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.

![Helper Server Administrator icon](image)

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

![Information window](image)

Register to continue Helper Server administration.

Click on OK.
Click on Register Online.
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.

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.
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.
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:** https://calsync.netsmartcloud.com/A7CAD08D-9128-4A

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

☐ Make the calendar 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**.

- **iCal Address**: [https://calsync.netsmartcloud.com/2BA2A6CE-77C](https://calsync.netsmartcloud.com/2BA2A6CE-77C)
- **Refresh**: Automatically
- **Remind**: 30 minutes before
- **and**: No Reminder
- **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.

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.

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.