How to edit: “Scheduled Activities”

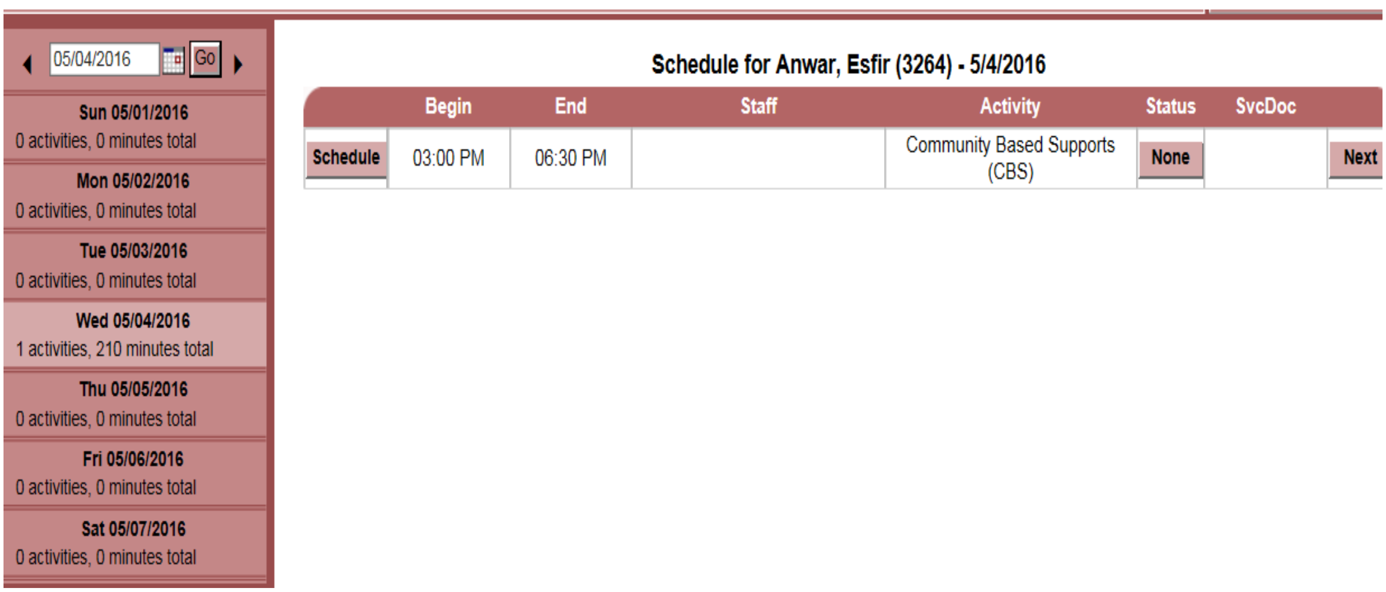
Once an activity (service) is scheduled, it appears on the staff member’s **Schedule.** There are several features on the **Schedule** page that enable the user to work with the activity after it is scheduled.

EDITING SCHEDULED ACTIVITIES

Once an activity is scheduled, the details of the activity can be edited as long as the status of the activity has not been marked. This applies to all three types of activities: client, group, and staff.

Staff members who have access to multiple child organizations are able to view all of their scheduled activities in the **Schedule**. However, only activities scheduled at the organization currently logged into can be modified. Activities that are scheduled at other organizations appear in read-only mode. In order to modify these activities, the staff member must log into the appropriate organization.

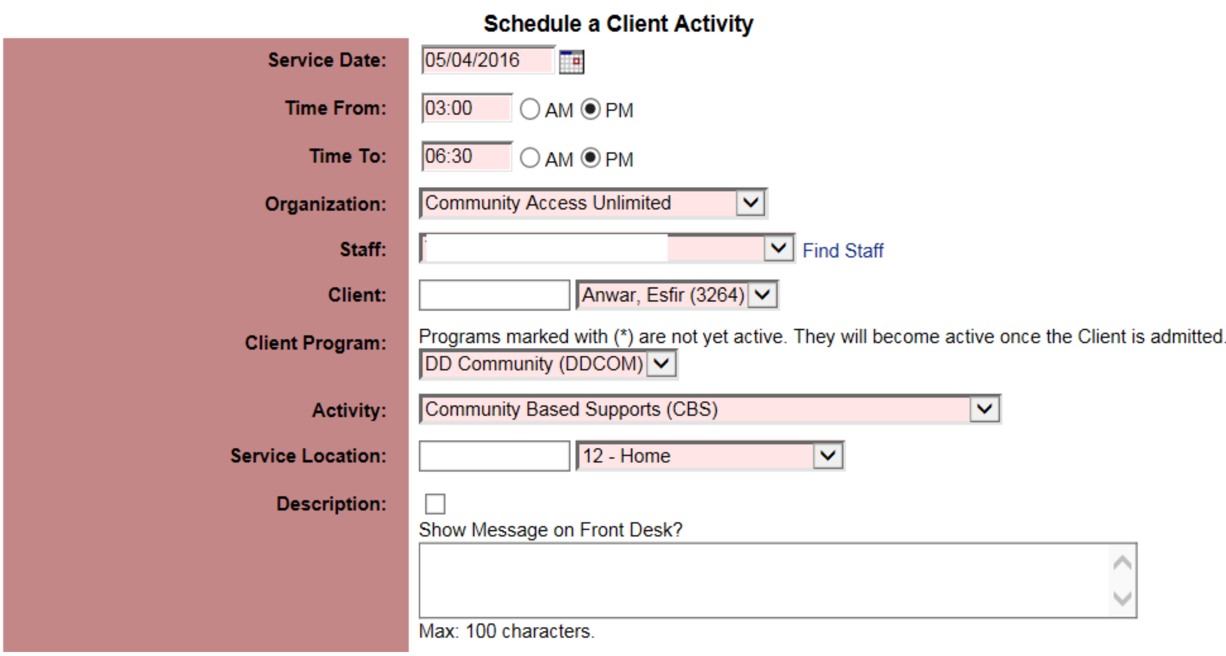
STEP 1: Navigate **to Schedule** and click the **Schedule** button of the activity needing to be edited.



carelogic

How to edit: “Scheduled Activities” (Cont.)

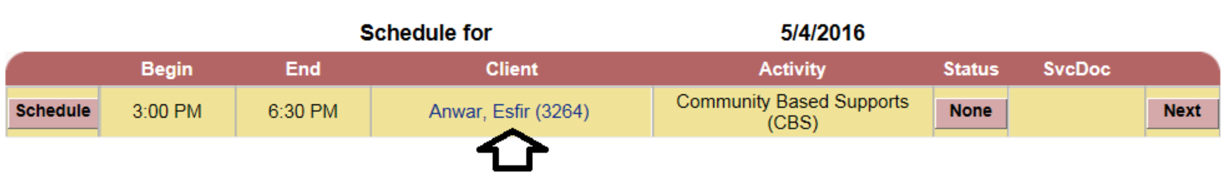
STEP 2: Make the desired edits to the scheduled activity and click **Submit.**



Viewing Client Information

It’s possible to view a client’s **ECR** from the **Schedule** as long as they are scheduled for an activity.

STEP 1: Navigate to **Schedule.**



STEP 2: Click the name of the client whose information is needed. The **ECR** for the selected client appears. (See the **Client Guide** for information about the **ECR.**)