

Welcome to Helper Setting up Calendar Exporting and Appointment Reminders

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The following steps will guide you through setting up and using the Calendar Export and Email Reminder options.

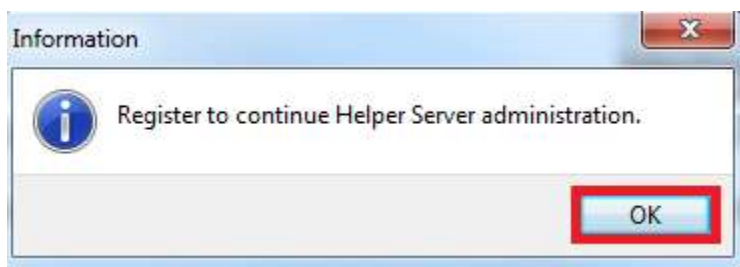
Setting up Helper Server Administration

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.



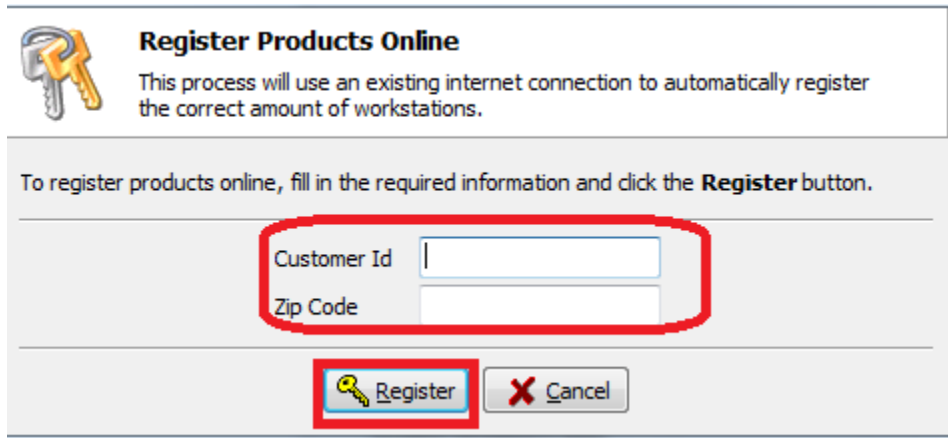
If you have not been running the Network version of Helper, then you will see the following screen asking you to register.



Click on **OK**.





Click on **Register Online**.



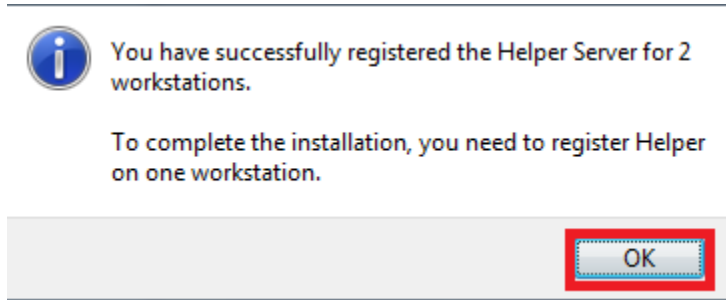
Register Products Online
 This process will use an existing internet connection to automatically register the correct amount of workstations.


To register products online, fill in the required information and click the **Register** button.

Customer Id
 Zip Code

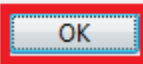
 Register 

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



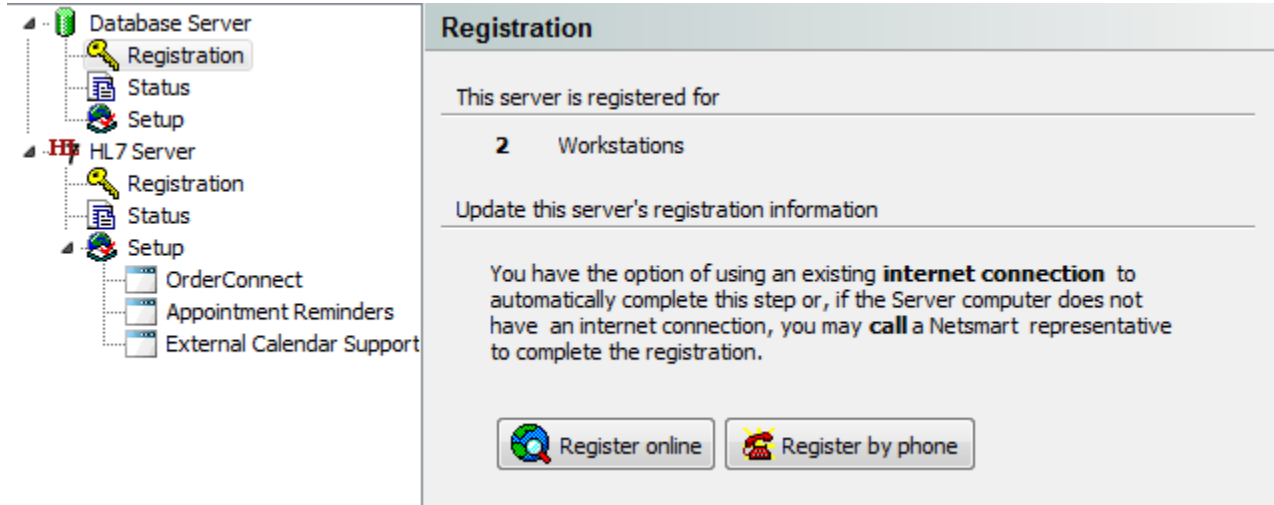
 You have successfully registered the Helper Server for 2 workstations.

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.



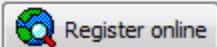
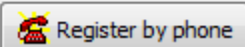
Registration

This server is registered for

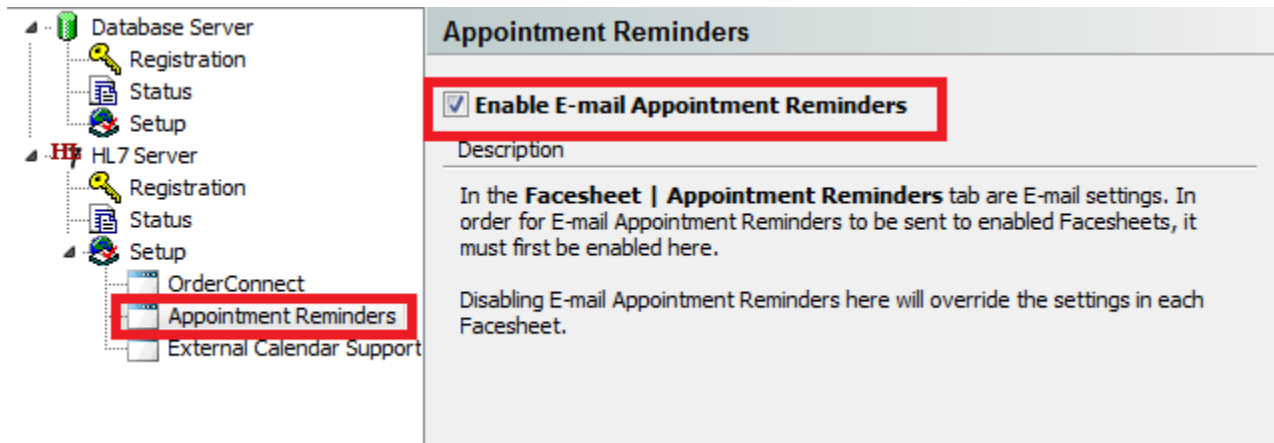
2 Workstations

Update this server's registration information

You have the option of using an existing **internet connection** to automatically complete this step or, if the Server computer does not have an internet connection, you may **call** a Netsmart representative to complete the registration.

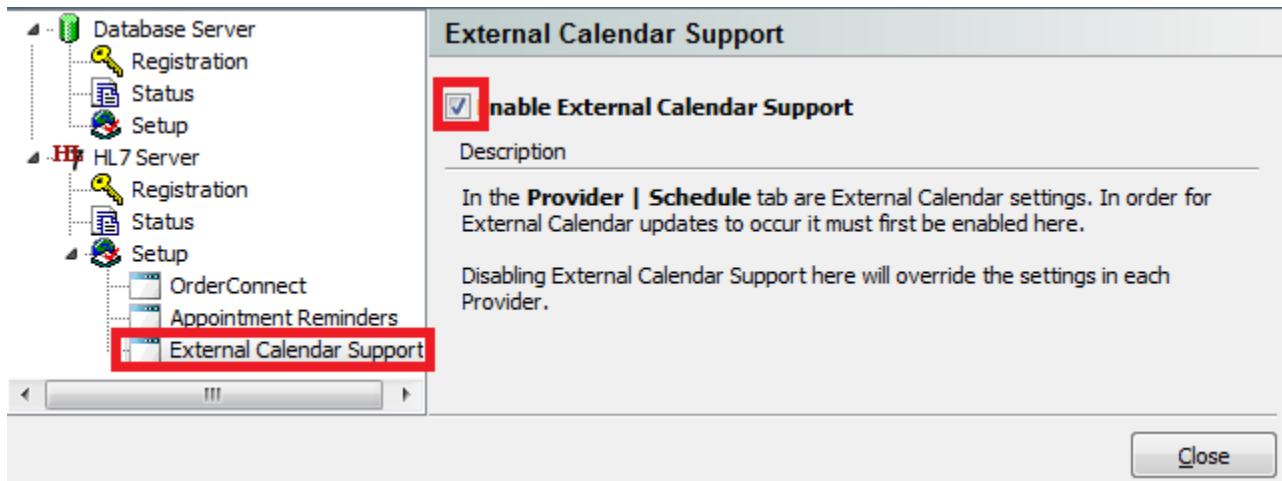
 Register online  Register by phone

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

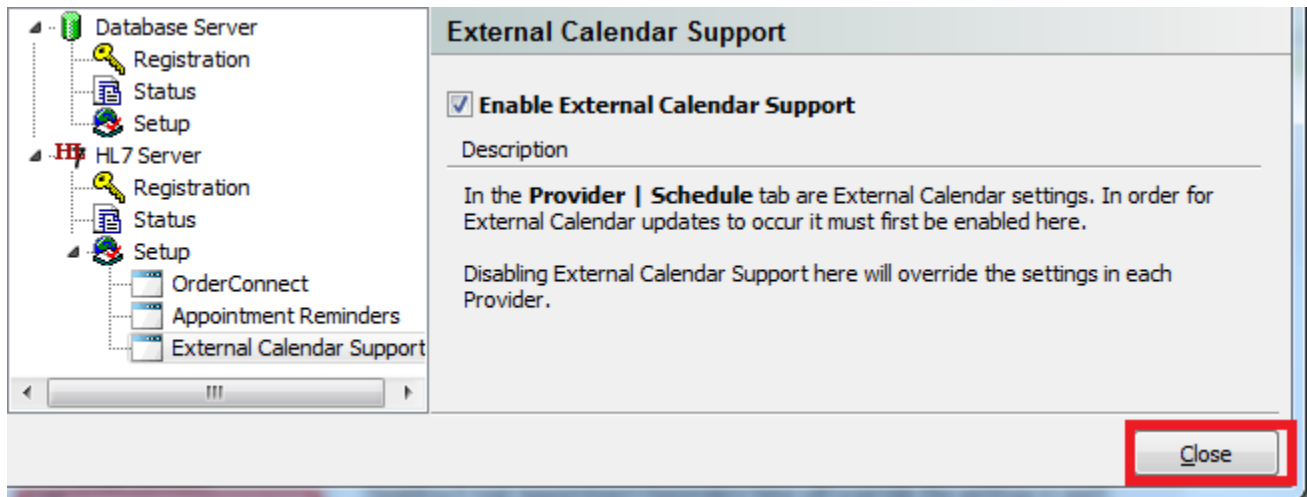


Click on **Appointment Reminders** on the left. Then click on the checkbox beside **Enable E-Mail Appointment Reminders**.

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**.



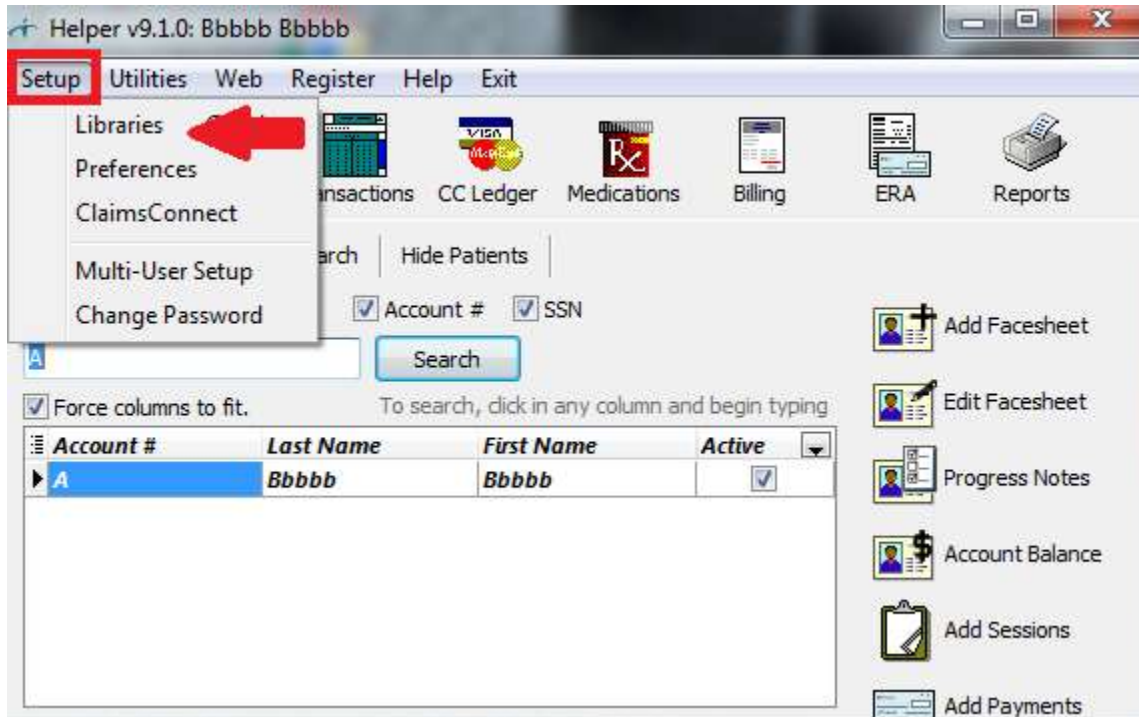
Click on **Close**.

You are now ready to start the Helper setup section.

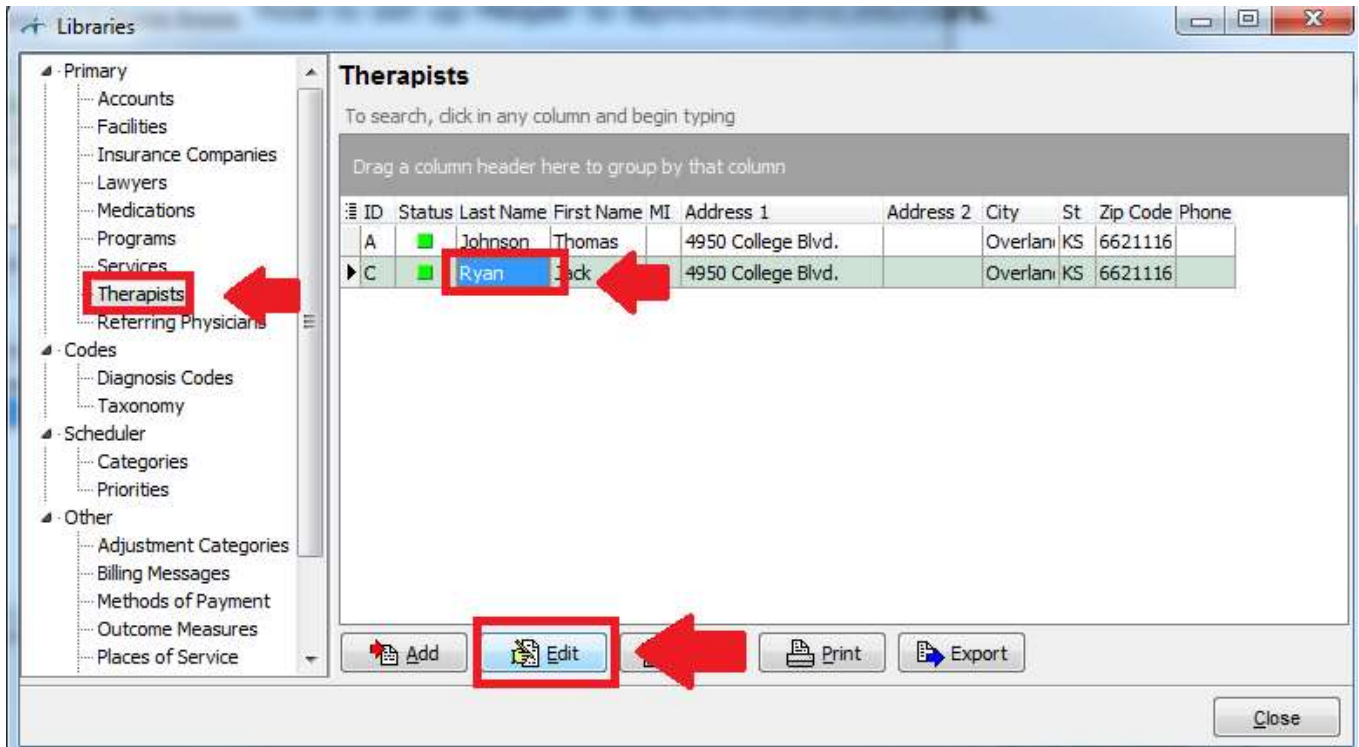
Setting up Helper Calendar Exporting

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.



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.



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.

Therapist: Jack Ryan, PhD

General | Claim Settings | Supervisor | **Schedule** | Credit Card Info.

The following information is used in the scheduler to identify **working hours** for this Therapist.

Beginning of day: 09:00 AM
End of day: 5:00 PM

The following information is used to provide schedule information to an external calendar using the standard iCal format. When enabled, one week prior to the current date and two months after the current date will be kept up to date in your external calendar. Refer to your calendar application for instructions in importing an iCal calendar.

Enable external calendar support

URL: <https://calsync.netSMARTcloud.com/A7CAD08D-9128-4ABA-A1E0-E99D81FFB202/cal>
Copy and paste the above URL into your external Calendar application

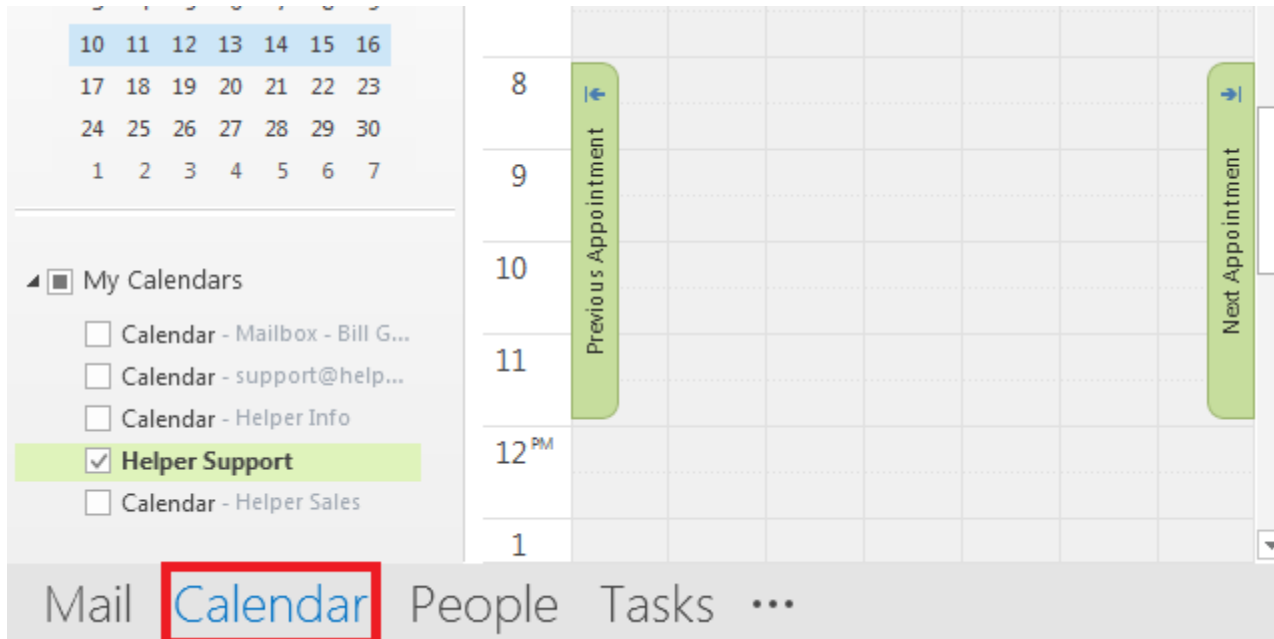
Create a new URL | **Copy URL to Clipboard**

Extra Info
Fee Schedule
Save
Save & Add
Cancel

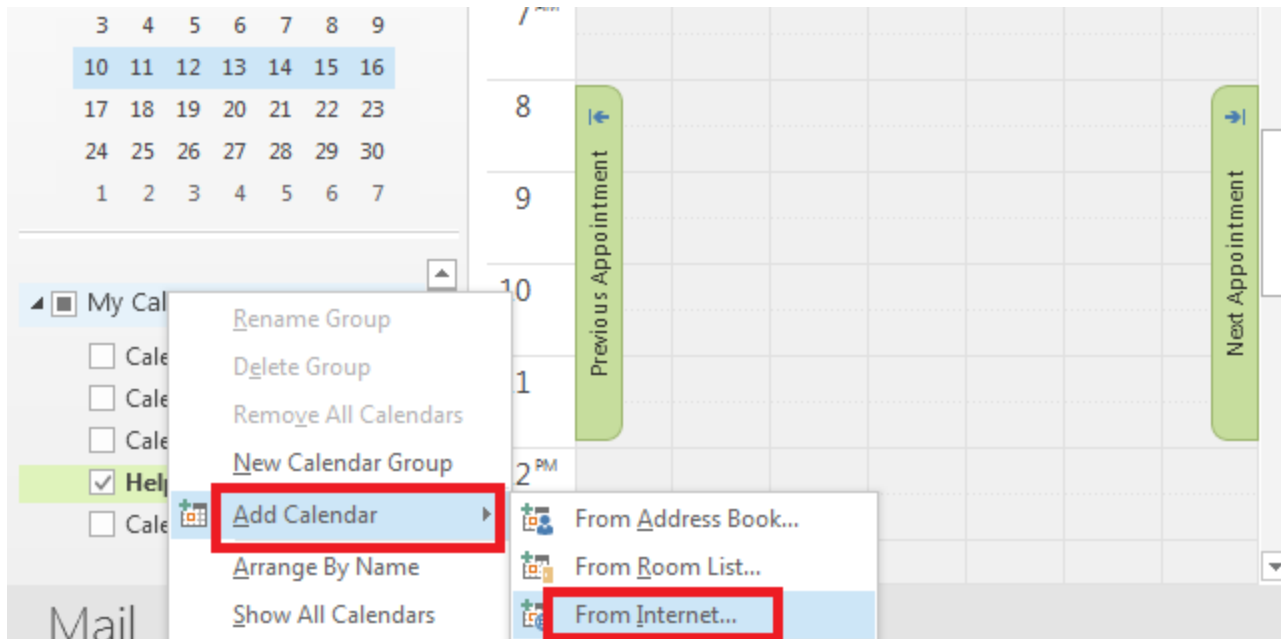
Setting up the Outlook Calendar

How to export using Outlook Calendar

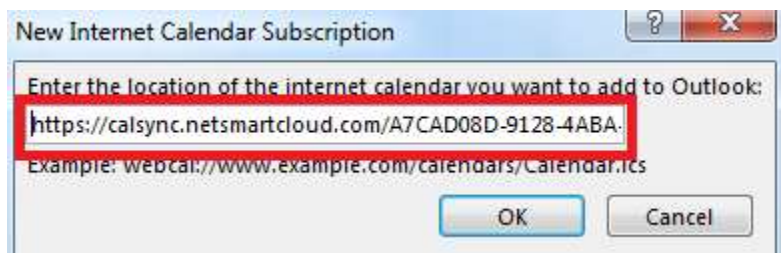
Open your Outlook program and click the **Calendar** option at the bottom of the page.



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**.

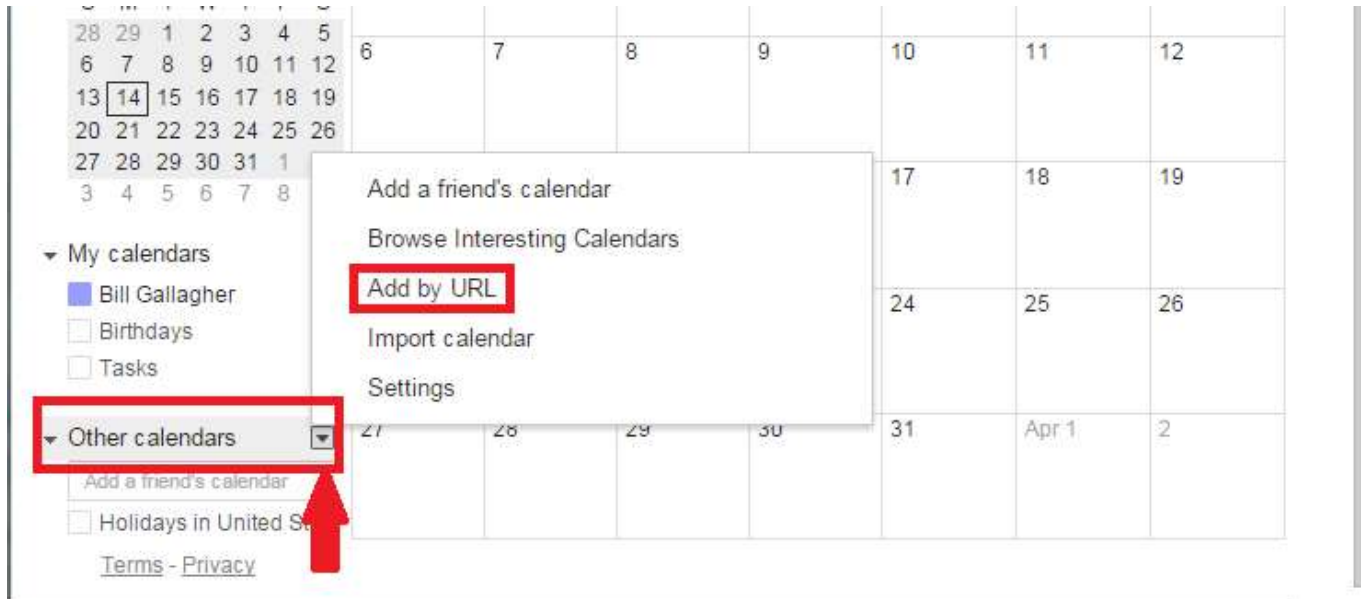


You should now have access to your Helper Calendar.

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

URL:

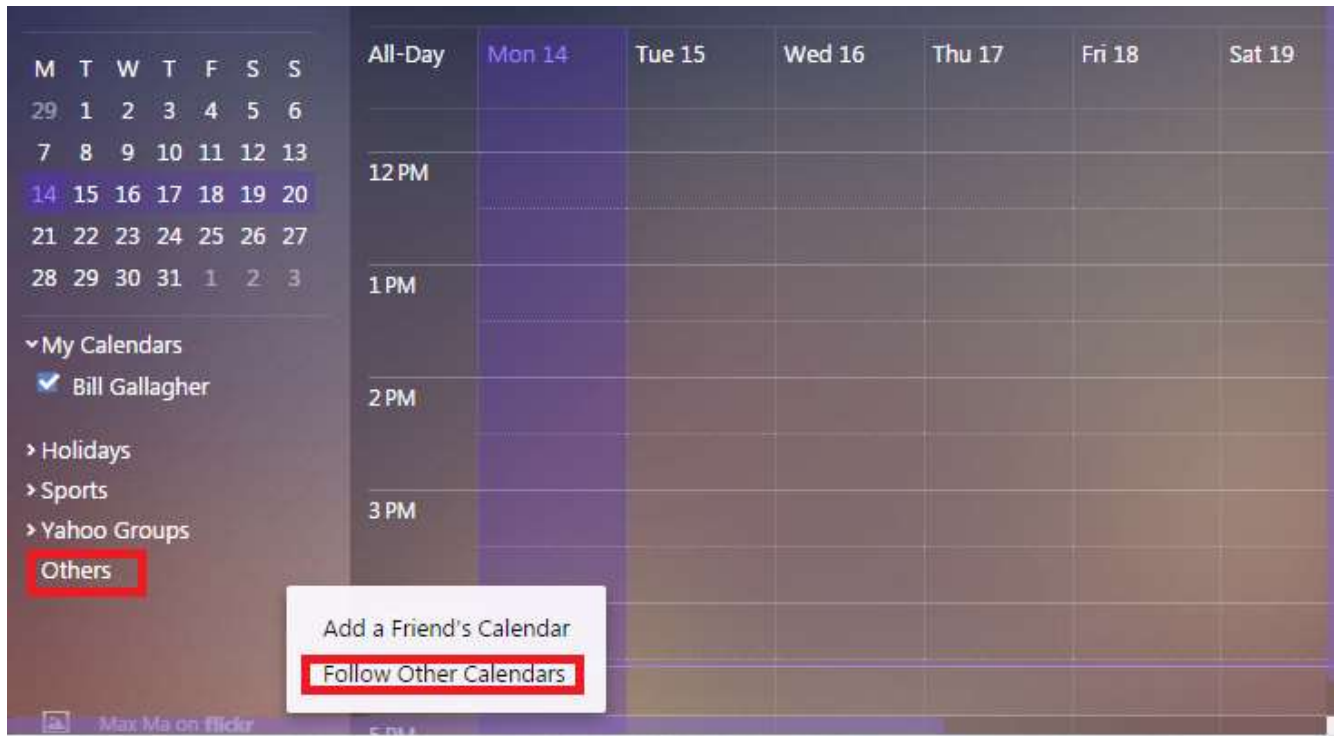
If you know the address to a calendar (in iCal format), you can type in the address here.

Make the calendar publicly accessible?

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 Address: <https://calsync.netsmartcloud.com/2BA2A6CE-77C>

Color

Refresh

Remind

and

Mail
 Yahoo Messenger
 Mobile/Desktop

Setting up calendar with an iPhone

How to export using an iPhone Calendar

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

Provider: Jack Ryan, PhD

General | Claim Settings | Supervisor | **Schedule** | Credit Card Info.

The following information is used in the scheduler to identify **working hours** for this Provider.

Beginning of day: 09:00 AM
End of day: 5:00 PM

The following information is used to provide schedule information to an external calendar using the standard iCal format. When enabled, one week prior to the current date and two months after the current date will be kept up to date in your external calendar. Refer to your calendar application for instructions in importing an iCal calendar.

Enable external calendar support

URL: <https://calsync.netSMARTcloud.com/E087AE1E-0D79-4D4A-8D7B-C3A68E6F4D95/cal>
Copy and paste the above URL into your external Calendar application

Create a... | Copy URL to Clipboard

Extra Info
Fee Schedule
Save
Save & Add
Cancel

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

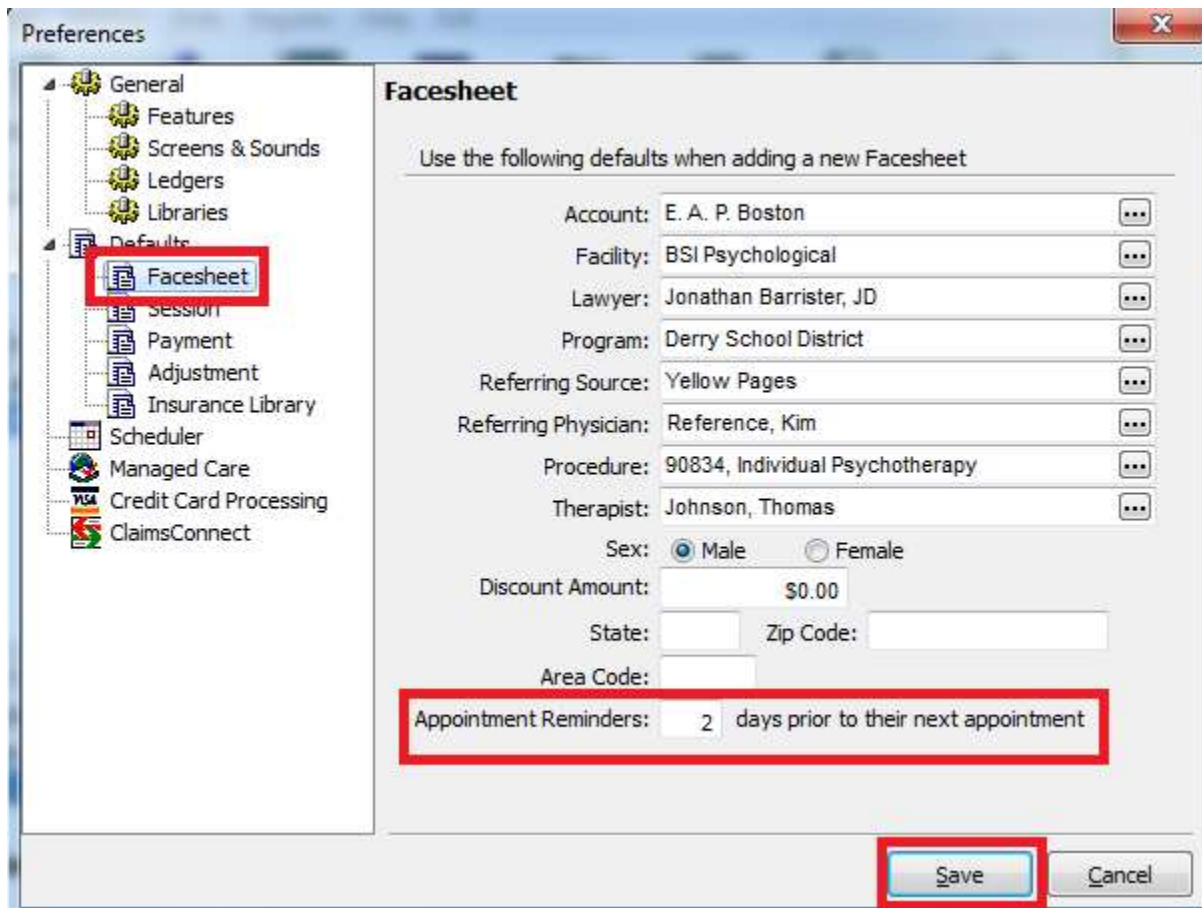
Enabling the Email Reminders Option

Setting up the Preferences Library

On the main Helper Screen,



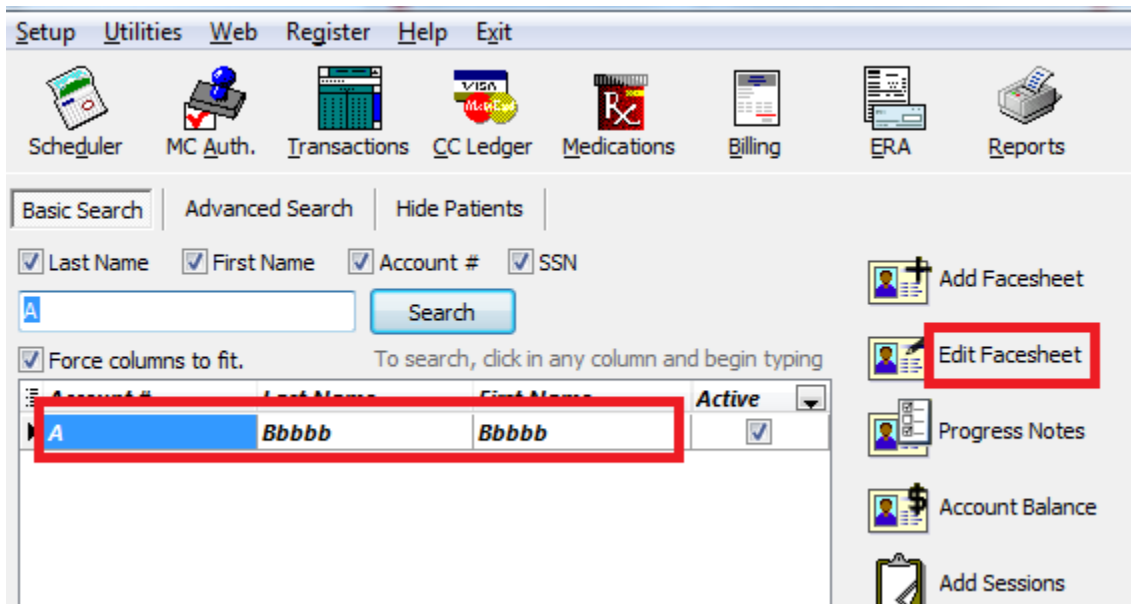
Click on **Setup** and select **Preferences**.



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.



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

Patient Information: Ccccc Ccccc

Patient | Library Links | **Appointment Reminders**

If you want to send appointment reminders by email,
PLEASE READ THE FOLLOWING TO THE CONSUMER

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.

Enable E-mail Reminders for this patient

Send reminder days prior to their next appointment

Recipient E-mail:

Save

Save & Add

Save & Copy

Cancel

Extra Info

Facesheet

Patient Info.

Additional Resp. Parties

Attachments

Insurance Info

Claim Info.

Insurance Co.

Billing Setup

Defaults

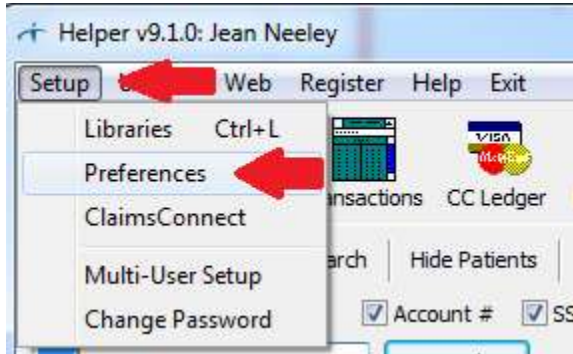
Billing

Access Time & Outcomes

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.

