Welcome to Helper Setting up Calendar Exporting and Appointment Reminders

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4950 College Boulevard Overland Park, KS 66211 800.343.5737 | Fax: 888.965.4021 myaccount@helper.com The following steps will guide you through setting up and using the Calendar Export and Email Reminder options.

Setting up Helper Server Administration

Setting up The Helper Server Software. (Note: this section is only for the Server PC and on a Standalone installation. Workstation computer will not have to do this step.)

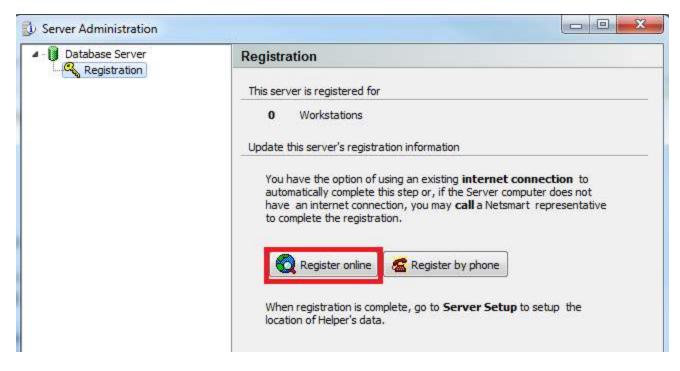
Click on the desktop icon to start the Helper Server Admin program.



If you have not been running the Network version of Helper, then you will see the following screen asking you to register.

Information	×
Register to continue Helper Serve	er administration.
	ОК

Click on OK.



Click on Register Online.

R	Register Products Online This process will use an existing internet connection to automatically register the correct amount of workstations.				
To register	products online, fill in the required information and click the Register button.				
	Zip Code				

Enter your 6-digit Helper Customer Id/Account number and 5-digit Zip Code and then click **Register**.



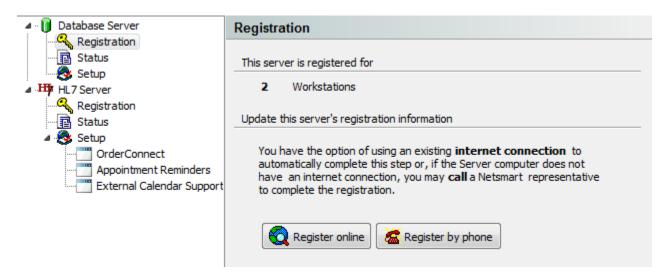
You have successfully registered the Helper Server for 2 workstations.

To complete the installation, you need to register Helper on one workstation.

OK

You should now see the above screen and click **OK**. If you do not get the above screen after clicking on Register, please email Helper Support at support@helper.com with a Subject Line of 9.1 Registration. (Note: You will not need to Register Helper on a Workstation)

You will now be at the Helper Server Administrator screen.

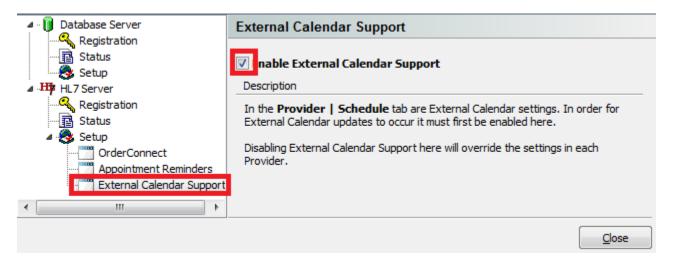


If you are going to be using the Appointment Reminder feature,

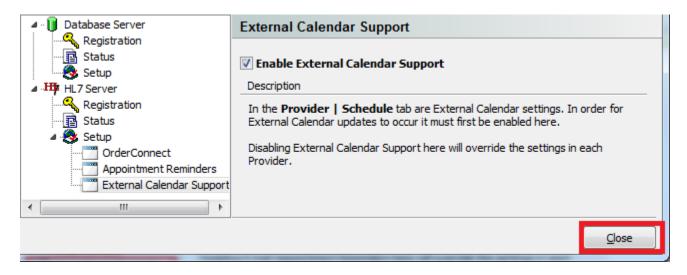


Click on **Appointment Reminders** on the left. Then click on the checkbox beside **Enable E-Mail Appointment Reminders**.

If you are going to be using Calendar Synchronizing feature,



Click on **External Calendar Support** on the left. Then click on the checkbox next to **Enable External Calendar Support**.



Click on Close.

You are now ready to start the Helper setup section.

Setting up Helper Calendar Exporting

Setting up the Helper Program to export to an External Calendar

On the main Helper screen, click on **Setup**. Select **Libraries** from the drop-down menu.

Helper v9.1.0: Bt	obbb Bbbbb Web Register He	lp Exit		
Libraries Preferences ClaimsConnee	ct	CC Ledger Medications	Billing	ERA Reports
Multi-User Set Change Passw	vord		nd healin tuning	Add Facesheet
Account #	Last Name	First Name	Active	
A	Bbbbb	Bbbbb		Progress Notes
				Account Balance
				Add Sessions
				Add Payments

Once the list of Libraries is displayed, click on **Therapists**. On the Therapists screen, select the name Therapist for which you wish to use Calendar Exporting. Then click on **Edit** on the bottom of the Window.

Accounts Facilities To search, dick in any column and begin typing			
: A Hacilities			
Insurance Companies Drag a column header here to group by that column Lawyers			
Medications I ID Status Last Name First Name MI Address 1 Addre	ss 2 City	St Zip Code	Phone
Programs A 📕 Johnson Thomas 4950 College Blvd.	Overlan	KS 6621116	i
Services	Overlan	KS 6621116	5
Scheduler Categories Priorities Other Adjustment Categories Billing Messages Methods of Payment Outcome Measures			
Places of Service 🚽 👘 Add 🎼 Edit 🖉 🔮 Print 🕼	Export		

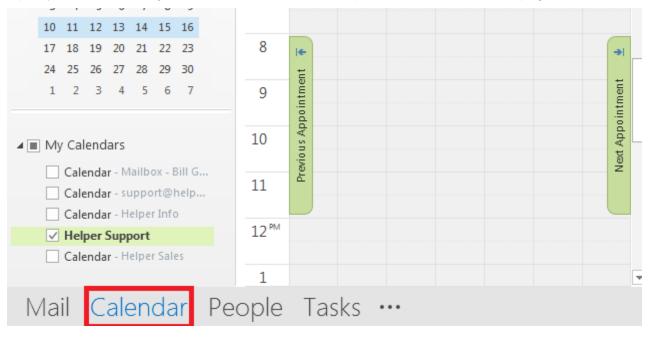
On the Therapist screen, click on the **Schedule** tab. Click on the checkbox to the left of **Enable external calendar support**. Finally, click on the link **Copy URL to Clipboard** button. You can now save this screen and proceed to set up your specific external calendar.

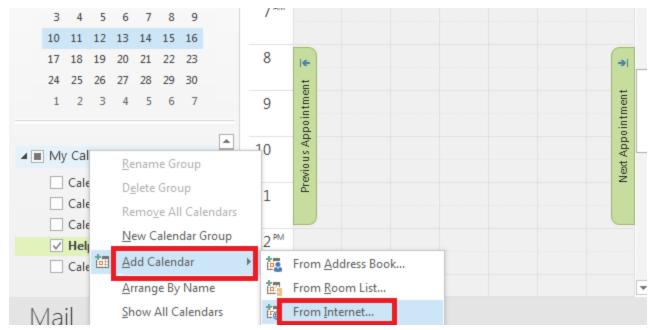
General	Claim Settings	Supervisor Sch	Schedule Credit Card Info.
The f	ollowing inform	mation is used	ed in the scheduler to identify working hours
for th	is Therapist.		Fee Schedule
		Beginnin <mark>g of d</mark> a	day: 09:00 AM
		End of da	day: 5:00 PM
exter prior	nal calendar u to the current te in your exte	sing the standa date and two r	ed to provide schedule information to an idard iCal format. When enabled, one week o months after the current date will be kept up r. Refer to your calendar application for calendar.
	nable external ca	lendar support	
	https://calsync	.netsmartcloud.co	.com/A7CAD08D-9128-4ABA-A1E0-E99D81FFB202/cal
	https://calsync	.netsmartcloud.co	Save

Setting up the Outlook Calendar

How to export using Outlook Calendar

Open your Outlook program and click the **Calendar** option at the bottom of the page.





Go to Add Calendar and select From Internet from the submenu.

On the following screen, right-click and paste the URL (this was copied from Helper) into the text box displayed below. Finally click on **OK**.

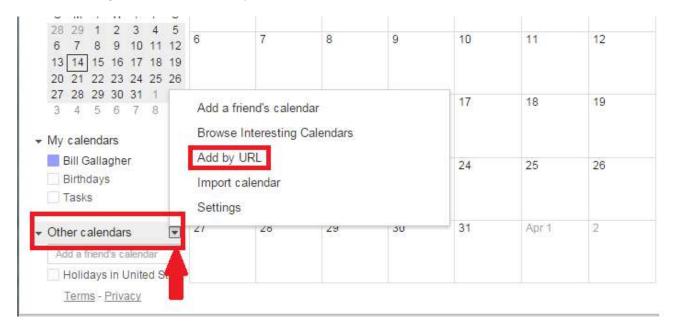
Enter the location of the interne	t calendar you want to	add to Outlook
https://calsync.netsmartcloud.co	m/A7CAD08D-9128-4/	ABA
example: webcal://www.example	.com/calendars/Calen	dar.ics
	Contraction of Contra	Cancel

You should now have access to your Helper Calendar.

Setting up a Google Calendar

How to export using the Google Calendar

Open your Google Calendar. On the left of the page go to **Other calendars**. Click on the drop-down arrow to the right and select **Add by URL** from the list.



On the following screen, paste the URL from Helper into the text box labeled **URL:** Then click on **Add Calendar**.

Add by URL

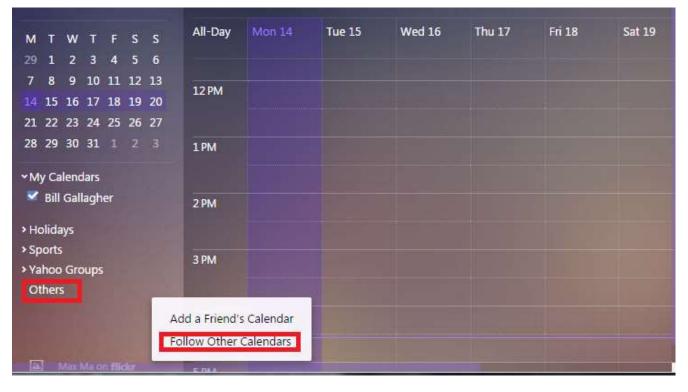
Ŧ		

URL:	https://calsync.ne	tsmartcloud.com/A7CAD08D-9128-4A
	type in the address	ress to a calendar (in iCarlonnat), you can here.
	Make the caler	ndar publicly accessible?
	Add Calendar	Cancel

Setting up a Yahoo Calendar

How to export using a Yahoo Calendar

Open your Yahoo Calendar. On the left side of the page, click on **Others** and select **Follow Other Calendars**.



From the Following screen, paste in the URL from Helper next to the text box labeled **iCal Address**. Then click on Continue

>

Helper
iCal Addres: https://calsync.netsmartcloud.com/2BA2A6CE-770
Color 🔜 🔄 🔜 🗮 🗮 🗮
Refresh Automatically v
Remind 30 minutes before
and No Reminder
Mail
Yahoo Messenger
Mobile/Desktop
Continue Cancel

Setting up calendar with an iPhone

How to export using an iPhone Calendar

First you need to copy the URL from the Therapist Library.

General	Claim Settings	Supervisor	Schedule	Credit Card Info.	
The following information is used in the scheduler to identify working hours					Extra Info
for th	nis Provider.				Fee Schedule
		Beginning o	of day: 👩	:00 AM	
		End o	of day: 5:	00 PM	
prior to da instru	to the current	date and t ernal calence orting an iC	wo month lar. Refer al calenda	al format. When enabled, one week s after the current date will be kept up to your calendar application for r.	Save
	https://calsyne	.netsmartclo	ud.com/E08	7AE1E-0D79-4D4A-8D7B-C3A68E6F4D95/cal.	
URL			APPART AND ADDRESS OF ADDRESS OF ADDRESS OF ADDRESS ADDRES		
URL			URL into you Copy URL to	ur external Calendar application	Save & <u>A</u> dd

Edit the Therapist name and go the Schedule tab. Then click on Copy URL to Clipboard.

Finally click **Save**.

Next, create an email and paste the URL into it. Send it to an email address that you can get to on the iPhone.

From the iPhone, open the email you sent. Use the iPhone copy feature to copy the URL. Go to Settings, and select **Mail, Contacts, Calendars**. From the list, select Add Account and select **Other**. Now go to **Add Subscribed Calendar**. Paste the URL in for the server location. You may see a warning regarding "Cannot Connect Using SSL". Click **Continue**. Enter a description for the calendar. Click **Next** in the upper right then save the entry.

Now, if you open the iPhone Calendar it will display your appointments. This may take a while for the initial synchronizing.

Setting up Preferences for Appt reminders

Enabling the Email Reminders Option

Setting up the Preferences Library

On the main Helper Screen,

r Helper v9.1.0: Bbbbb Bbbbb						
etup Utilities	Web Register He	lp Exit				
Libraries (Strl+L				A.	
Preferences		**				
ClaimsConne	insactions	CC Ledger Medicatio	ons Billing	ERA	Reports	
Multi-User Se Change Passy	tup	e Patients unt # 👿 SSN			dd Facesheet	
N	Se	arch				
Force columns to	fit. To se	arch, click in any colum	n and begin typing	E	dit Facesheet	
Account #	Last Name	First Name	Active 💂			
▶ A	Bbbbb	Bbbbb	V	P B	rogress Notes	

Click on Setup and select Preferences.

General	Facesheet				
	Use the following defaults when adding a new Facesheet				
Libraries Libraries Pafault Payment Adjustment Adjustment Insurance Library Scheduler Managed Care Credit Card Processing ClaimsConnect	Account:	E. A. P. Boston			
	Facility:	BSI Psychological Jonathan Barrister, JD			
	Lawyer:				
	Program:	Derry School District			
	Referring Source:	Yellow Pages			
	Referring Physician:	Reference, Kim			
	Procedure:	90834, Individual Psychotherapy			
	Therapist:	Johnson, Thomas			
	Sex:	Male Female			
	Discount Amount:	\$0.00			
	State:	Zip Code:			
	Area Code:				
	Appointment Reminders:	2 days prior to their next appointme	ent		
			_		
			-		

Click on **Facesheet** on the left. On the bottom right, enter the number of days you'd like the reminder sent prior to the appointment. Click **Save**.

Setting up a Facesheet for Appt reminders

Setting up the patient Facesheet.

<u>S</u> etup <u>U</u> tilities <u>W</u> eb	Register <u>H</u> elp	E <u>x</u> it			
Scheduler MC Auth.	Transactions <u>C</u>	C Ledger Medication	ns <u>B</u> illing	ERA	Seports
Basic Search Advance	d Search Hide F	Patients			
Last Name First N	Name 🔽 Account			Ad	ld Facesheet
Force columns to fit.	To searc	ch, click in any column	and begin typing	Ed	lit Facesheet
A E	3bbbb	Bbbbb	Active	Pro	ogress Notes
				Ac	count Balance
				Â	ld Sessions

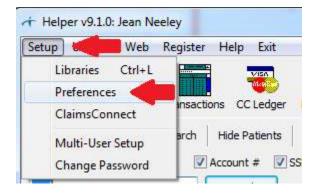
From the main Helper screen select a Patient and click on Edit Facesheet.

Patient Information: Ccccc Ccccc	X
Patient Library Links Appointment Reminders	Facesheet
If you want to send appointment reminders by email, PLEASE READ THE FOLLOWING TO THE CONSUMER	 Patient Info. Additional Resp. Parties
We can send you an appointment reminder by email. The appointment reminder will include only the date and time of your appointment and your service provider name. We will not encrypt the messages. Health care information sent by regular e-mail could be lost, delayed, intercepted, delivered to the wrong address, or arrive incomplete or corrupted. If you understand these risks and would like to receive an appointment reminder by email, I need you to confirm you accept responsibility for these risks, and will not hold us responsible for any event that occurs after we send the message. By checking the box below that enables E-mail reminders and entering an E-Mail address, you acknowledge that you have received consent from the patient.	 Attachments Insurance Info Claim Info. Insurance Co. Billing Setup Defaults Billing Access Time & Outcomes
Enable E-mail Reminders for this patient Send reminder 2 days prior to their next appointment Recipient E-mail: name@hotmai.com	Save
<u>E</u> xtra Info	Save & Copy

Click the tab at the top **Appointment Reminders**. At the bottom of the page, check the checkbox next to **Enable E-mail Reminders...** Enter the number of days prior to the appointment to send the reminder. (It will auto-fill with the setting entered in Preferences.) Enter the email address to send the reminder and click **Save**. You have set up a reminder to be sent to this patient.

Removing Favorites from Diagnosis Library

How to remove all the preselected favorites from the Diagnosis Library



On the following screen, click in **Libraries**. On the right, click on **Remove All Favorites**. This will remove the all the favorites set up in the diagnosis library for all users. Then save the Preferences.

