be auto selected in the **Time Zone** drop-down. The selected time zone will be used for both **Start Date** and **End Date** times. The user may select a different time zone if desired.

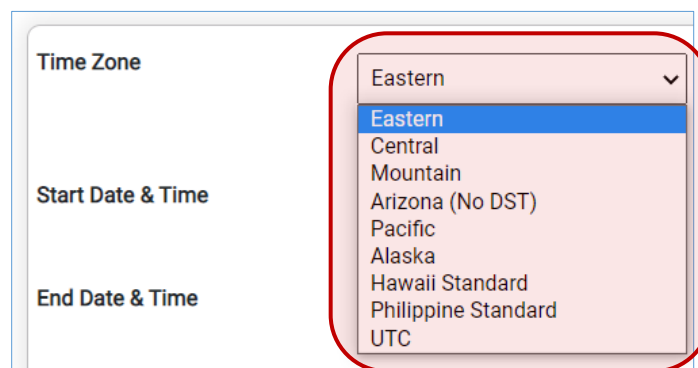
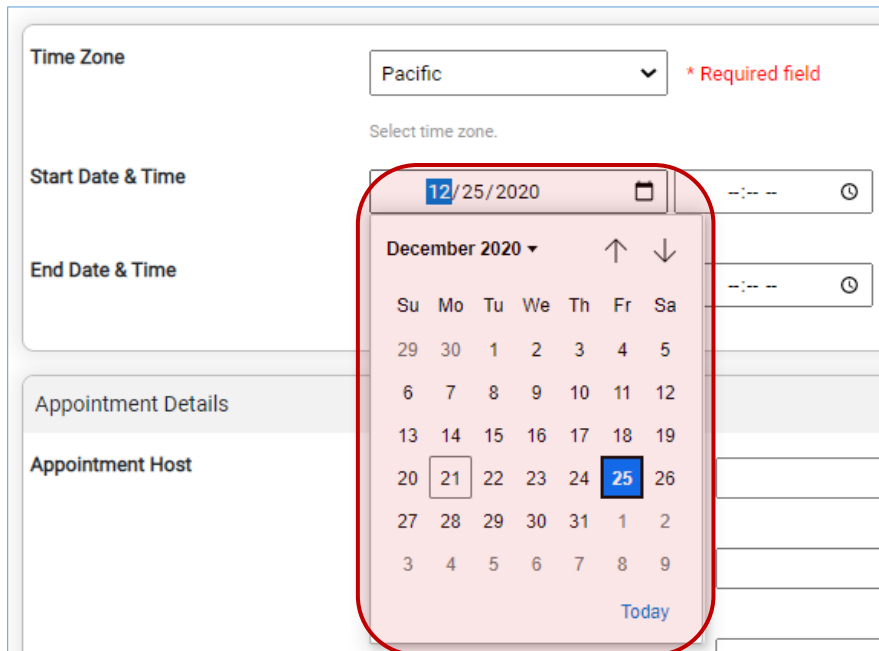


Figure 24: Create Appointment Select Time Zone

If the user's locally configured time zone cannot be identified, or it does not match any of the available time zones in the drop-down list, the first option in the drop-down will be auto selected.

The user must select **Start Date & Time** and **End Date & Time** values, which can be accomplished by first selecting Date (click the calendar icon), then selecting Time (click the clock icon).

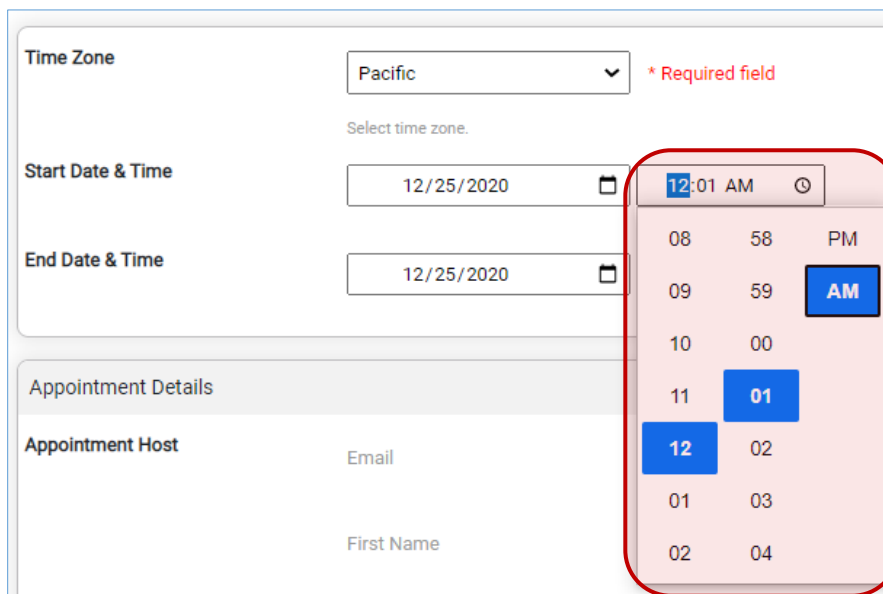


The screenshot shows a form with the following fields:

- Time Zone:** Pacific (dropdown menu, marked as a required field).
- Start Date & Time:** 12/25/2020 (calendar icon).
- End Date & Time:** (empty, clock icon).
- Appointment Details:** (greyed out section).
- Appointment Host:** (empty text field).

A calendar pop-up is displayed over the 'Start Date & Time' field, showing the month of December 2020. The date 12/25/2020 is selected and highlighted in blue.

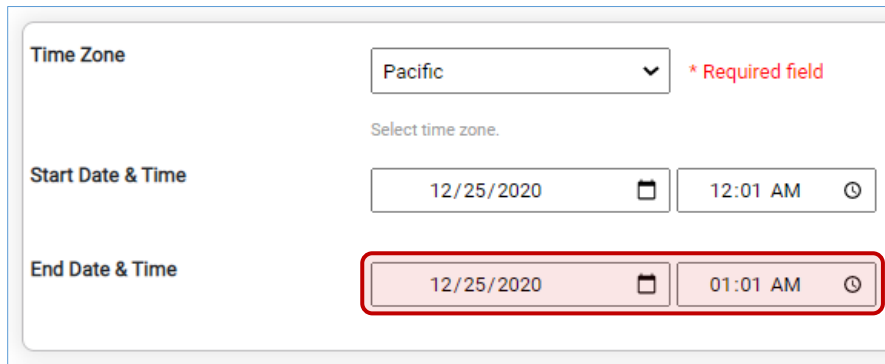
Figure 25: Create Appointment Select Start Date



The screenshot shows the same form as Figure 25, but with the time selection clock open over the 'Start Date & Time' field. The clock displays the time 12:01 AM, which is selected and highlighted in blue. The 'End Date & Time' field now also shows 12/25/2020.

Figure 26: Create Appointment Select Start Time

Selecting **Start Date & Time** values will pre-populate the **End Date & Time** values to be 1 hour after the start time by default.

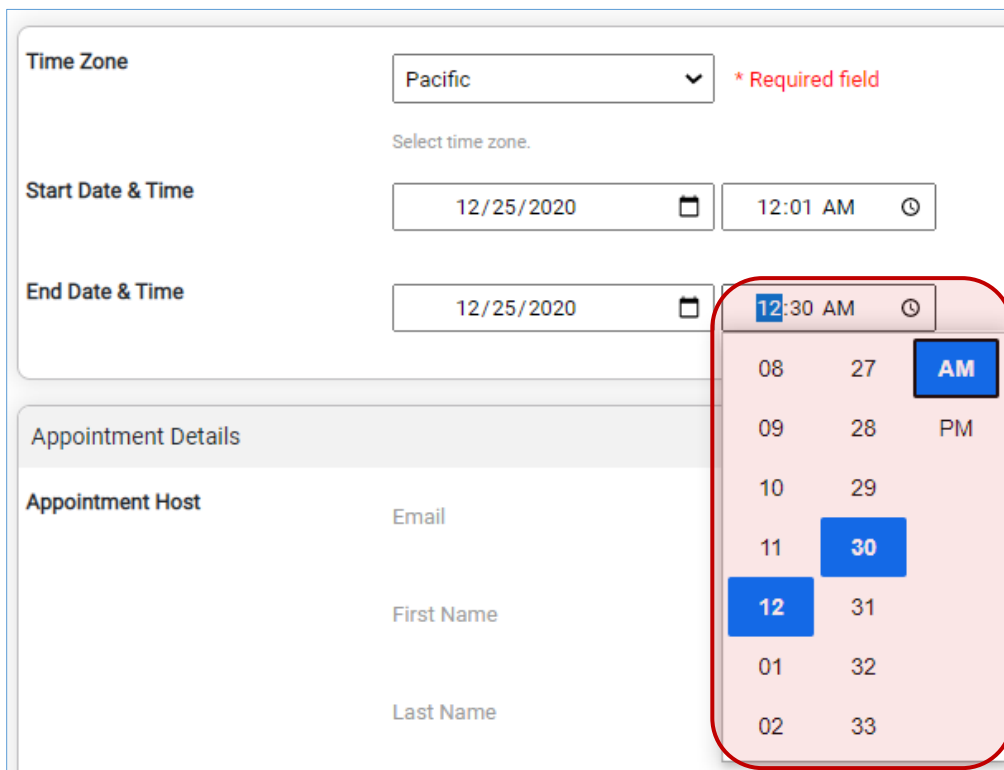


The screenshot shows a form with three main sections:
 

- Time Zone:** A dropdown menu set to "Pacific" with a red asterisk and the text "\* Required field" to its right. Below it is the instruction "Select time zone."
- Start Date & Time:** A date picker set to "12/25/2020" and a time picker set to "12:01 AM".
- End Date & Time:** A date picker set to "12/25/2020" and a time picker set to "01:01 AM". This entire section is highlighted with a red border.

Figure 27: Create Appointment End Date & Time Pre-populated

The user may modify the pre-populated **End Date & Time** values using the same Date and Time pickers as the Start Date & Time.



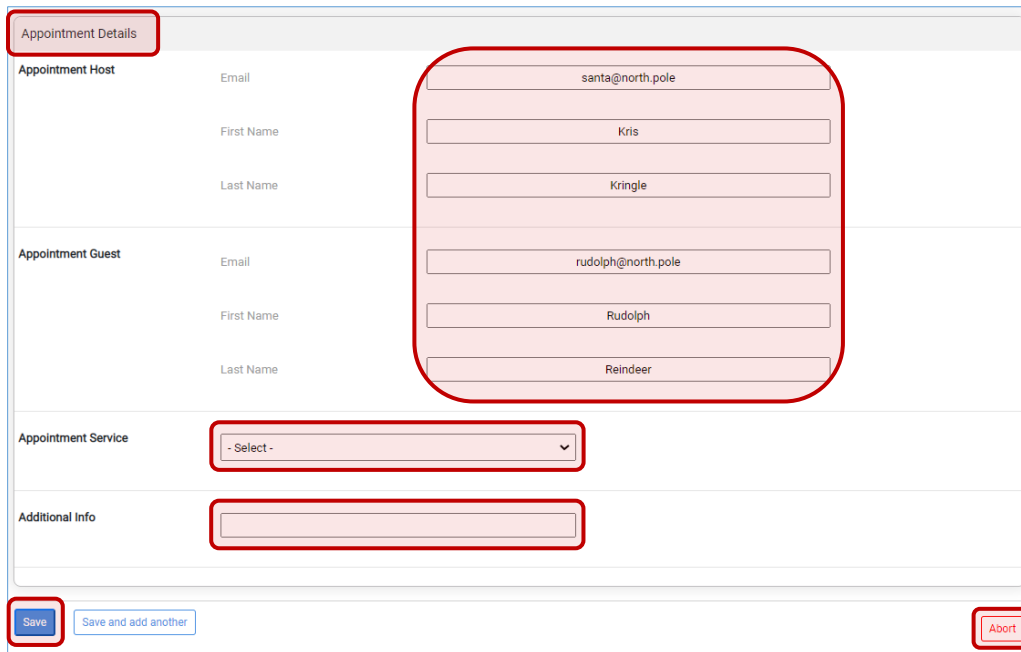
The screenshot shows the same form as Figure 27, but with a time picker open for the End Date & Time field. The time picker is a grid showing hours (08 to 02) and minutes (27 to 33). The "12:30 AM" option is selected and highlighted in blue. The "AM" button is also highlighted in blue. Below the form, there is a section titled "Appointment Details" with fields for "Appointment Host", "Email", "First Name", and "Last Name".

Figure 28: Create Appointment End Time Manually Set

## 5.2 Appointment Details

Next, the user should complete the Appointment Details section. Appointment details will include all attendees and additional details that have been defined by the scheduler organization.

When all required appointment details have been completed, click the **Save** button at in the bottom left corner of the page to create the video appointment.



Appointment Details	
Appointment Host	Email: santa@north.pole
	First Name: Kris
	Last Name: Kringle
Appointment Guest	Email: rudolph@north.pole
	First Name: Rudolph
	Last Name: Reindeer
Appointment Service	- Select -
Additional Info	
<b>Save</b> Save and add another <b>Abort</b>	

Figure 29: Create Appointment page, Appointment Details section with Attendees, Additional Details, Save Button, and Abort Button

Appointment attendees may be entered with Email, First Name, and Last Name for certain types of attendees (see figure 29). For some other types, the Host attendee value may be provided in a drop-down list for selection instead (not shown).

All appointment details, including different types of attendees and additional details, are determined by the scheduler organization. All fields will offer the user either a drop-down list (see Figure 29, “Appointment Service” field) or a text field (see Figure 29, “Additional Info” field).

Some drop-down list fields may be linked as a “parent” of another drop-down list field, meaning another drop-down list, known as a “child” list, will re-populate each time a new parent drop-down value is selected (not shown).

After clicking the **Save** button, the video appointment will be saved, and the appointment list page will load.

The new video appointment will now be available for display on the Appointment List page, with a **Status** of “Recently Created”. Note: If the user has search filters in use, or if the new video appointment is far in the future, the appointment may not appear on the currently displayed page of appointments on the appointment list page.

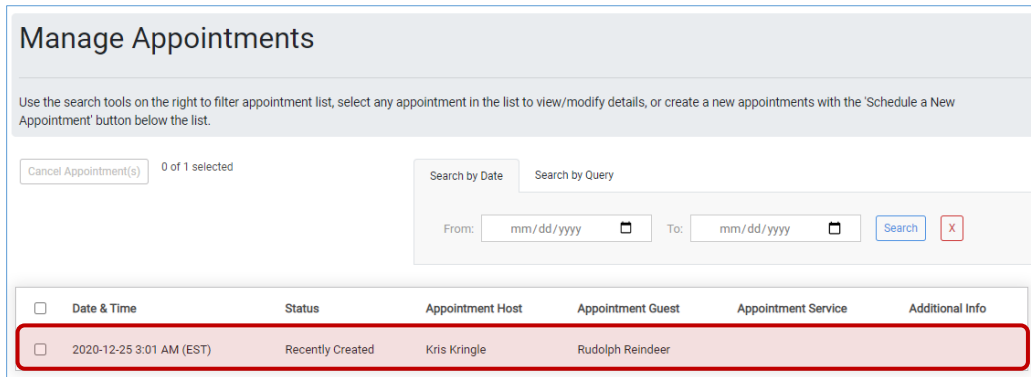


Figure 30: Create Appointment & Save Loads Appointment List Page with Recently Created Status

Once the automatic invitation emails have been sent, the video appointment will display a Status value of **Confirmed**.

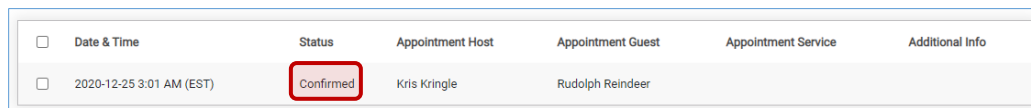


Figure 31: Video Appointment Displays with Confirmed Status After Invitation Emails Sent

### 5.3 Abort New Appointment

If the user chooses to abort or discard the new video appointment, the user should click the **Abort** button at the bottom right corner of the Create Appointment page. Clicking the **Abort** button will discard any entered values on the Create Appointment page, and the Appointment List page will load.

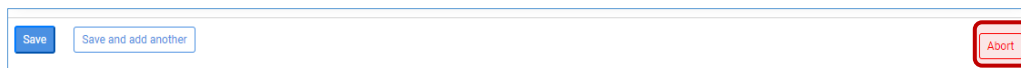


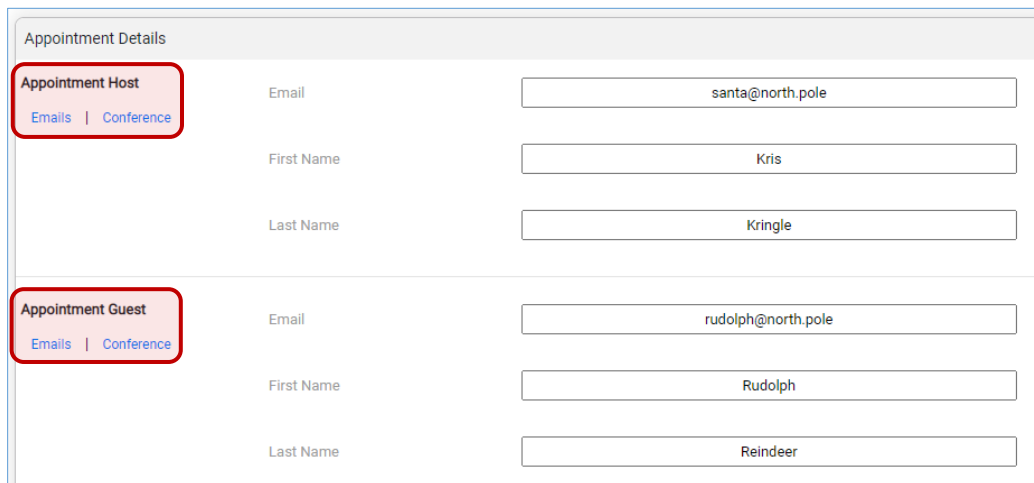
Figure 32: Create Appointment Abort and Return to Appointment List page

## 6 Manage Appointment

After navigating to the **Manage Appointment** page from the Appointment List page (by clicking any video appointment in the list), the video appointment form will load, showing all current values for the existing video appointment.

### 6.1 Attendee Information

The Manage Appointment page offers two additional links for each appointment attendee: **Emails** and **Conference**.



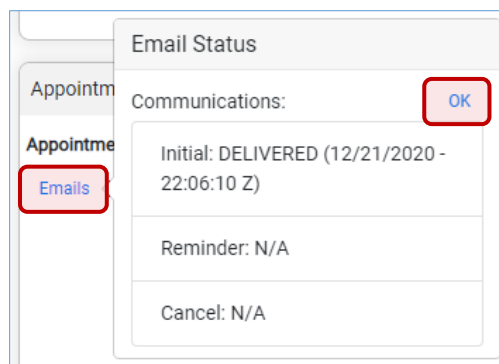
Appointment Details		
<b>Appointment Host</b> <a href="#">Emails</a>   <a href="#">Conference</a>	Email	santa@north.pole
	First Name	Kris
	Last Name	Kringle
<b>Appointment Guest</b> <a href="#">Emails</a>   <a href="#">Conference</a>	Email	rudolph@north.pole
	First Name	Rudolph
	Last Name	Reindeer

Figure 33: Manage Appointment Emails and Conference Links for Each Attendee

#### 6.1.1 Emails – Attendee Email Details

The **Emails** link for each attendee can be clicked to display details about Invitation, Reminder, No Show, and Cancel emails that may or may not have been delivered.

The email details will appear as a popover; click the **OK** button to close the popover details.



Appointment

Appointment

[Emails](#)

**Email Status**

Communications: OK

Initial: DELIVERED (12/21/2020 - 22:06:10 Z)

Reminder: N/A

Cancel: N/A

Figure 34: Manage Appointment Page, Attendee Email Details Popover



### 6.1.2 Conference – Attendee Appointment Link

The **Conference** link for each attendee can be clicked to display the Appointment Link, which is also sent in automatic emails to the attendee. The Appointment Link value will appear as a popover; click the **OK** button to close the popover details.

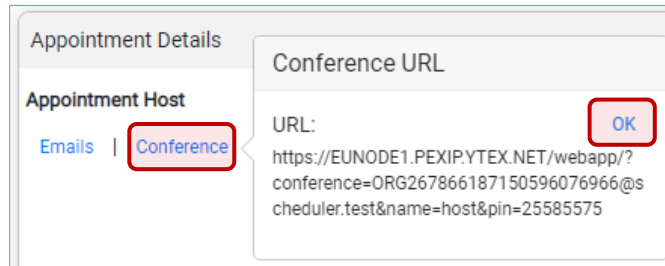


Figure 35: Manage Appointment Page, Appointment Link Popover

## 6.2 Modify Appointment

All users with access permissions to modify the video appointment (see section 1.3) will see the **Save** button in the bottom left corner of the Manage Appointment page.

The user may modify any or all video appointment form values, then click the **Save** button to apply the changes.

Modifying a video appointment will force new invitation emails to be sent to all attendees with updated video appointment details.

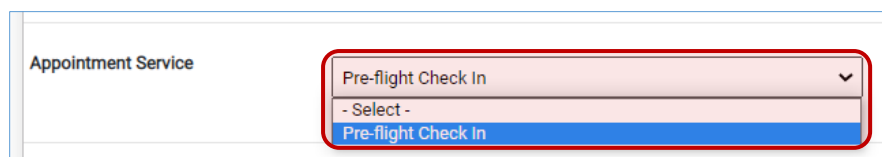


Figure 36: Manage Appointment Page, Modify Drop-down Option

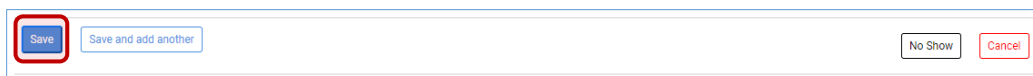


Figure 37: Manage Appointment Page, Save Button

After clicking the **Save** button, the Appointment List page will load. The updated video appointment will display on the Appointment List page with a **Status** of “Recently Updated”.

<input type="checkbox"/>	Date & Time	Status	Appointment Host	Appointment Guest	Appointment Service	Additional Info
<input type="checkbox"/>	2020-12-25 3:01 AM (EST)	Recently Updated	Kris Kringle	Rudolph Reindeer	Pre-flight Check In	updated 12/21

Figure 38: Updated Appointment Save Loads Appointment List Page, with Recently Updated Status

Note: If there are search filters in use, or if the updated video appointment is now at a different time, the updated appointment may not appear on the current page of appointments.

Once the automatic invitation emails have been re-sent, the video appointment will display a **Status** of “Confirmed”.

<input type="checkbox"/>	Date & Time	Status	Appointment Host	Appointment Guest	Appointment Service	Additional Info
<input type="checkbox"/>	2020-12-25 3:01 AM (EST)	Confirmed	Kris Kringle	Rudolph Reindeer	Pre-flight Check In	updated 12/21

Figure 39: Updated Appointment Displays with Confirmed Status After Invitation Emails Re-Sent

### 6.3 Cancel Appointment

All users with access permissions to cancel the video appointment (see section 1.3) will see the **Cancel** button in the bottom right corner of the Manage Appointment page. The user may click the **Cancel** button, which will load the **Cancel Confirmation** page.

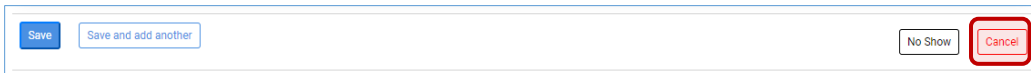


Figure 40: Manage Appointment Cancel Button

On the **Cancel Confirmation** page, click the **Yes, I’m sure** button to confirm cancelation, or click the **No, take me back** button to abort the Cancel Appointment action.

**Are you sure you want to cancel the selected Appointments?**

All of the following appointments will be canceled:

- Appointment: 2020-12-25 03:01 (EST)

Figure 41: Cancel Confirmation Page

Canceling a video appointment will force cancellation emails to be sent to all attendees with details of the cancellation.

After clicking the **Save** button, the Appointment List page will load. The canceled video appointment will display on the Appointment List page with a **Status** of “Recently Canceled”.

Once the automatic cancel emails have been sent, the canceled appointment will display a **Status** of “Canceled/Archived”.

## 6.4 No Show Appointment

All users with access permissions to modify the video appointment (see section 1.3) will see the **No Show** button in the bottom right corner of the Manage Appointment page. The user may click the **No Show** button, which will load the **No Show Confirmation** page.

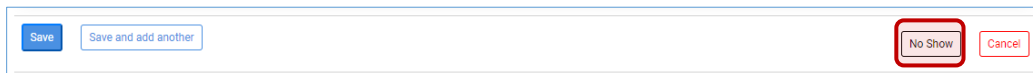


Figure 42: Manage Appointment No Show Button

On the **No Show Confirmation** page, click the **Yes, I’m sure** button to confirm setting appointment status as No Show, or click the **No, take me back** button to abort the No Show action.

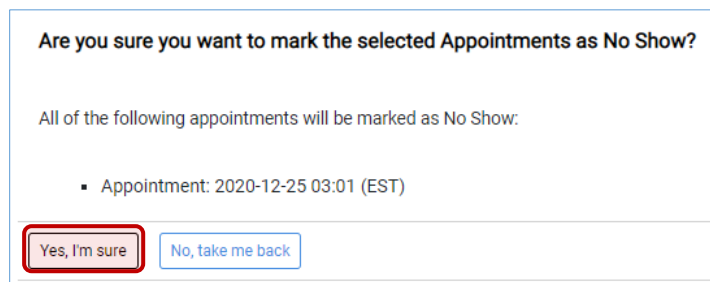


Figure 43: No Show Confirmation Page

Setting No Show status on a video appointment will force “No Show” emails to be sent to all attendees.

After clicking the **Save** button, the Appointment List page will load. The No Show video appointment will display on the Appointment List page with a **Status** of “Recently No Show”.

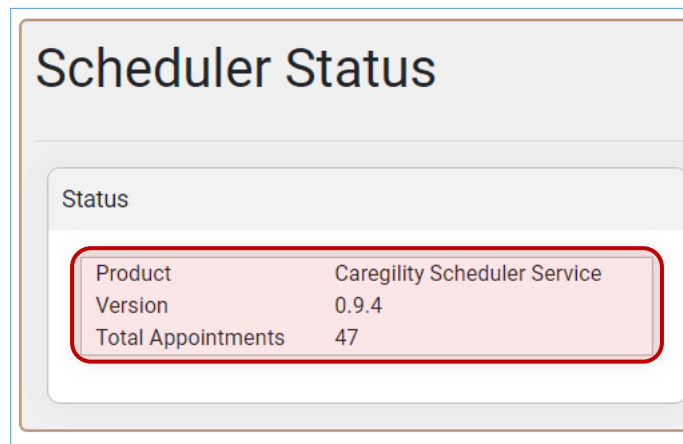
Once the automatic “No Show” emails have been sent, the No Show appointment will display a **Status** of “No Show”.

## 7 Scheduler Status

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All users may navigate to the **Status** page, by clicking the **Status** link on the navigation bar. The Status page shows basic information about the Caregility Video Scheduler, including the current software version and the total number of appointments for the scheduler organization.

Version information is valuable if you discover a bug in the system. Note: Please contact your organization administrator with any reported bugs.



The screenshot shows a web page titled "Scheduler Status". Below the title is a section labeled "Status" containing a table with the following information:

Product	Caregility Scheduler Service
Version	0.9.4
Total Appointments	47

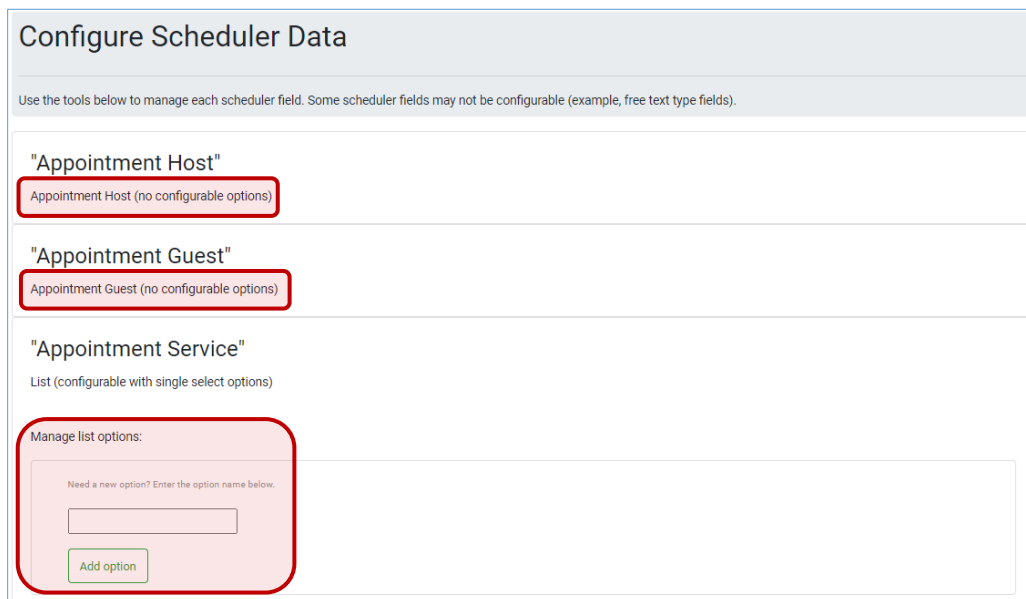
Figure 44: Scheduler Status Page

## 8 Configure Scheduler Data

Users with admin access permissions (see section 1.3) may navigate to the **Configure Scheduler Data** page by clicking the **Configure Data** link on the admin navigation bar.

The Configure Scheduler Data page allows admin level users to manage the drop-down list options that are displayed on the video appointment form.

The **Configure Scheduler Data** page will display all video appointment detail fields (this excludes time zone, start date, and end date). Any fields that allow drop-down option modification will include form controls to add and remove options. Some fields will not have any drop-down option data to manage, but will be displayed for information purposes.



The screenshot shows the "Configure Scheduler Data" page. At the top, there is a title "Configure Scheduler Data" and a subtitle "Use the tools below to manage each scheduler field. Some scheduler fields may not be configurable (example, free text type fields)." Below this, there are three sections:

- "Appointment Host"**: A red box highlights the text "Appointment Host (no configurable options)".
- "Appointment Guest"**: A red box highlights the text "Appointment Guest (no configurable options)".
- "Appointment Service"**: A red box highlights the "Manage list options:" section. This section includes a text input field with the placeholder "Need a new option? Enter the option name below." and a green "Add option" button.

Figure 45: Configure Scheduler Data Page with Configurable and Non-Configurable Fields

### 8.1 Add List Option

All configurable fields offer a text input field and **Add option** button to enable users to add drop-down list options. The **Add option** section can be found below any existing options in the **Manage list options** section.

To add a new drop-down option, the user should enter the new option value in the text input field, then click the **Add option** button.

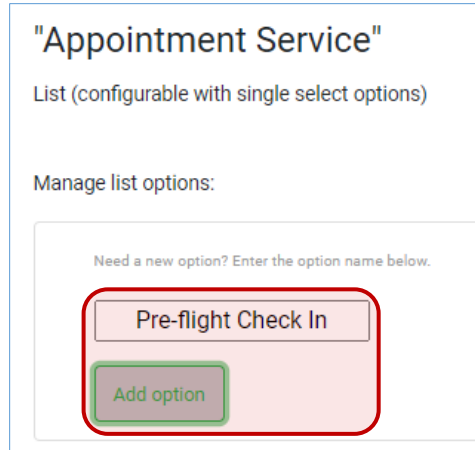


Figure 46: Configure Scheduler Data Page, List Type Field, Text Input Field and Add Option Button

After clicking the **Add option** button, the **Configure Scheduler Data** page will refresh, and the new option value will now display in the **Manage list options** section. There will also be a banner at the top of the page indicating the result of the action.

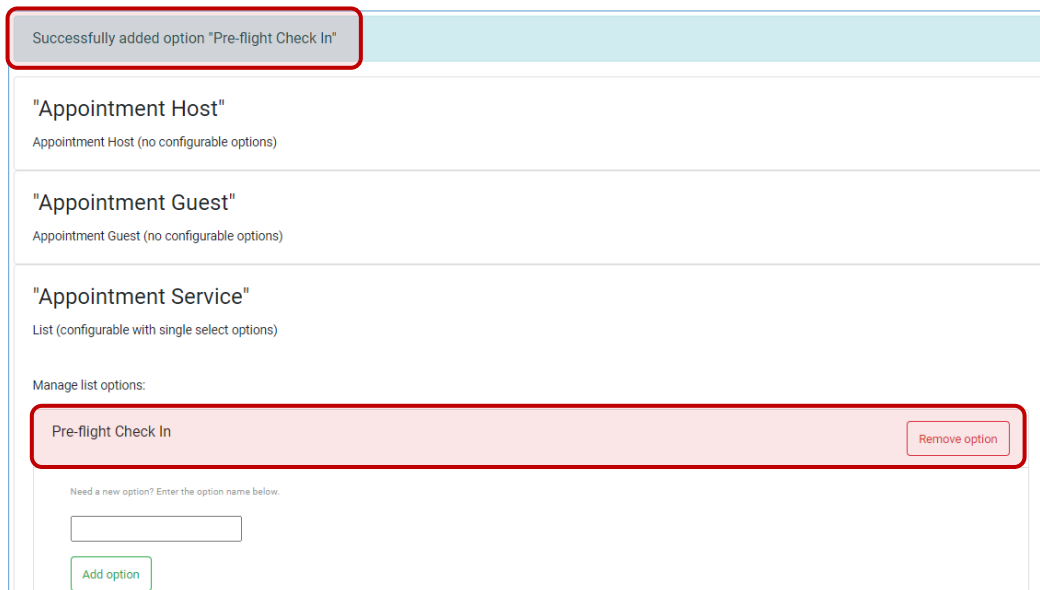


Figure 47: Configure Scheduler Data Page, List Type Field, Add List Option Shows New Value

The new option value will become immediately visible and available for selection on the **Create Appointment** and **Manage Appointment** pages.

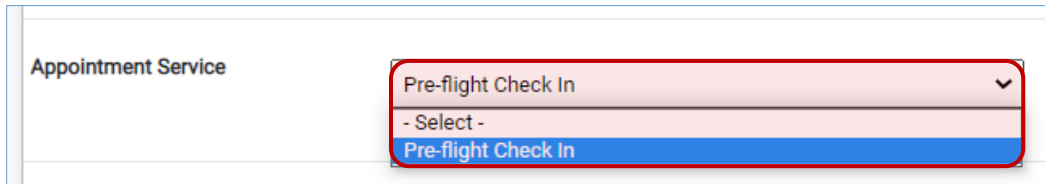


Figure 48: Added List Option Immediately Available on Manage Appointment page

## 8.2 Remove List Option

All configurable fields offer the capability of removing data options with the **Remove option** button. There will be a Remove option button for each existing option value. is located to the right of each option value in the **Manage list options** section.

To remove any single drop-down option, the user should click the **Remove option** button next to the option value.

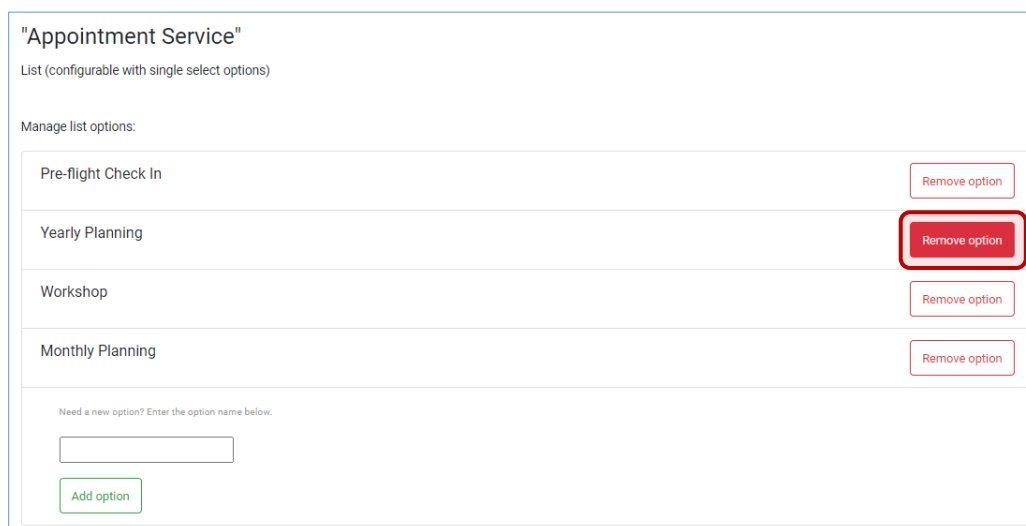


Figure 49: Configure Scheduler Data Page, List Type Field, Remove Option Button

After clicking the **Remove option** button, the **Configure Scheduler Data** page will refresh, and the removed option value will no longer display in the **Manage list options** section. There will also be a banner at the top of the page indicating the result of the action.

Successfully removed option "Yearly Planning"

**"Appointment Host"**  
Appointment Host (no configurable options)

**"Appointment Guest"**  
Appointment Guest (no configurable options)

**"Appointment Service"**  
List (configurable with single select options)

Manage list options:

Pre-flight Check In	<span style="border: 1px solid red; padding: 2px;">Remove option</span>
Workshop	<span style="border: 1px solid red; padding: 2px;">Remove option</span>
Monthly Planning	<span style="border: 1px solid red; padding: 2px;">Remove option</span>

Need a new option? Enter the option name below.

Add option

Figure 50: Configure Scheduler Data Page, List Type Field, Removed List Option Value

The removed option value will no longer be available on the **Create Appointment** and **Manage Appointment** pages in the drop-down list options. However, existing appointments will retain the removed option value.

<input type="checkbox"/>	Date & Time	Status	Appointment Host	Appointment Guest	Appointment Service	Additional Info
<input type="checkbox"/>	2020-12-25 3:01 AM (EST)	Confirmed	Kris Kringle	Rudolph Reindeer	Pre-flight Check In	updated 12/21
<input type="checkbox"/>	2020-12-26 6:00 AM (EST)	Confirmed	Kris Kringle	Buddy Elf	Yearly Planning	

Figure 51: Removed List Option Retained on Existing Appointments

### 8.3 Add Parent List Option

All Parent/Child type fields allow for the configuration of two levels of data options using the text input field, the **Add parent option**, and the **Add child option** buttons. The **Add parent option** section can be found below any existing parent and child options in the **Manage parent and child options** section.

To add new parent drop-down option, the user should enter the new parent option value in the text input field, then click the **Add parent option** button.



**"State"**

Parent List (configurable with Child List sub-options)

Manage parent and child options:

Need a new parent option? Enter the option name below.

Figure 52: Configure Scheduler Data Page, Parent List Type Field, Text Input Field and Add Parent Option Button

After clicking the **Add parent option** button, the **Configure Scheduler Data** page will refresh, and the new parent option value will now display in the **Manage list options** section. There will also be a banner at the top of the page indicating the result of the action.

Successfully added option "California"

**"State"**

Parent List (configurable with Child List sub-options)

Manage parent and child options:

California Remove parent option

---

Need a new parent option? Enter the option name below.

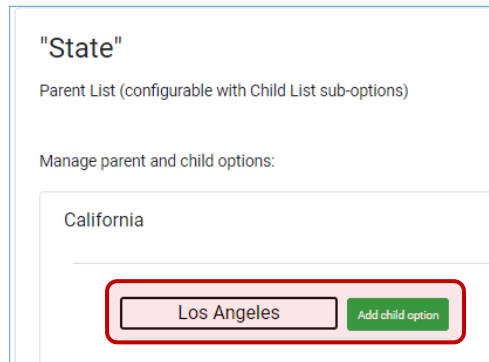
Figure 53: Configure Scheduler Data Page, Parent List Type Field, Add Parent Option Shows New Value

The new parent option value will become immediately available on the **Create Appointment** and **Manage Appointment** pages.

## 8.4 Add Child List Option

All Parent/Child type fields allow for the configuration of two levels of data options using the text input field, the **Add parent option**, and the **Add child option** buttons. The **Add child option** section can be found below each existing parent option, at the end of all existing child options in the **Manage parent and child options** section.

To add a new child drop-down option, the user should identify the correct parent option, enter the new child list option value in the appropriate text input field, then click the **Add child option** button.



The screenshot shows a configuration page for a "State" parent list. Under the heading "Manage parent and child options:", there is a list of parent options. The first parent option is "California". Below "California", there is a text input field containing "Los Angeles" and a green "Add child option" button. A red box highlights the "Los Angeles" text and the "Add child option" button.

Figure 54: Configure Scheduler Data Page, Child List Type Field, Text Input Field and Add Child Option Button

After clicking the **Add child option** button, the **Configure Scheduler Data** page will refresh, and the new child option value will be displayed below the parent option in the **Manage list options** section. There will also be a banner at the top of the page indicating the result of the action.



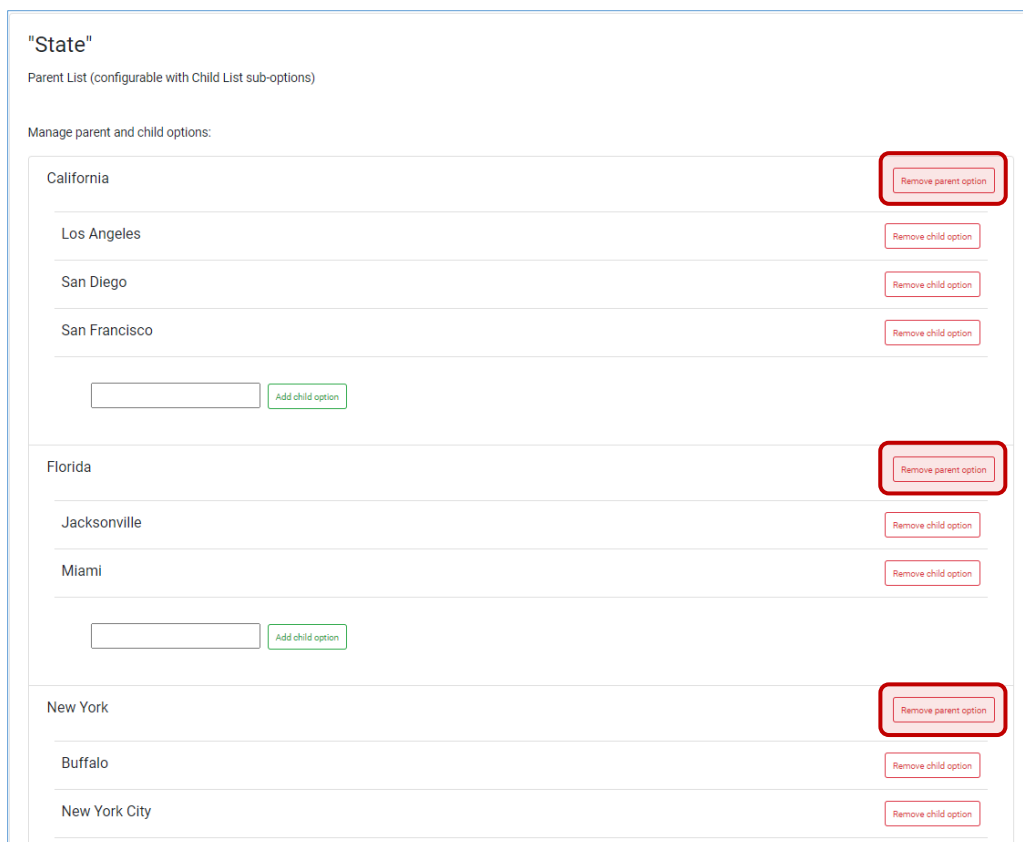
The screenshot shows the configuration page after the action. At the top, a light blue banner with a red border contains the message "Successfully added child option 'Los Angeles'". Below this, the "Manage parent and child options:" section is updated. It now shows two parent options: "California" and "Los Angeles". Under "California", there is a "Remove parent option" button. Under "Los Angeles", there is a "Remove child option" button. At the bottom of the section, there is a text input field and an "Add child option" button. A red box highlights the "California" parent option and its associated "Remove parent option" button.

Figure 55: Configure Scheduler Data Page, Child List Type Field, Add Child Option Shows New Value

The new child option value will immediately become available on the **Create Appointment** and **Manage Appointment** pages, but only as a child option when the matching parent option is first selected.

## 8.5 Remove Parent List Option

All configurable Parent/Child fields offer the capability of removing parent and/or child options with the **Remove parent option** and **Remove child option** buttons. The **Remove parent option** button is located to the right of each parent option value in the **Manage parent and child options** section. There will be a Remove parent option button for each existing parent option value.



The screenshot shows a configuration page titled "State" for a "Parent List (configurable with Child List sub-options)". Under the heading "Manage parent and child options:", there are three sections for different states: California, Florida, and New York. Each state section contains a list of parent options and their associated child options. For California, the parent options are "California", "Los Angeles", "San Diego", and "San Francisco". For Florida, they are "Florida", "Jacksonville", and "Miami". For New York, they are "New York", "Buffalo", and "New York City". Each parent option has a "Remove parent option" button to its right, which is highlighted with a red box. Below each list of parent options is an input field and an "Add child option" button.

Figure 56: Configure Scheduler Data Page, Parent List Type Field, Remove Parent Option Button for Each Parent Option

To remove any parent drop-down option, and all associated child options, the user should click the **Remove parent option** button next to the parent option value. This action will remove the **parent option and ALL child options**.

"State"

Parent List (configurable with Child List sub-options)

Manage parent and child options:

California	Remove parent option
Los Angeles	Remove child option
San Diego	Remove child option
San Francisco	Remove child option

Add child option

Figure 57: Configure Scheduler Data Page, Parent List Type Field, Remove Parent Option Button

After clicking the **Remove parent option** button, the **Configure Scheduler Data** page will refresh, and the removed parent option, as well as all child option values, will no longer display in the **Manage parent and child options** section. There will also be a banner at the top of the page indicating the result of the action.

Successfully removed option "California"

"State"

Parent List (configurable with Child List sub-options)

Manage parent and child options:

Florida	Remove parent option
Jacksonville	Remove child option
Miami	Remove child option

Add child option

New York	Remove parent option
Buffalo	Remove child option
New York City	Remove child option

Add child option

Need a new parent option? Enter the option name below.

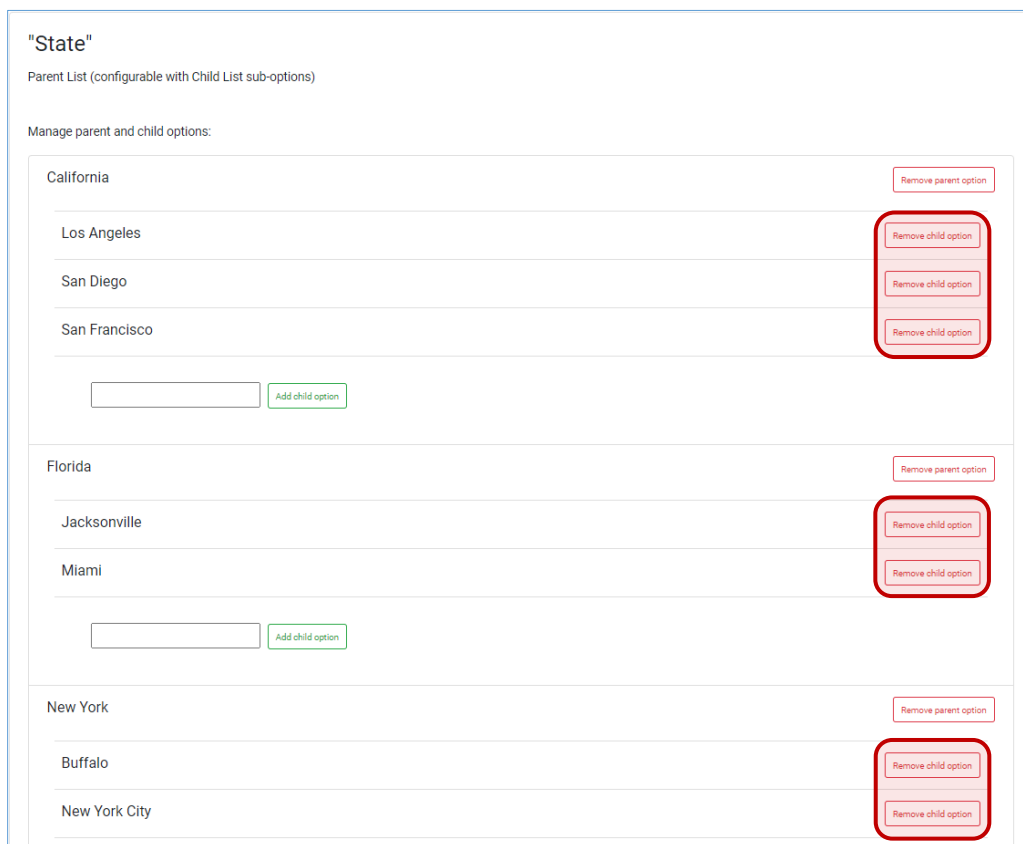
Add parent option

Figure 58: Configure Scheduler Data Page, Parent List Type Field, Removed Parent Option and All Child Option Values

The removed option values will no longer be available on the **Create Appointment** and **Manage Appointment** pages in the drop-down parent and child options. However, existing appointments will retain the removed option values.

## 8.6 Remove Child List Option

All configurable Parent/Child fields offer the capability of removing parent and/or child options with the **Remove parent option** and **Remove child option** buttons. The **Remove child option** button is located to the right of each child option value in the **Manage parent and child options** section. There will be a Remove child option button for each existing child option value.



The screenshot shows a configuration page for "State" with a section titled "Manage parent and child options:". It lists three states: California, Florida, and New York. Each state has a "Remove parent option" button. Under each state, there are child options with "Remove child option" buttons. Red boxes highlight these "Remove child option" buttons for Los Angeles, San Diego, San Francisco, Jacksonville, Miami, Buffalo, and New York City. There are also "Add child option" buttons for each state.

Figure 59: Configure Scheduler Data Page, Child List Type Field, Remove Child Option Button for Each Child Option

To remove any child drop-down option, the user should click the **Remove child option** button next to the child option value.

"State"

Parent List (configurable with Child List sub-options)

Manage parent and child options:

Florida	Remove parent option
Jacksonville	Remove child option
Miami	Remove child option

Figure 60: Configure Scheduler Data Page, Child List Type Field, Remove Child Option Button

After clicking the **Remove child option** button, the **Configure Scheduler Data** page will refresh, and the removed child option will no longer display in the **Manage parent and child options** section. There will also be a banner at the top of the page indicating the result of the action.

Successfully removed option "Jacksonville"

"State"

Parent List (configurable with Child List sub-options)

Manage parent and child options:

Florida	Remove parent option
Miami	Remove child option
<input type="text"/>	Add child option
New York	Remove parent option
Buffalo	Remove child option
New York City	Remove child option
<input type="text"/>	Add child option

Need a new parent option? Enter the option name below.

Add parent option

Figure 61: Configure Scheduler Data Page, Child List Type Field, Removed Child Option Value

The removed child option value will no longer be available on the **Create Appointment** and **Manage Appointment** pages in the drop-down parent and child options. However, existing appointments will retain the removed child option value.

## 9 Customer Support

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Please contact [techsupport@caregility.com](mailto:techsupport@caregility.com) for any questions or issues.