

Help Article

1. Getting Started

API Keys

API keys connect Home Care Scheduler with your practice management software. To establish this connection:

1. Generate an API key from your practice management software.
2. Add the key to Home Care Scheduler to enable syncing.

Adding a Credit Card

To enable imports, we require you to add a credit card. Unfortunately, free trials are not available in most cases. However, you can import a small number of appointments initially to minimize costs during a trial.

2. Appointment Management

Import

Importing brings appointments from your practice management software into Home Care Scheduler.

- **Manual Import:** Ideal for syncing specific appointments with more control.
- **Automatic Import:**
 - **Daily Import:** Available by default for regular syncing.
 - **Premium Import:** Updates every five minutes for premium accounts.

First Import Tip: Before performing your first import, update your sync settings to define your home visit defaults.

Export

Exporting sends updated appointment details from Home Care Scheduler back to your practice management software. **Use caution**, as this modifies data in the original system.

3. Routing & Optimization

Routes

Routes group appointments to optimize travel and arrival times using Google Maps. Each route requires:

- **Starting Location:** Use the first appointment address or a custom address (e.g., practitioner's location).
- **Starting Time:** Set manually or use the first appointment time.

Routes can be created individually or in bulk.

Routed vs. Unrouted Appointments

- **Routed Appointments:** Assigned to a route for a single practitioner on a specific day.
- **Unrouted Appointments:** Not assigned to a route or removed due to changes in the practice management software.

Note: Appointments without valid addresses cannot be routed.

Route & Optimization Settings

Enhance route efficiency with these settings:

- **Order:** Keep the original order or optimize for shortest travel time.
- **Start Time:** Use the first appointment or set manually.
- **Start Location:** Choose between the first appointment address or practitioner's default address.
- **Breaks:** Add breaks (e.g., 30 minutes after every four appointments).

Bulk Route and Optimization

For large teams, use the bulk route and optimization feature to manage schedules efficiently:

- Create multiple routes for selected practitioners on a specific day.
- Apply consistent settings (e.g., breaks, optimized appointment order) with a single click.

Zero Travel to First Appointment

By default, travel distance to the first appointment is set to zero, aligning with Australian Taxation Office and Health Professional Support Award guidelines. If charging for this travel, manage it within your practice management software.

Nearby Search

The nearby search tool helps allocate patients to the most suitable practitioners by showing:

- Practitioners with appointments near a patient's location.
 - Outlier appointments to optimize travel schedules.
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4. Practitioner Management

Practitioner Settings

Add practitioners' email addresses and default geographic locations to streamline route optimization. Enable daily notifications to send practitioners a morning summary of their appointments and travel details.

5. System Settings

Sync Settings

Sync settings ensure only home visit appointments are imported. Configure:

- **Business Locations**
 - **Practitioners**
 - **Appointment Types:** Keep home visit appointments separate from clinic appointments for easier management.
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6. User Roles & Access

User Levels

Home Care Scheduler offers three user roles:

1. **Admin:** Full access for account owners.
 2. **Non-Admin:** Access to all features except setup settings.
 3. **Practitioner:** Limited access to view and manage assigned calendars.
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7. Managing Subscriptions and Integrations

Cancel Subscription

To cancel your subscription:

1. Go to **Settings > Subscription**.
2. Delete your credit card details.

Cancel Integration

To disconnect your practice management software:

1. Navigate to the **Provider Account** page.

2. Disconnect the API key to stop syncing data.
For security, delete the API key from your practice management software.
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8. Travel Calculations

Travel Time and Distance

The app calculates travel times and distances between appointments using Google Maps. While it accounts for traffic conditions, we recommend adding buffer time for accuracy.