



Acuity Scheduler Instructions for Level 2 Counsellors

These instructions are for new users to the Acuity platform to assist with initial setup. Acuity has extensive tutorials and help which make it redundant to attempt to add too much detail into these notes. Links to the Acuity website are added where appropriate and it is suggested that you familiarise yourself with the platform by browsing the index or using the search function [here](#).

Becoming a User

1. AMINDSET will initially register you onto the Acuity site as a user - you will be sent the username and password.
2. Please change the password as it will just be a simple one. Login [here](#).
3. Your access level will be View and Edit.
4. You will already have a calendar assigned to you which will be your personal calendar for appointments and setting availability.
5. After logging on, you will be at the appointment calendar page which will, of course, be empty.
6. Note that at the top of every page is a link for help.
7. You can play with the various buttons to select your view and get a feel for the program.
8. This appointment calendar will display all of your appointments.
9. At the top of the page is a useful button: 'New'. This allows you to schedule a client for a particular appointment and might be used often - particularly at first as you both get used to the booking system.
10. The same is achieved by clicking in the calendar at the time slot you wish to book.
11. Your client will receive an email about the appointment and there will be links to pay for the session, cancel or reschedule. Each of these will generate information emails. Clients must pay before the session, so it is important that they are aware that the confirmation email has a direct link to Acuity to facilitate this.
12. Clients will also receive a reminder email 24 hrs before the appointment.
13. 'Block' is for blocking off appointment times for particular days - but, it is not appropriate for our bookings and messes the calendar - please do not use!

Appointments

Clients

1. Select 'Clients' from the sidebar and a list of clients appears.
2. Here you can add your own clients and they will add themselves by filling in the booking details

Business Settings

Availability

1. Select the 'expanded' view at the top right of the calendar list
2. Setting your availability is the most important part of the setup as it defines when clients will be able to book an appointment with you for say, online or F2F counselling. Your appointment types will already be set up in groups ready for setting up your availabilities for each group. Contact Roger if you would like changes to these groups or appointment types or if you have any questions about any aspect of this setup.
3. 'Edit Group' will show the other appointment types in the group at present and allow you to choose which appointment types are grouped together.
4. For each group, set your availability by selecting 'Edit Availability/Limits'.
5. The upper availability setup table is for your regular hours. If you are available at mostly the same times each week, it saves a lot of effort to have them in this table and they will repeat every week. So click on 'This service group has regular hours every week' and add your hours. The editing is very friendly and responds to inputs like 3-4 and guesses the times.
6. For holidays or one-off changes then you only have to amend the lower, or 'over-ride hours for specific days' table for the specific day and time of the change.
7. If you cannot add regular hours, you can untick the 'This group has regular hours....' And just use the lower table. But this will be hard work as every single day will need filling in.
8. The regular hour method is recommended. But, remember to fill in any changes every week into the lower table.
9. You may also set different times for different appointment types. Just click, 'Set different hours for certain Appointment Types'.
10. The program will not double book the rooms. So you may get no availability though you know both the client and counsellor are free - it means someone else has booked the room.
11. Don't forget to SAVE with each change.
12. Client Scheduling limits are included with Availability. This is to set limits on how close to an appointment it can be booked or changed by the client, how far ahead bookings are accepted etc. These are preset and form part of our T&Cs for clients. The main one is that changes, rescheduling and cancellations must be made at least 24 hours before the booked appointment or full payment will be required.
13. Full payment must always be made during the booking process for the booking to be finalised.

Sync with other Calendars

1. This is for syncing with the calendar on your own computer - just follow the instructions for your particular software.
2. There is an Acuity Scheduler App for your phone which is very useful both for you and your clients and will help you with your scheduling on the go.
3. Please encourage your clients to download and become familiar with this App - it is very good.

Email Settings

1. Here you can choose whether and how often to get appointment summaries by email.
2. You will still receive the usual confirmation, cancellation and rescheduling type emails.

Remember that the Acuity help is excellent.

Please email me if you have any problems, but do take time to read through these instructions and look at the Acuity help tutorials and FAQs before contacting us.

AMINDSET TEAMB