

# NextStep

## Schedule based on attributes and availability

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### About

You can search for an available appointment based on attributes users (resources) assign to themselves.

### Set up Resource Attributes (Administrator)

You can set up attributes that users can opt into for scheduling. To set up the available attributes

1. Navigate to the Scheduler in NextStep Clinical: **Menu > Scheduler**.
2. Click Setup



3. Click Resource Attributes to edit the attributes available to users and on the schedule

The screenshot shows the 'Scheduler Setup' window with the 'Resource Attributes' section selected in the left-hand navigation menu. The main area displays a grid of attributes with columns for 'Caption', 'Type', and 'Dropdown Choices'. Each row has a checkbox in the first column. Below the grid are buttons for 'Preview changes', 'Save changes', and 'Cancel changes'. At the bottom right of the window are 'Save' and 'Close' buttons.

	Caption	Type	Dropdown Choices
<input checked="" type="checkbox"/>	Race	CHECKED-DROPDOWN	White, African American, Latino, Asian
<input checked="" type="checkbox"/>	Specialty	CHECKED-DROPDOWN	Family Services, SUD, Relationship Counseling
<input checked="" type="checkbox"/>	Sex	DROPDOWN	Male, Female, Unknown
<input checked="" type="checkbox"/>	Gender Identity	DROPDOWN	Male, Female, Trans Man, Trans Woman, Genderqueer
<input checked="" type="checkbox"/>	Pronouns	DROPDOWN	He/Him, She/Her, They/Them
<input checked="" type="checkbox"/>	Orientation	DROPDOWN	Homosexual, Heterosexual, Bisexual, Other



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4. Click the **New** button to create new options.
5. Add a **Caption** for the attribute, a **Type**, like "DROPDOWN", and, if a DROPDOWN, a comma-separated list of choices. CHECKED-DROPDOWN lets the user select one or more values.

These attributes then become available in the user's account settings and the Scheduler's appointment settings.

## Set the values of your attributes for scheduling (User)

To set the values for the Resource Attributes to be used when scheduling, follow these steps:

1. Navigate to your Account Settings in NextStep Clinical: **Menu > Account Settings**
2. Scroll down to the **SCHEDULER RESOURCE ATTRIBUTES** section

### SCHEDULER RESOURCE ATTRIBUTES

Opt into a given attribute to allow staff to search users with that attribute.

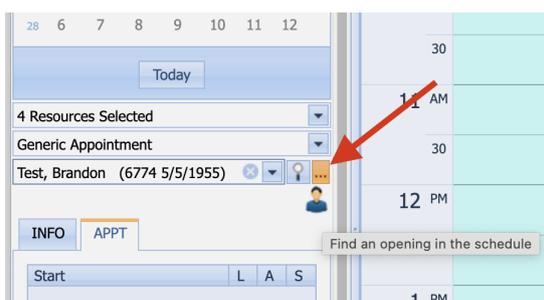
Race	White
Specialty	Family Services
Sex	Male
Gender Identity	Male
Pronouns	He/Him
Orientation	Heterosexual

3. Enter the values of the attributes you would like to be associated with you when a user is searching for an appointment based on a client's preferences.
4. Click the **Update** button to save your changes.

## Use Resource Attributes to select an appointment (Scheduler)

To select an appointment using Resource Attributes:

1. Navigate to the Scheduler in NextStep Clinical: **Menu > Scheduler**.
2. Choose a Client
3. Click the **ellipsis button** to the right of the Client name



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4. In the **Find an opening in the schedule** panel, select the Attributes you want to limit resources to and the Values of those Attributes you want to select.

Apply	Attribute		Value
<input type="checkbox"/>	Race	<input type="radio"/> Is <input type="radio"/> Is Not	
<input checked="" type="checkbox"/>	Specialty	<input checked="" type="radio"/> Is <input type="radio"/> Is Not	Family Services, Relati
<input checked="" type="checkbox"/>	Sex	<input checked="" type="radio"/> Is <input type="radio"/> Is Not	Female
<input type="checkbox"/>	Gender Identity	<input type="radio"/> Is <input type="radio"/> Is Not	
<input type="checkbox"/>	Pronouns	<input type="radio"/> Is <input type="radio"/> Is Not	
<input type="checkbox"/>	Orientation	<input type="radio"/> Is <input type="radio"/> Is Not	

Select Matching Resources

5. Click the **Select Matching Resources** button to filter the resources that match those values.
6. The resulting available appointments will display in the list at the bottom that you can choose from.

