



PIMSY Cheat Sheets

Calendar/Scheduling

MY SAL—The PIMSY scheduling calendar. We will do 90% of our work from the calendar.

- To access the calendar you will first need to log in to PIMSY
- You will then see the HOME PAGE.
- In the upper left corner you will see several options.
- To access the calendar, single left click on MY SAL CALENDAR.
- You will then receive a dialogue box that will ask if you want to open the calendar in an independent window, click no.
- At this point your calendar will open along with several options. You will be able to look at your calendar in a weekly view, daily or monthly (I prefer the weekly from 7 AM—7 PM).
- To schedule an appointment, *double click* on the time and day you desire to see the client.
- You will then see another dialogue box open titled EDIT SAL in the upper left corner.
- Click on CLIENT NAME. Begin to type in the name of the client you wish to schedule - a list of clients should appear. Click on your client's name.
- Click on the BILLING CODE box. Click on the arrow to the right and this will reveal several options based upon your client's insurance. Choose "In House Pending" when scheduling appointments (if you are an in-house provider).
- Next select DIVISION - COP or AOP (Child Out Patient or Adult Out Patient), CBHH or ABHH (Child Behavioral Health Home or Adult Behavioral Health Home), or CMED or AMED (Child Medication Management or Adult Medication Management).
- Choose LOCATION. (Example - CBH is the Bangor Office and 32 College Ave is the Waterville Office).
- Add any remarks necessary. When seeing transgender clients, this is a good place to add the name and pronouns that a client uses (versus the legal name on a client's chart). Or "Do not call," if this client doesn't want reminder calls. This is a place to give cues to Front office staff or to yourself. Example - Remarks: SARAH (she/her) Do not call.
- Double check that the date and time and all information is correct.

- At this time you can proceed to the bottom of the dialogue box and left click SAVE. Next click CLOSE.
- Your client/appointment should appear on your calendar.
- NOTE: *A few more helpful hints:*
 - Make sure to uncheck "hide cancellations" (we need to see cancelled appointments in order to do cancellation notes),
 - You may have the option of giving the front office your schedule and they will enter appointments for you.
 - To navigate back to the home screen, click on "windows" at the top, and then select "home" - alternately choose "MY SAL calendar" to navigate back to calendar from home.
 - Remember - if you enter the appointment the day before it is scheduled and do not tell the front office staff, the client may not get a reminder call.
 - You can block off your schedule for other things by creating a new appointment and either just typing something in remarks and clicking save and/or selecting a different STATUS for this new appointment (e.g. VACATION).
 - FYI - SAL stands for Service Activity Log. I know you were wondering!

Last Updated 1/22/19 -seb