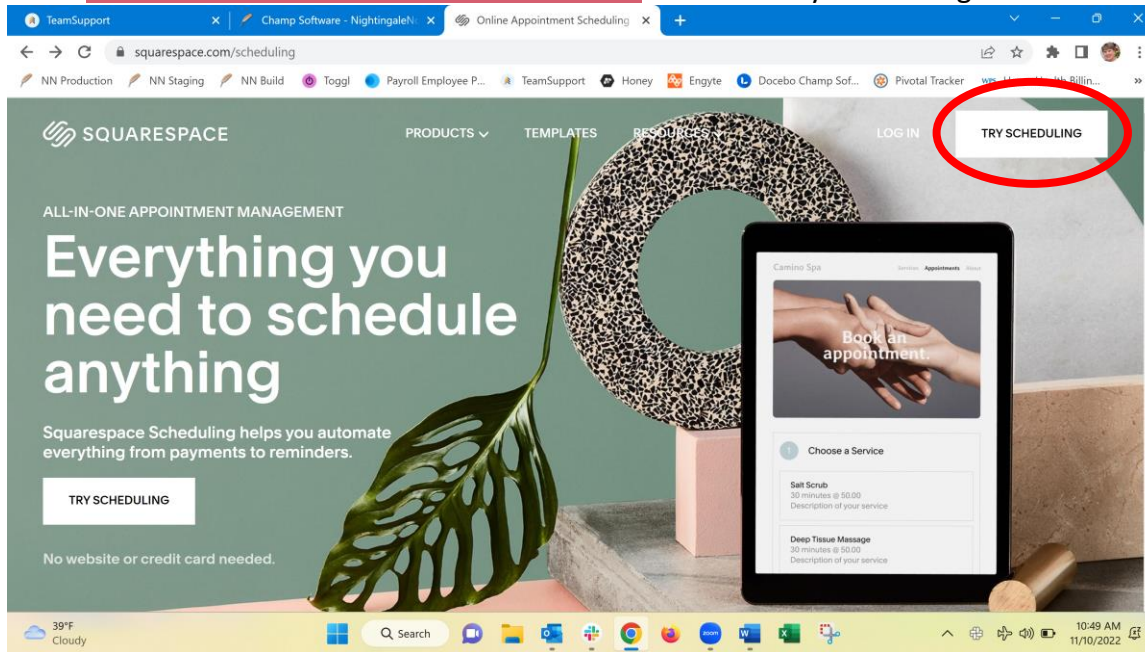
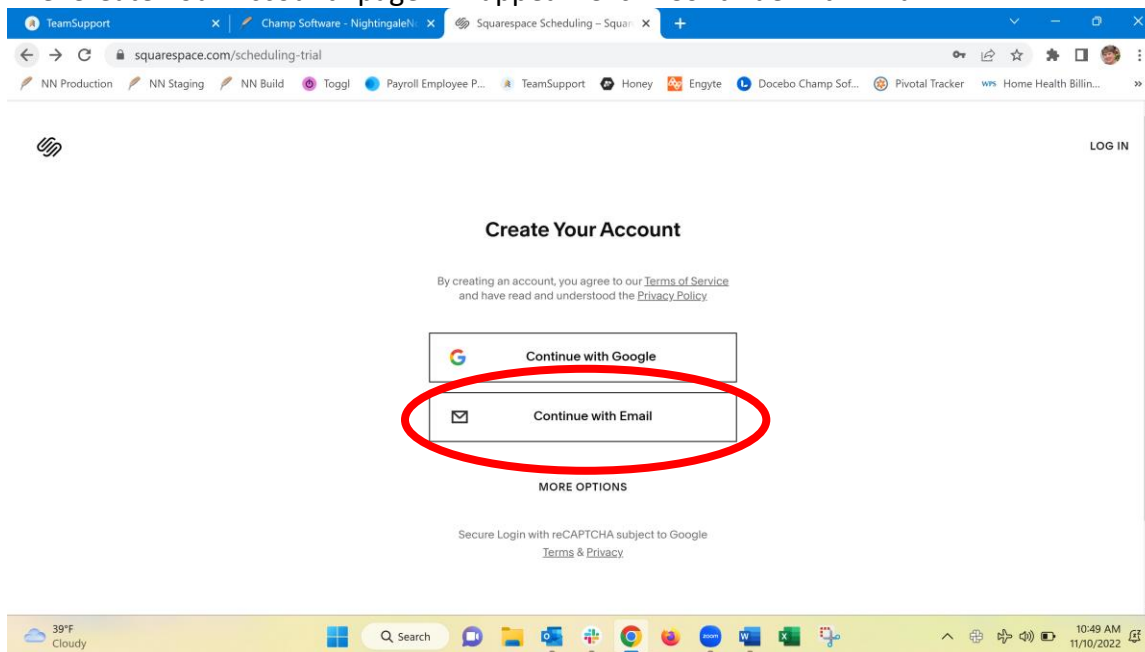


### Signing Up for an Acuity Powerhouse Account

1. Go to <https://www.squarespace.com/scheduling> and click “Try Scheduling”.



2. The “Create Your Account” page will appear. Click “Continue with Email”.



3. Fill in your first name, last name, email address & create a password. Click on “Continue”.

The screenshot shows a web browser window with the URL `squarespace.com/scheduling-trial`. The page title is "Create Your Account". The form contains the following fields:

- FIRST NAME: First Name
- LAST NAME: Last Name
- EMAIL ADDRESS: name@example.com
- PASSWORD: Password

Below the fields, there is a link for "Terms of Service" and another for "Privacy Policy". The "CONTINUE" button is circled in red. A "BACK" button is visible below the form.

4. You will see the words “Scheduling your trial” as your account is being set up.

5. On the “Set up your Scheduler” you will enter your business name. Do not enter anything in the Scheduling Page URL as it will auto fill. Click “Next”.

The screenshot shows a web browser window with the URL `bat-carnation-c8lk.squarespace.com/config/scheduling`. The page title is "Set up your scheduling page". The form contains the following fields:

- BUSINESS NAME: Des Moines Township Public Health
- SCHEDULING PAGE URL (OPTIONAL): DesMoinesTownshipPublicHealth .as.me

Below the fields, there is a note: "Clients will be able to schedule with you through this URL." The "NEXT" button is circled in red.

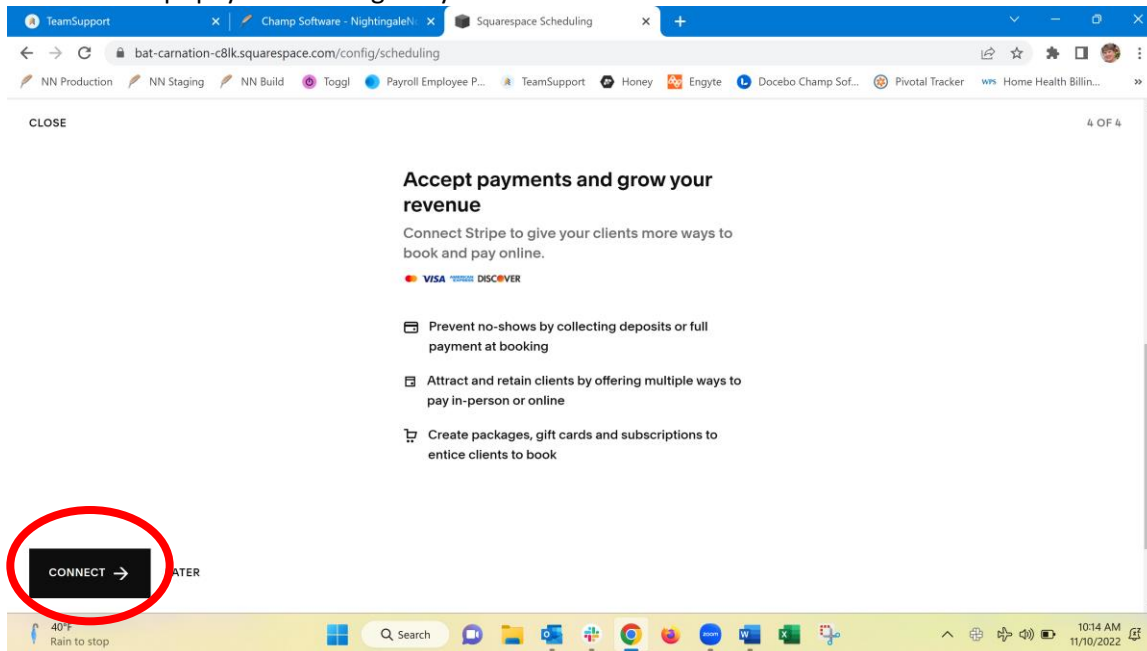
6. Enter your first appointment type and click “Next”. Please note that you can set up multiple appointment once your set up is complete.

The screenshot shows a web browser window with the URL `bat-carnation-c8lk.squarespace.com/config/scheduling`. The page title is "Set up your first appointment type". Below the title, there is a sub-header "Set up your first appointment type" and a paragraph: "You'll be able to create more appointments and classes later." The form contains three input fields: "NAME" with the value "Medication Management", "DURATION IN MINUTES" with the value "30", and "PRICE (OPTIONAL)" with the value "\$ 60.00". At the bottom right of the form, there is a "NEXT" button with a right-pointing arrow, which is circled in red. The browser's taskbar at the bottom shows the date and time as 11/10/2022, 10:50 AM.

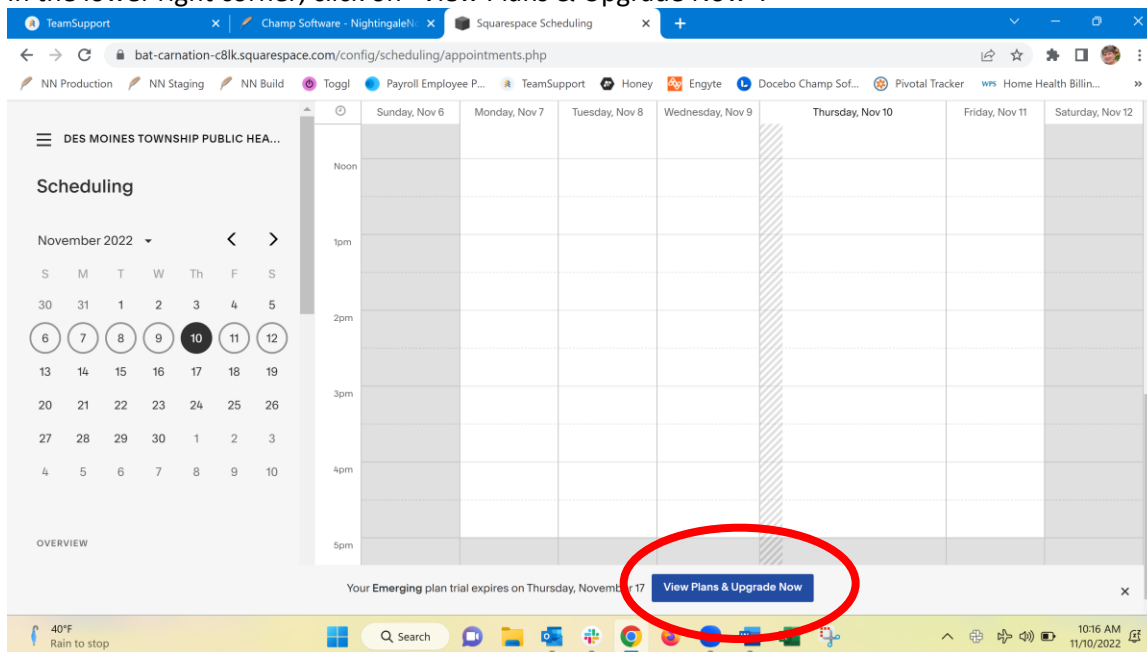
7. Enter your normal business hours under “Set up your availability”. Scroll to the bottom of the web page and click “Next” at the bottom.

The screenshot shows the same web browser window, now on the "Set up your availability" page. The sub-header is "Set up your availability" and the text reads: "These are the times when people are able to book their appointments with you." Below this, there is a list of days with checkboxes and time ranges: Sunday (unchecked), Monday (checked, 8:00am-5:00pm), Tuesday (checked, 8:00am-5:00pm), Wednesday (checked, 8:00am-5:00pm), Thursday (checked, 8:00am-5:00pm), Friday (checked, 8:00am-5:00pm), and Saturday (unchecked). At the bottom, there is a note: "This is just the beginning. You can fine tune this later under Availability." The browser's taskbar at the bottom shows the date and time as 11/10/2022, 10:12 AM.

8. On the “Accept payments and grow your revenue” click on “Later” at the left bottom.



9. In the lower right corner, click on “View Plans & Upgrade Now”.



10. Select if you wish to pay annually or monthly and click "Select" below the Powerhouse plan.

TeamSupport | Champ Software - NightingaleH... | Squarespace Scheduling

bat-carnation-c8lk.squarespace.com/config/scheduling/appointments.php

PLANS > PAYMENT > REVIEW \$ USD

### Select a Scheduling Plan

Simple plans. Simple prices. Only pay for what you really need. All plans come with award-winning 24/7 customer support. Prices do not include applicable taxes.

Pay annually  
 Pay monthly

Plan	Price	Frequency	Savings
Emerging	\$14	per month	Save 6% annually
Growing	\$23	per month	Save 8% annually
Powerhouse	\$45	per month	Save 10% annually

FEATURES

40°F Rain to stop

10:18 AM 11/10/2022

11. Enter your credit card and billing information

TeamSupport | Champ Software - NightingaleH... | Squarespace Scheduling

bat-carnation-c8lk.squarespace.com/config/scheduling/appointments.php

### Payment information

All your payment information is securely submitted.

CREDIT CARD

Cardholder Name Full Name

Card Number 1234 1234 1234 1234

Expiration Date MM / YY

CVC CVC

You can pay with Visa, Mastercard, American Express, JCB, or Diner's Club. By saving your card details, you authorize Squarespace to save your information for future purchases, subscriptions and renewals.

BILLING ADDRESS

Street Address Address, Apt #

City City

State State

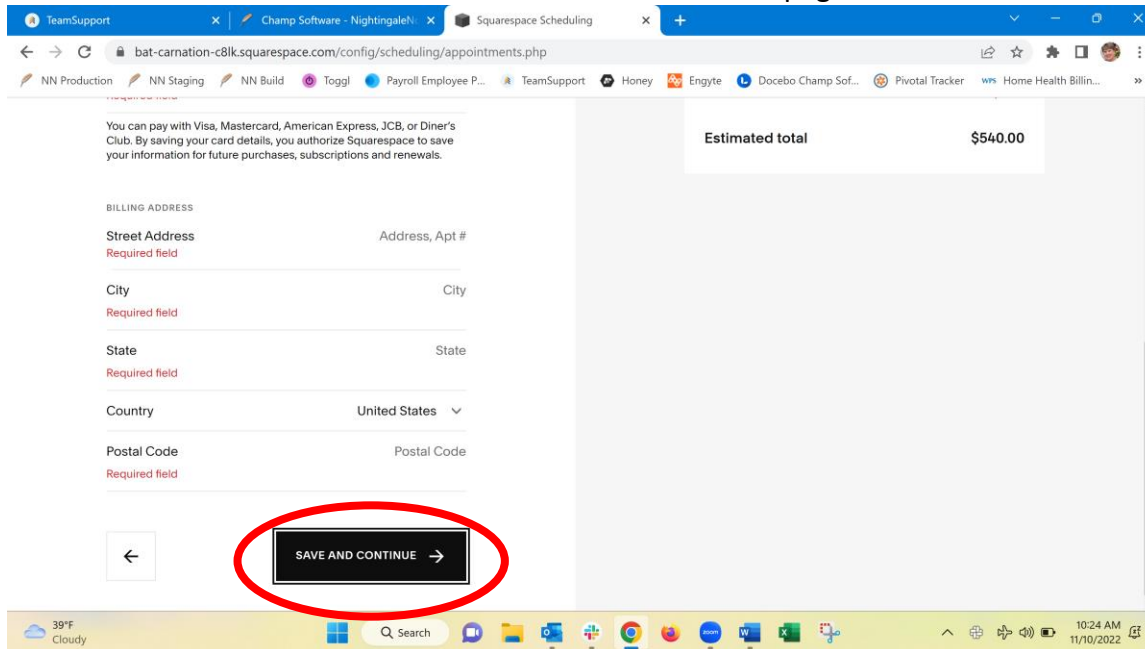
### Order summary

Scheduling - Powerhouse Annual payment	\$540.00
Subtotal	\$540.00
Tax	\$0.00
<b>Estimated total</b>	<b>\$540.00</b>

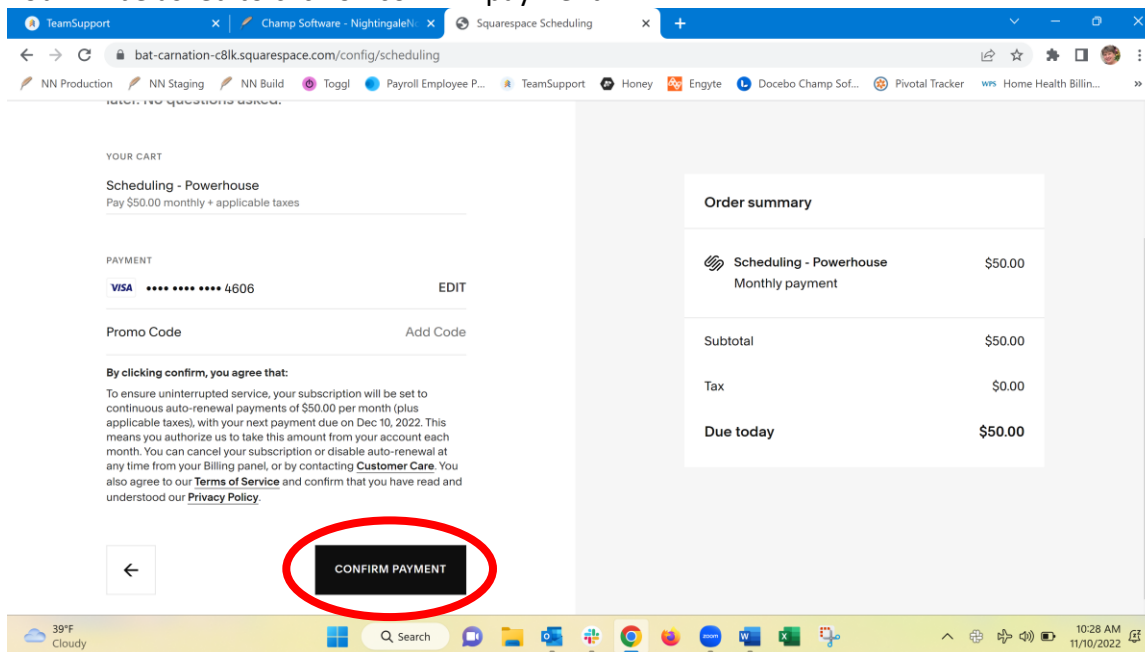
39°F Cloudy

10:23 AM 11/10/2022

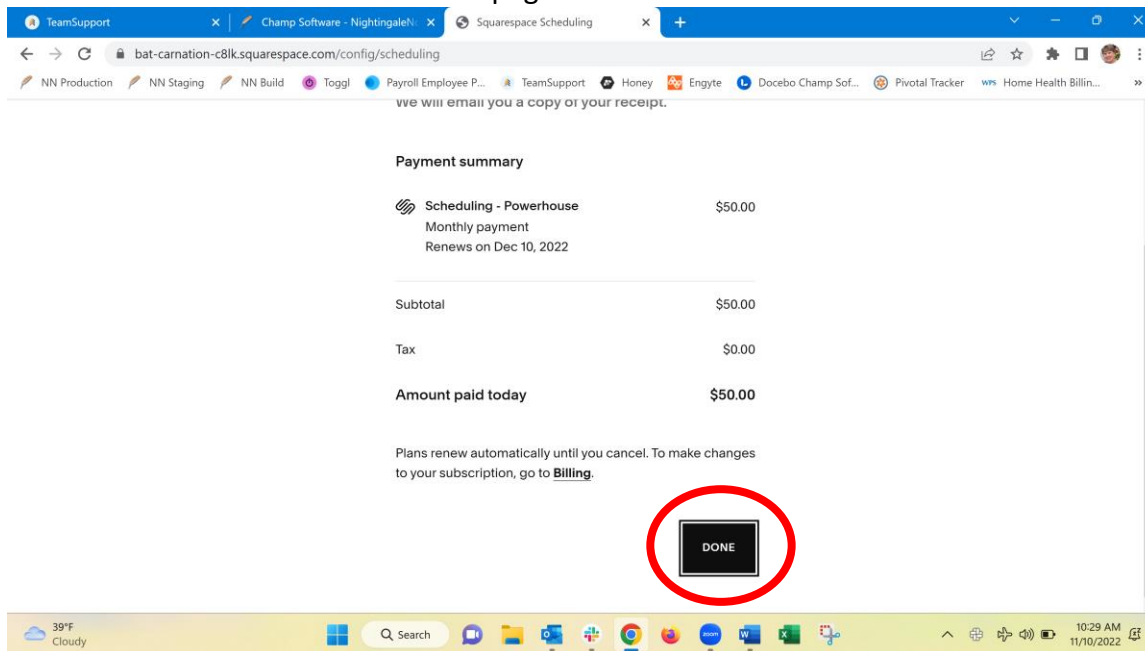
## 12. Click on the Save and Continue button at the bottom of the page



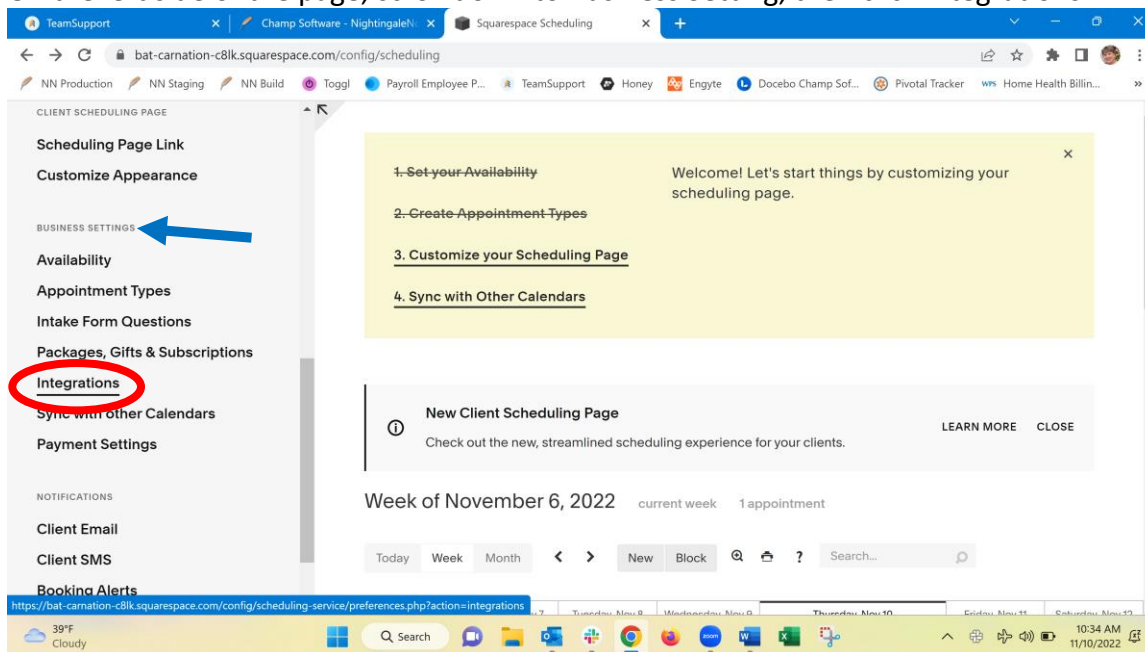
## 13. You will be asked to click on confirm payment



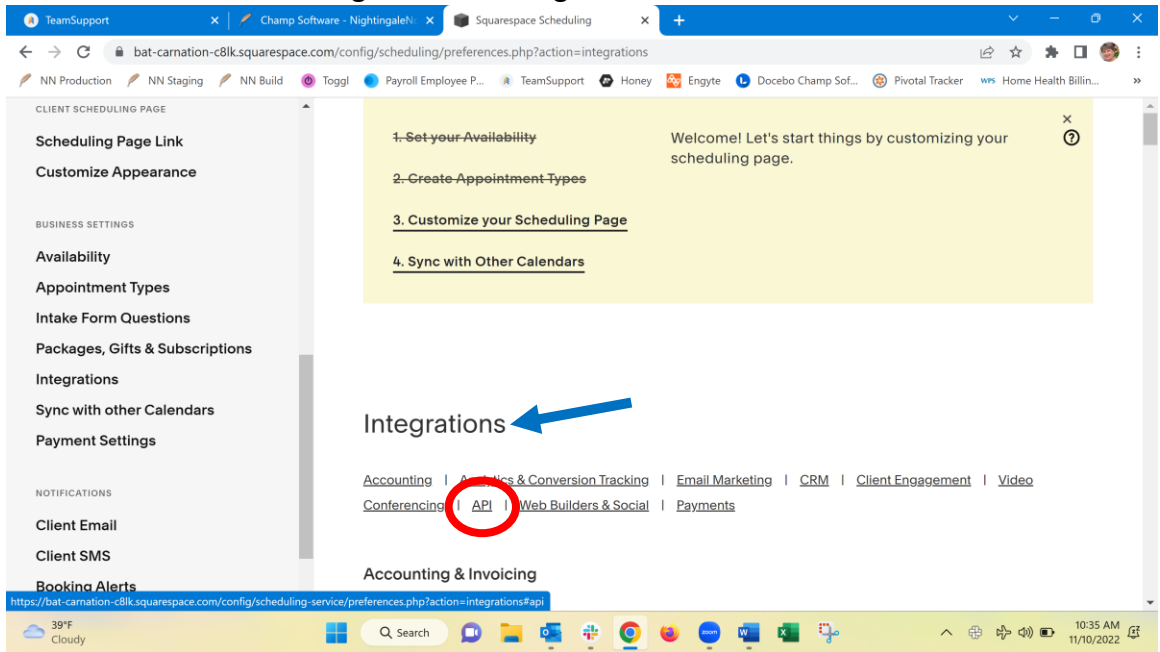
14. Click on "Done" at the bottom of the page.



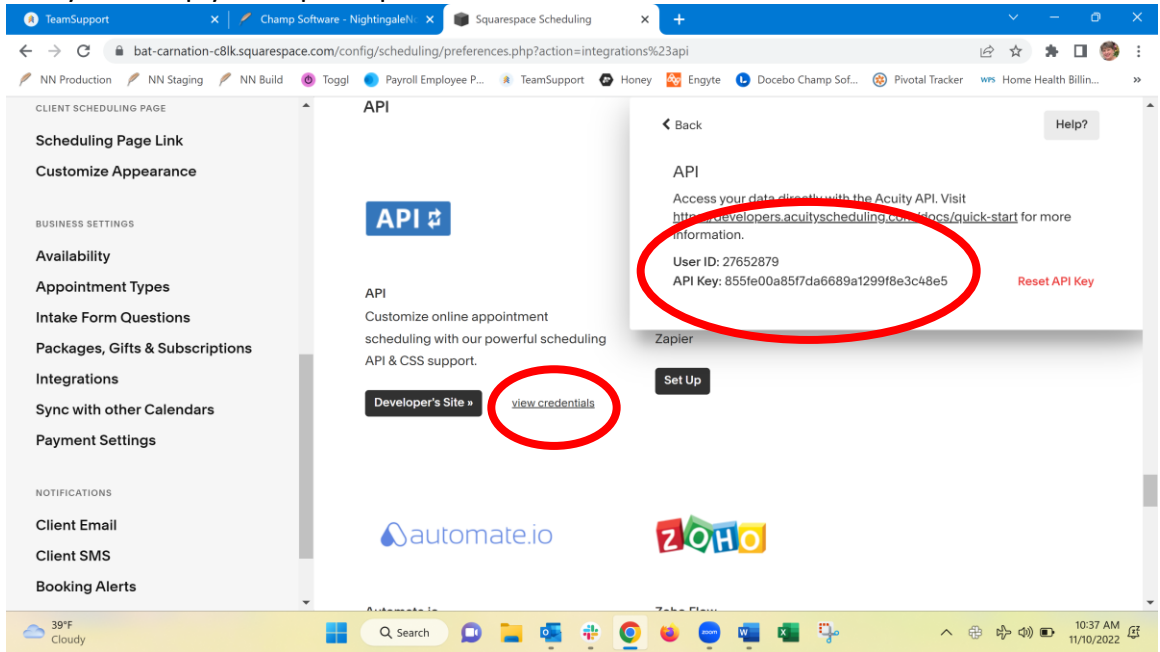
15. On the left side of the page, scroll down to Business Setting, then click Integrations



16. Click on API under the Integrations heading



17. Click on “View credentials”. A popup box will appear with your User Id and API key. Please send both the User Id and API key to [support@champsoftware.com](mailto:support@champsoftware.com). The integration will not show up or work without these two data points. Support will let you know once these two data points are in and you are ready to set up your Squarespace Scheduler.



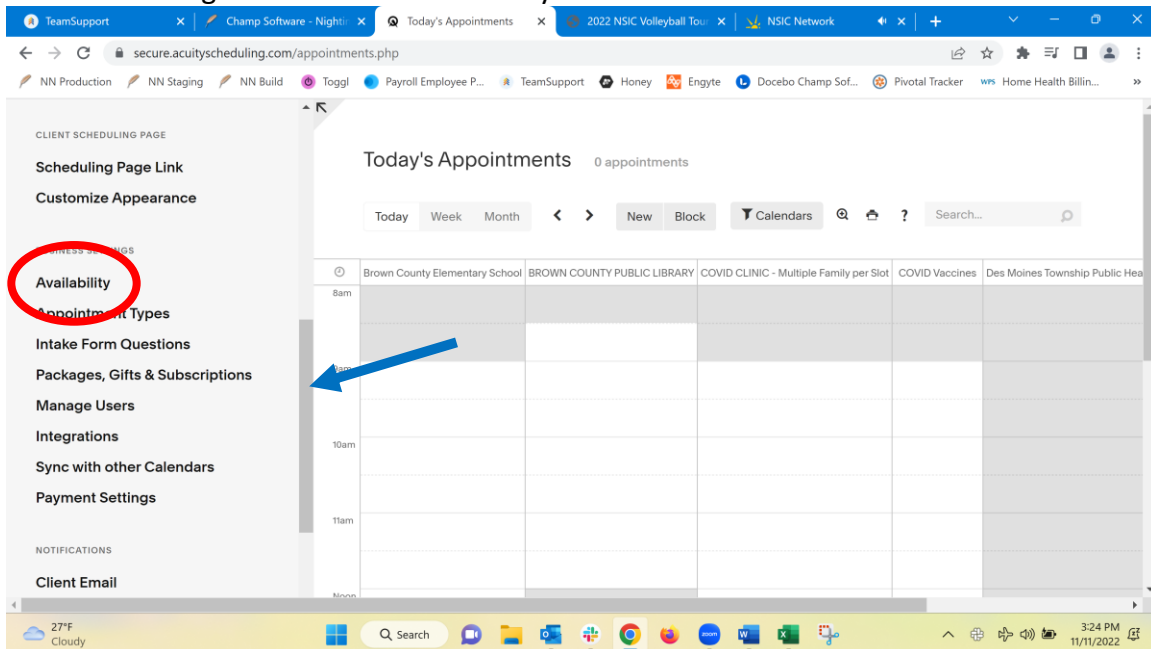


# Getting Started with Acuity

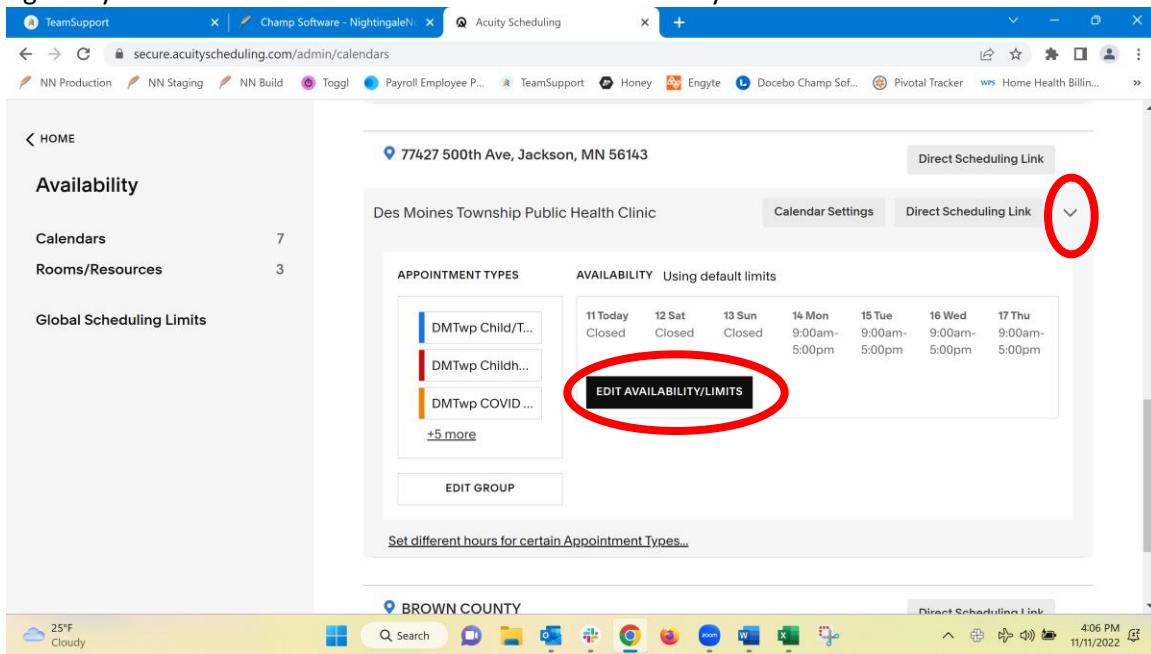
Once you have your Acuity account set up complete and your User Id and API key sent to [support@champsoftware.com](mailto:support@champsoftware.com), you will need to set up your Acuity to reflect the needs of your agency. As an agency, you will need to decide on the number of scheduling calendars that you would like. Your business settings using the Powerhouse version you will allow you up to 36 calendars OR up to 36 users. The business settings also let you set up one or more types of appointments. You will have the ability to develop intake forms with client questions for each appointment. It is important to understand that you can have one or more calendars and each calendar can use the default business settings, or you may customize your settings for individual calendars.

Things to think about when deciding how you would like to set up your agency's Acuity.

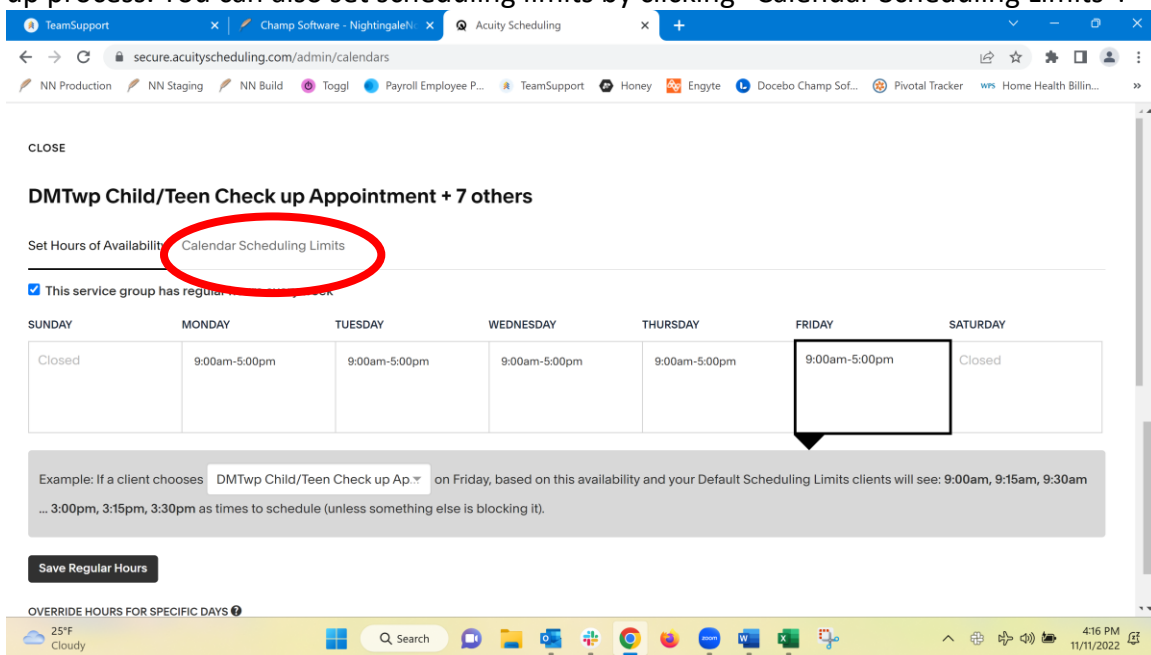
1. How many calendars and/or users do you want for your agency?
  - a. up to 36 calendars or users
  - b. One agency wide calendar or
  - c. Calendar for each staff member or
  - d. Calendar based on services such as
    - i. Childhood Immunizations
    - ii. COVID Vaccinations
    - iii. Influenza Vaccinations
    - iv. TB DOT visits
    - v. Medication Management Visits
    - vi. CTC Exams
  
2. Setting up calendars. Using the scroll bar on the left center side of your Acuity, scroll down to Business Settings and click on "Availability".



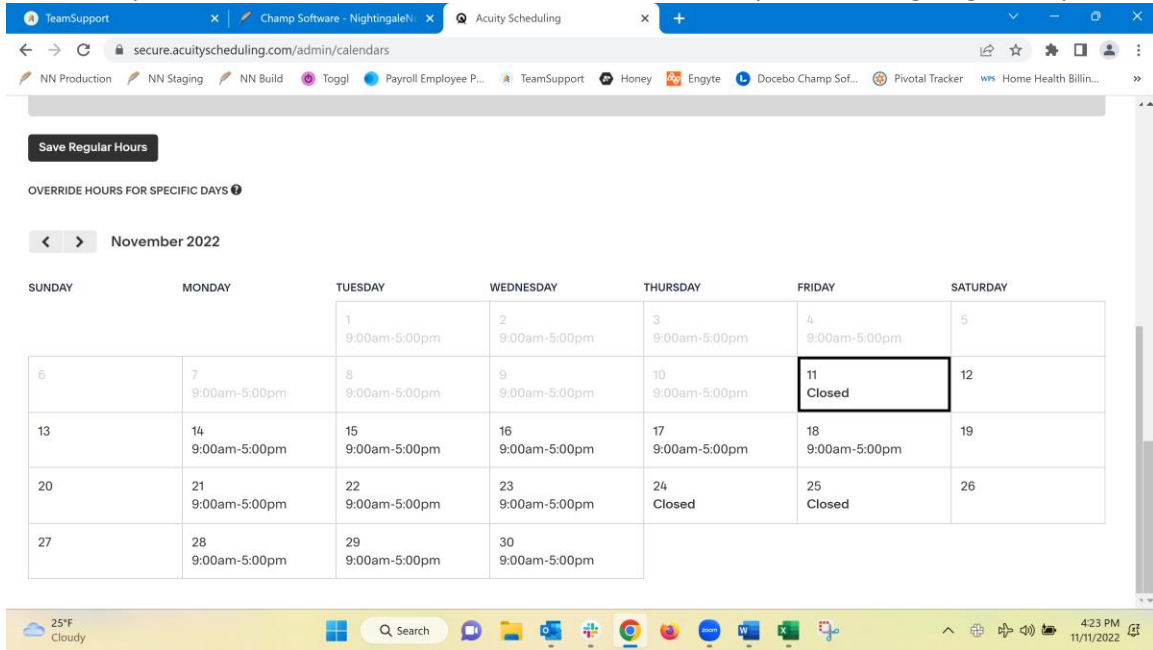
- Here you can edit the calendar that you created when you signed up. Click on the arrow to the on the far right of your calendar. You will then click on “Edit Availability Limits”.



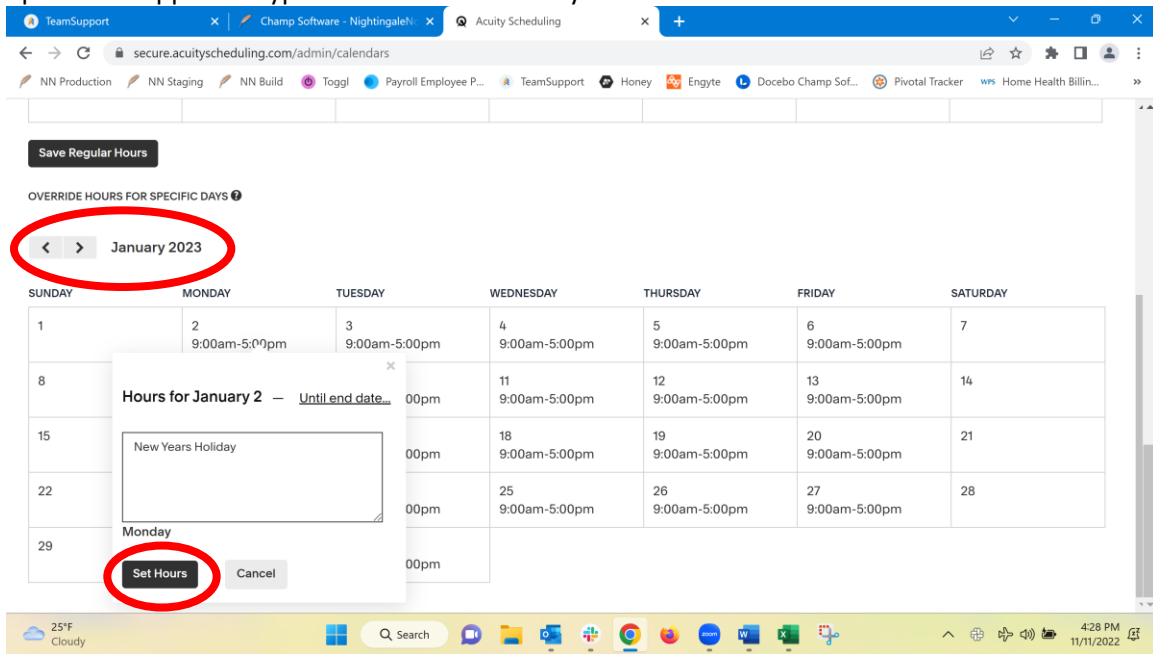
- At the top of the screen you will see hours of availability that you set up previously during the sign up process. You can also set scheduling limits by clicking “Calendar Scheduling Limits”.



- When you scroll further down the page, you will see the option “Override Hours for Specific Days”. You will be able to enter holidays, vacations and any other days the office will be unavailable for appointments. Below is an example of the November calendar with the Veteran’s Day and Thanksgiving holidays listed as Closed.



- To change hours for a specific day, forward to the month that you would like to change. In the example below, I used the < > arrows next to the month. Here I forwarded to January 2023. Click on January 2, a pop up box will appear & type in “New Years Holiday” and click “Set Hours”.



8. Here is what the calendar looks like after you have set the New Years Holiday hours. You will continue this process until you have all your unavailability dates entered in the calendar.

The screenshot displays the Acuity Scheduling calendar for January 2023. The interface includes a 'Save Regular Hours' button and a section for 'OVERRIDE HOURS FOR SPECIFIC DAYS'. The calendar grid shows the following schedule:

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
1	2 Closed	3 9:00am-5:00pm	4 9:00am-5:00pm	5 9:00am-5:00pm	6 9:00am-5:00pm	7
8	9 9:00am-5:00pm	10 9:00am-5:00pm	11 9:00am-5:00pm	12 9:00am-5:00pm	13 9:00am-5:00pm	14
15	16 9:00am-5:00pm	17 9:00am-5:00pm	18 9:00am-5:00pm	19 9:00am-5:00pm	20 9:00am-5:00pm	21
22	23 9:00am-5:00pm	24 9:00am-5:00pm	25 9:00am-5:00pm	26 9:00am-5:00pm	27 9:00am-5:00pm	28
29	30 9:00am-5:00pm	31 9:00am-5:00pm				

The Windows taskbar at the bottom shows the system date as 11/11/2022 and the time as 4:32 PM. The weather is 24°F and Partly sunny.

**Appointment Types**

Types  
Add-ons  
Coupons

**New Type of Service**

NAME <sup>?</sup>

[Add a longer description...](#)  
[Show a message after scheduling...](#)

DURATION <sup>?</sup>  
 minutes

[Block off extra time before or after...](#)

PRICE (\$) <sup>?</sup>

CATEGORY <sup>?</sup>

[Create a new Category...](#)

Calendars <sup>?</sup>

- Brown County Elementary School
- BROWN COUNTY PUBLIC LIBRARY
- COVID CLINIC - Multiple Family per Slot
- COVID Vaccines
- Des Moines Township Public Health Clinic
- Dose 1/First Shot
- Influenza vaccine clinic
- [View all calendars >](#)

Resources <sup>?</sup>

- Joan Christmas

9.

Once you have updated your calendar, scroll back to the top and click "Close" in the upper left hand corner.

CLOSE

**DMTwp Child/Teen Check up Appointment + 7 others**

[Set Hours of Availability](#) [Calendar Scheduling Limits](#)

This service group has regular hours every week

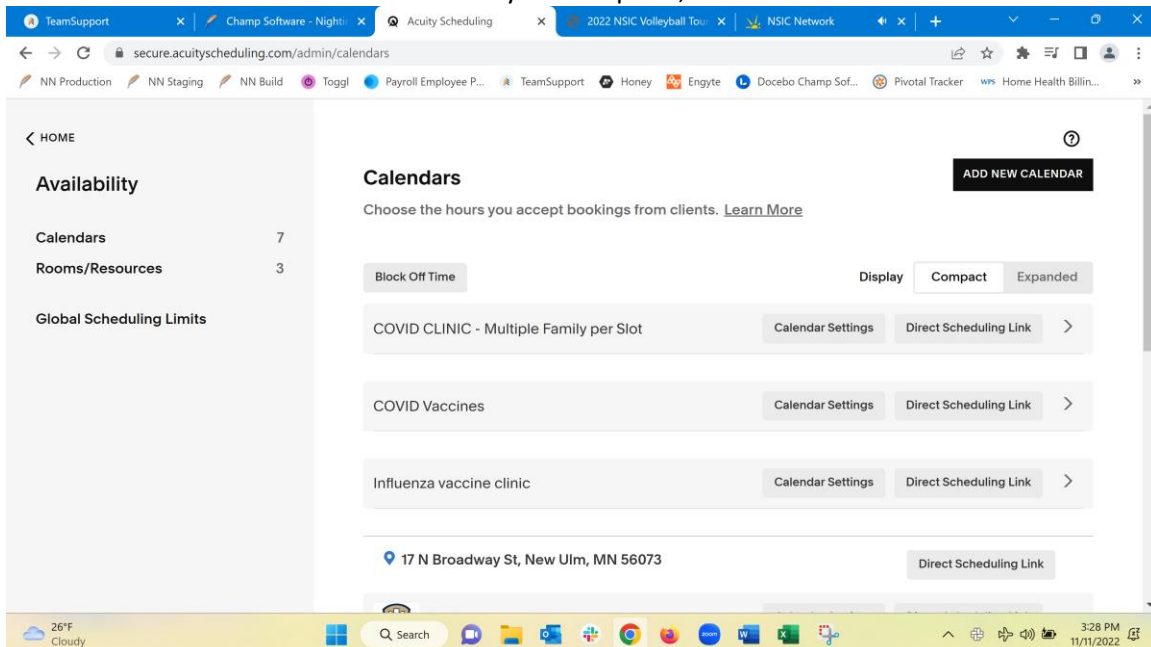
SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
Closed	9:00am-5:00pm	9:00am-5:00pm	9:00am-5:00pm	9:00am-5:00pm	9:00am-5:00pm	Closed

Example: If a client chooses  on Friday, based on this availability and your Default Scheduling Limits clients will see: 9:00am, 9:15am, 9:30am ... 3:00pm, 3:15pm, 3:30pm as times to schedule (unless something else is blocking it).

**Save Regular Hours**

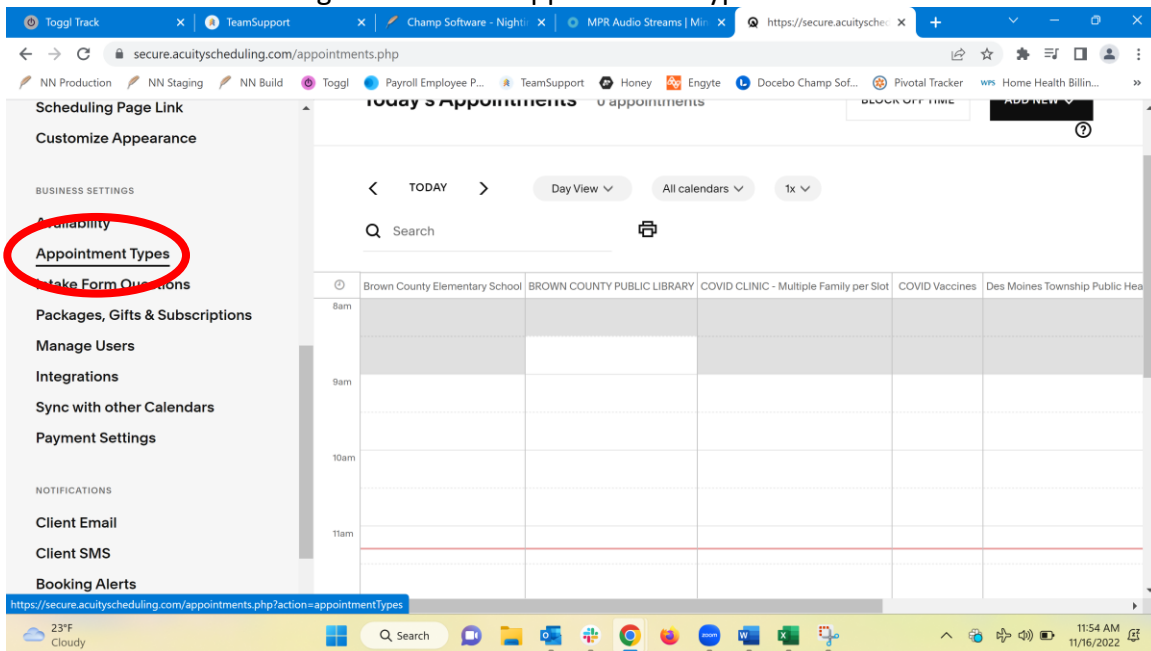
OVERWRITE HOURS FOR SPECIFIC DAYS <sup>?</sup>

10. To create a new calendar in the Availability menu option, click “Add New Calendar”

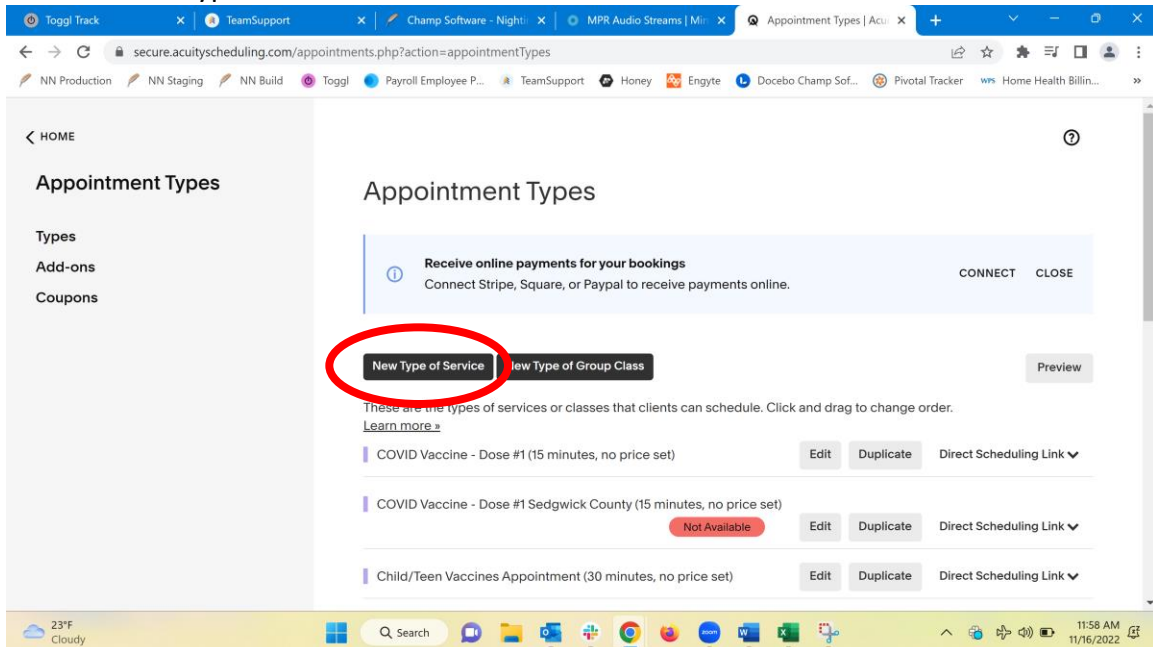


11. What types of appointments do you wish to create? As you are deciding this, in your NN go to Set-up and look at you list of Services in NN. As you review your list of services in NN, which services would be applicable for clients to schedule themselves?

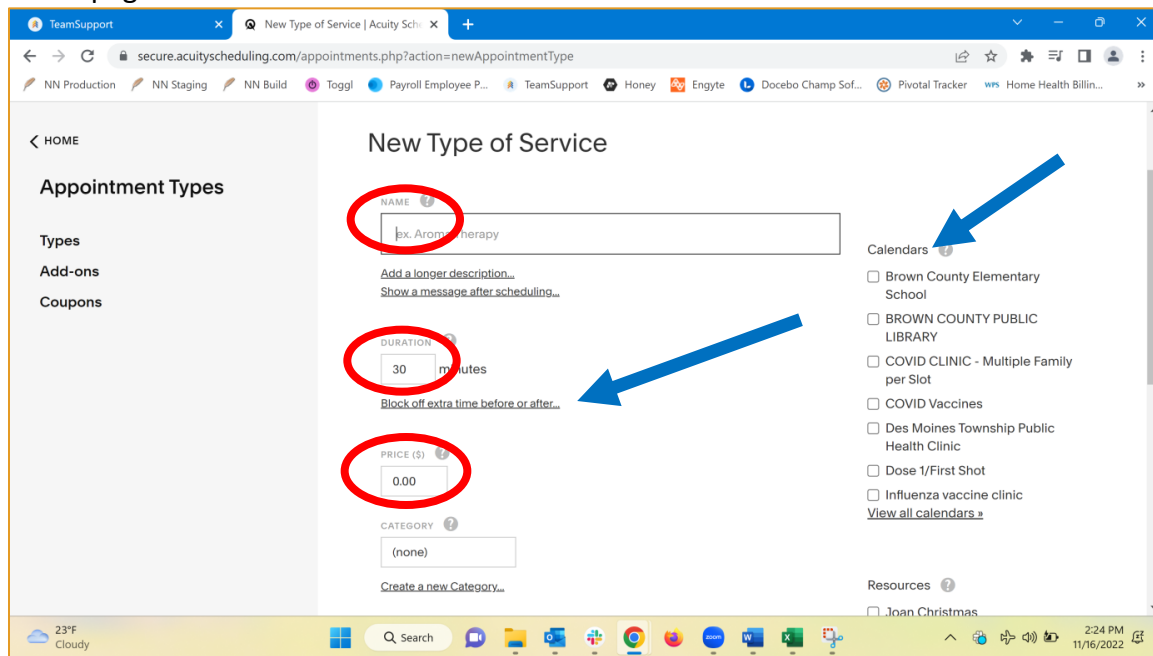
12. Setting up Appointment Types. Using the scroll bar on the left center side of your Acuity, scroll down to Business Settings and click on Appointment Types.



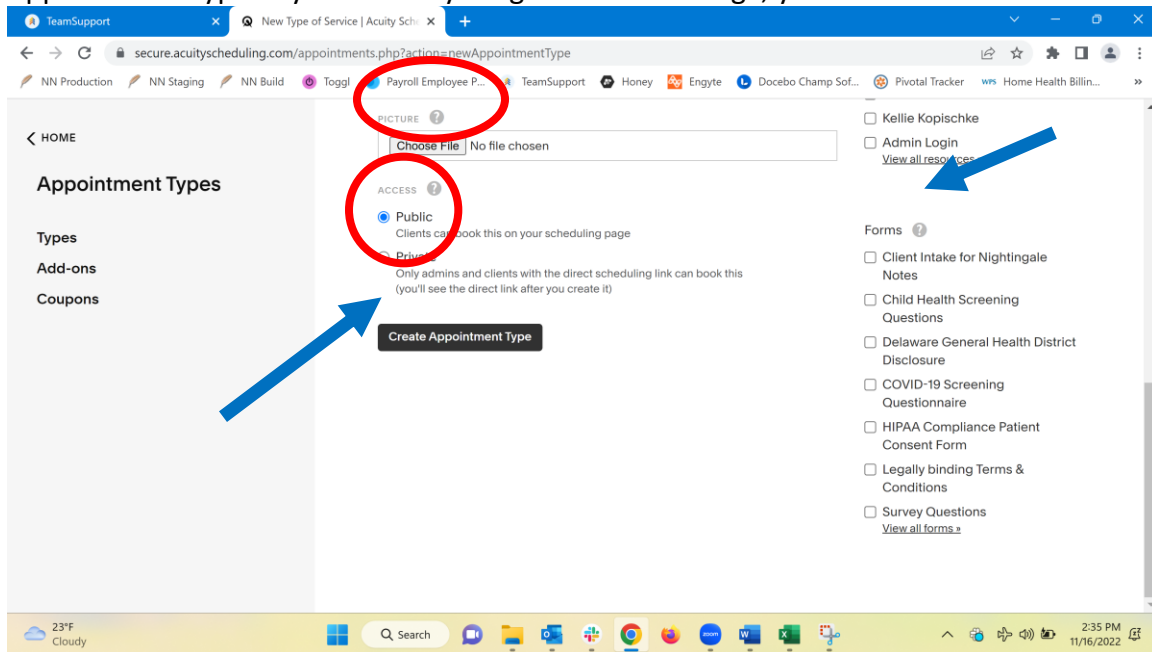
### 13. Click on New Type of Service.



14. You will now create your Type of Service. Fill in the following fields: Name (this will be the name of your Appointment Type), Duration, there is an option to block off time before and after to allow for travel time for appointments that are not in the office, Price is what your agency charges for the service and Category, which is an optional field. Make sure that you select the calendar you want this appointment type available on. Once complete use the right scroll bar to scroll to the bottom of the page.



15. The remaining field to fill is add a picture (if desired) and decide whether this is Public or Private Appointment Type. Check any forms that you will want available for this Appointment Type. Please note that no forms will show up until you create them in the next step. Click on **Create Appointment Type**. If you miss anything or wish to change, you can edit later.



16. The next decisions that will need to be made are what kinds of intake forms do want/need for your agency? "Intake Form Questions" are forms that show when a patient registers for an appointment. The intake form data is brought into Nightingale Notes. Some fields that map from Nightingale Notes to Acuity will be brought in as standard fields. When data fields are set up in Acuity that are not mapped to Nightingale Notes, you will be able to see those answers in a PDF report that you can print from Manage Acuity Appointments. Form examples include but are not limited to are:

- a. Client intake form that are applicable to all clients
  - i. Client Intake Form
  - ii. Client Pay Source Information
  - iii. HIPAA Consent Form.
- b. Specific intake forms for various types of appointments (services)
  - i. Childhood Immunizations
  - ii. COVID Vaccinations
  - iii. Influenza Vaccinations
  - iv. TB DOT visits
  - v. Medication Management Visits
  - vi. CTC Exams



17. Here is a list of fields that you can map from Acuity to Nightingale Notes.

<b>Nightingale Notes Field</b>	<b>Acuity Form Field</b>	<b>Notes</b>
Client First Name*	First Name*	This is required by Acuity and Nightingale Notes and in Acuity is automatically on every appointment.
Client Last Name*	Last Name*	This is required by Acuity and Nightingale Notes and in Acuity is automatically on every appointment.
Born On	<i>Birthdate (DD/MM/YYYY)</i>	Textbox field
Gender (limited to HL7 values)	<i>Gender</i>	Drop Down List field HL7 values; Ambiguous, Female, Male, Not Applicable, Other, Unknown
Address Line 1	<i>Street Address</i>	Textbox field
Address Line2	<i>Apartment/Suite/PO Box</i>	Textbox field
Zip Code	<i>Zip Code (5 digit)</i>	Textbox field
Email	Email	
Cell phone	<i>Cell phone or Alternate Phone</i>	Textbox field
Home phone	Phone	The phone field is a standard part of every Acuity appointment but is not required. If you choose to, you can map it to a phone field in Nightingale and then add a second, custom field to Acuity for another type of phone, labeling it as needed (cell phone for example).
Pay Source	<i>Primary Insurance</i>	Drop Down List field See notes on setting up Nightingale Notes pay sources with an alias to map this.
Subscriber ID	<i>Insurance Patient ID Number</i>	Textbox field
Patient Relationship	<i>Patient Relationship to Insured</i>	Drop Down List field Nightingale Notes valid values: Self, Spouse, Child, Other
Group Name	<i>Insurance Group Name</i>	Textbox field
Group Number	<i>Insurance Group Number</i>	Textbox field