



DaySmart Guide

This is your definitive guide to using DaySmart for Foundation Communities' Financial Coaching program! To review video tutorials for all of the features listed here, visit the Coaches' Toolbox section of the Volunteer Resource Page.

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Homepage Overview

- Log into your DaySmart account [here](#).
- After logging in, the site will default to the “Appointments” tab and the current date. You can see all of the appointments taking place that day (see screenshot below).
- We have six “office” spaces available, meaning six appointments can take place at any given time. They’re listed as Phone (1), Phone (2), Phone (3), Zoom (4), In-Person North (5) and In-Person South (6). The numbers correspond to the ETO account that you should use for any given appointment. Appointments assigned to you will have text display in the appointment block. You can click on the appointment to see the full session details. Appointments assigned to another coach will be blank. Here’s a key to the different color blocks:
 - Yellow = Scheduled: the appointment was scheduled but the client hasn’t yet confirmed they’re attending via a reminder email, call or text (clients receive all 3 asking to confirm their attendance 24-48 hours prior).
 - Blue = Confirmed: the client responded to a reminder outreach attempt and confirmed they’ll be in attendance.
 - Brown = Complete: the client attended the appointment.
 - Pink = No-Show: the client did not attend the appointment (nor did they cancel ahead of time).
- Please note that clients never see this version of DaySmart. This is the back-end and is only accessed by staff and volunteers. Clients make/adjust appointments by self-scheduling online [here](#) or calling our appointment line at 737-717-4000.

	Phone (3)	Zoom (4)
9 am	Fina X Test Coach Client Fake- Follow-Up Financial Coach... (123)456-7890	
30		
10 am		
30		
11 am		
30		
12 pm		
30		

Appointment Email Notifications & Reviewing Appointment Details

- Once scheduled for an appointment, you’ll receive an email notification. This is the only way you’re alerted. All appointments are scheduled at least 3 days in advance (so that you have a heads up whether you’re volunteering for any given day/time). If you do not receive appointment notifications for one of your regularly scheduled volunteer blocks, this means you do not need to volunteer that date/time.
- Coaches do not need to alert us that they received the notification and they’re available for the appointment. Unless we hear from you, we assume you’ll be there!
- If you do need to cancel (perhaps you forgot to block off the date or something pops up at the last minute), please contact the volunteer coordinator or the appointment line at 737-717-4000. We’ll see if another coach can take the appointment or we’ll get the client rescheduled. Please do NOT go into the system to cancel the appointment.

- If you see in the notification that it's a Zoom appointment, you'll need to schedule the Zoom meeting and enter the details in DaySmart at least 2 days prior to the appointment. If it's a phone appointment or in-person, there's no action to take ahead of time.
- The email's subject line is "Appointment Notification – Client's Name." It contains a few key details about the appointment (see screenshot below).
- If you log into DaySmart and click on the appointment, you can see the full details (see second screenshot below).

First Name: Client
Last Name: Fake

EMAIL NOTIFICATION

Date: 5/27/2022

Time: 12:00pm

Language of appointment: English

Office: Phone (2)

Are you a Foundation Communities resident?: No

Financial Coach: X Test Coach

Service: Follow-Up Financial Coaching (Virtual)
Add-on Service:

Special Instructions: Remember to bring bills for budgeting

Financial Coach Notes: Client said she'll be 5 minutes late

FULL DETAILS IN DaySmart (click on the appointment from the main "Appointments" tab and this will open in a new window)

Client Information

[Edit Details](#) [Profile](#)

SMS Appointment Reminder: Inactive [\[edit\]](#)

First Name
Client

Last Name
Fake

Zip Code
78704

Primary Phone
(123)456-7890

E-mail 
eliana.brant@foundcom.org

Are you a Foundation Communities resident?
No

Birth Date
1/1/1905

Gender
Female

Annual Household Income
More than \$0 and less than \$25,000

Language of appointment? Idioma de cita?
English

Appointment Information

Friday, May 27, 2022
2:00pm - 3:30pm US/Central

May
27

Appointment Details

Financial Coaching

Financial Coach

X Test Coach

Service

Virtual Financial Coaching

Office

Zoom (4)

Status Information

Status

Scheduled 

Created By: X Test Coach on 5/25/2022 at 2:39pm
Last Updated By: X Test Coach on 5/25/2022 at 5:29pm

Notes

Appointment Notes

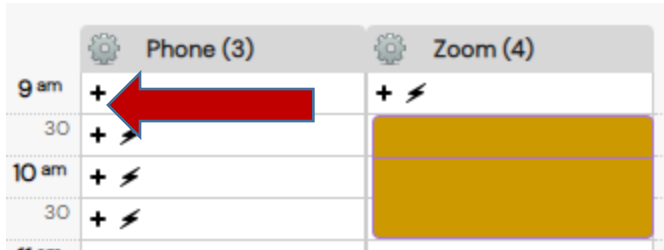
Client said she'll be five minutes late

Special Instructions

Remember to bring bills for budgeting

How to Schedule an Appointment

- The majority of appointments will be made by clients self-scheduling online or speaking with a staff member on the appointment line.
- Any appointments you schedule will likely be follow-up appointments for returning clients.
- Start by picking the date of interest from the calendar on the “Appointments” tab. Click the “+” icon at the time of the appointment in one of the open offices (any office with a block already has an appointment taking place at that time).



- If it's a returning client, begin to type their name into the client search and you'll see a list of possible name matches – click on the correct one and their information will populate in all the fields. Click the “Next” button at the bottom of the screen to continue scheduling.

Client Appointment Finalize

Client Information

Client Search

- Test Client
- Test Client

- Double check the date in the corner. Leave the “Status” dropdown as “Scheduled.” Select “Service.” Phone or Zoom appointments will be “Virtual Financial Coaching.” In-person appointments will be “In-Person Financial Coaching.” You’ll also see a second option for follow-up appointments. This will default to a 60-minute time block instead of the standard 90-minute one. For any returning clients, you can still choose the normal 90-minute service. However, if you think the session will be shorter, as follow-ups sometimes can be, you can choose the 60-minute follow up option. Select your name from the “Financial Coach” dropdown. Under “Office” it should default to the one you picked. Time should also default but double check. Typically there isn't a need to include “Add-on Services.” “Special Instructions to/from Client” are notes you can send to a client (these will display in the client’s email notification). This is also where Zoom details are entered. “Appointment Notes (internal only)” are only visible to staff & volunteers (you can leave notes for yourself or staff can leave notes for you here). Click the “Next” button on the bottom to continue.

Date: May 27, 2022

Program: Financial Coaching

Status: Scheduled

Service: Virtual Financial C

Financial Coach: X Test Coach

Office: Zoom (4)

Time: 2:00pm

Add-on Services: - select -

Special Instructions to/from Client: Remember to bring bills for budgeting

Appointment Notes (internal only): Client said she'll be five minutes late


- The appointment details will display on the next screen – double check that everything looks correct. Notifications can be sent by email to you & the client. The client can also receive a text reminder. Click “Finalize Appointment.” A green message will then display at the top of the window: “Appointment has been successfully created.” Close out the window.

Notifications

Send appointment email to client

Send appointment email to financial coach

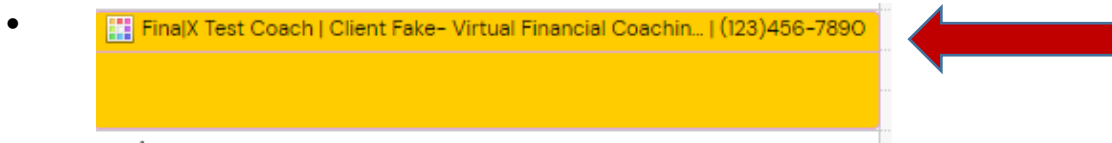
Send SMS appointment reminder to

 1

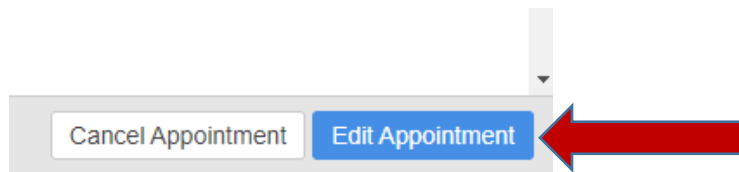
Note: This setting applies to all appointments for this client.

How to Add Zoom Meeting Details to an Appointment


- If your meeting is taking place by Zoom, it’s very important that you schedule the Zoom meeting & add the details to DaySmart at least two days prior to the session. Doing so ensures the Zoom details will be included in the client’s reminder email (and they’ll know how to connect with you at the time of the appointment).
- Since many of you are familiar with scheduling a meeting in Zoom, we won’t include the instructions right here (but they are at the end of this document if you need to review them).
- You’ll begin by scheduling the meeting in Zoom and copying the details (i.e. the link, how to dial in, etc.).
- Next, log into DaySmart and click on the appointment to edit.




- In the pop window, click the blue “Edit Appointment” button on the bottom right side.





- On the Appointment Details screen, leave everything as is and paste the Zoom details in the “Special Instructions to/from Client” field. Click the next button on the bottom right side.


Date
May 27, 2022 


Program
Financial Coaching

Status
Scheduled 

Service
Virtual Financial C 

Financial Coach
X Test Coach 

Office
Zoom (4) 

Time
2:00pm 

Special Instructions to/from Client

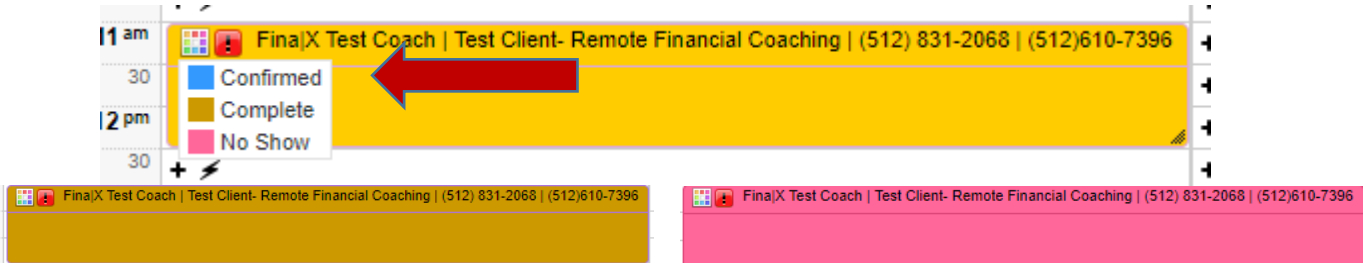
Join Zoom Meeting
<https://us06web.zoom.us/j/87074057197?pwd=VWIWbVbQWFFSQmtBYjllUOhJWg8wQT09>
 Meeting ID: 870 7405 7197

Appointment Notes (internal only)

- On the final screen, click the blue “Save” button on the bottom right side.

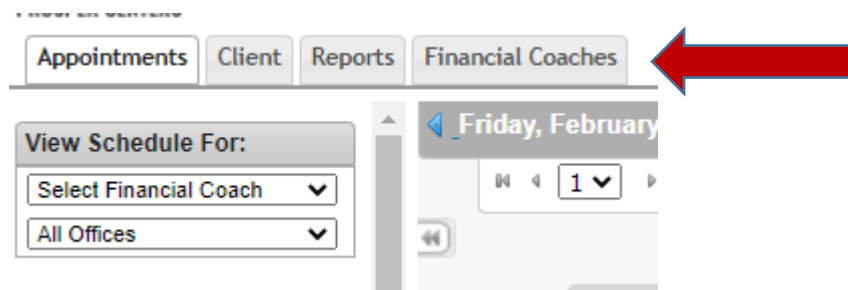
How to Update an Appointment’s Status

- After each session, you’ll update the appointment’s status to “Complete” if the client attends or “No Show” if the client does not attend (and didn’t cancel ahead of time).
- Hover over the colorful icon on the left side of the appointment. Status options will appear. After choosing “Complete,” the appointment displays as brown. After choosing “No Show,” the appointment displays as pink.

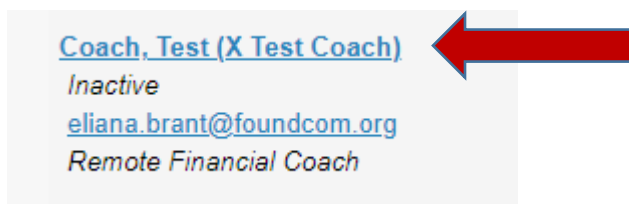


How to Update Your Schedule & General Availability

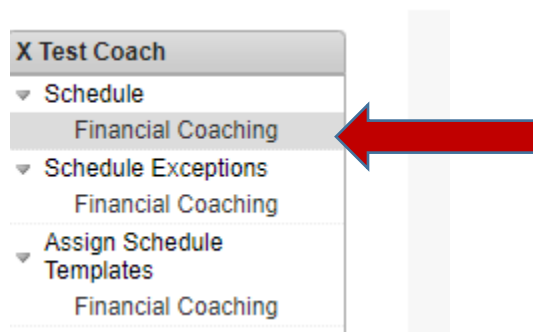
- Click on the “Financial Coaches” tab from the main page.



- Click on your name.



- On the left side menu, click on “Financial Coaching” under “Schedule.”



- Your schedule is when you're typically free to volunteer (you can always mark off specific dates that you're not free). Check "Off" for any days you don't want to volunteer. For any days you do want to take appointments, enter the timeframe. Please note that appointments are scheduled for 90 minute blocks (60 minutes to meet with the client and 30 minutes to complete ETO data entry). You'll want to enter your availability accordingly (i.e. if you want to take at least two back-to-back appointments, you'll enter three hours of availability; if you want to take one appointment, you'll enter 90 minutes, etc.). Be sure to click "Update" or else your changes will not save.

Monday	<input checked="" type="checkbox"/> off	Start time	Select Start Time ▾	End time	Select Close Time ▾
Tuesday	<input type="checkbox"/> off	Start time	2:00pm ▾	End time	4:00pm ▾
Wednesday	<input checked="" type="checkbox"/> off	Start time	Select Start Time ▾	End time	Select Close Time ▾
Thursday	<input checked="" type="checkbox"/> off	Start time	Select Start Time ▾	End time	Select Close Time ▾
Friday	<input checked="" type="checkbox"/> off	Start time	Select Start Time ▾	End time	Select Close Time ▾
Saturday	<input type="checkbox"/> off	Start time	9:00am ▾	End time	4:00pm ▾
Sunday	<input checked="" type="checkbox"/> off	Start time	Closed	End time	Closed

How to Block Off Specific Dates

- On the left side menu, click on "Financial Coaching" under "Days Off"

X Test Coach
▼ Schedule
Financial Coaching
▼ Schedule Exceptions
Financial Coaching
▼ Assign Schedule
Templates
Financial Coaching
▼ Offices
Financial Coaching
▼ Services Offered
Financial Coaching
▼ Days Off
Financial Coaching
▫ Languages

- Check the dates you want to block off. Be sure to click "Update" on the bottom of the page or else your changes won't save. After saving it, you'll see the days are blocked in blue. Days greyed out are ones that Foundation Communities is closed. If you made a mistake and need to fix the dates, click the "edit" button.

select all days

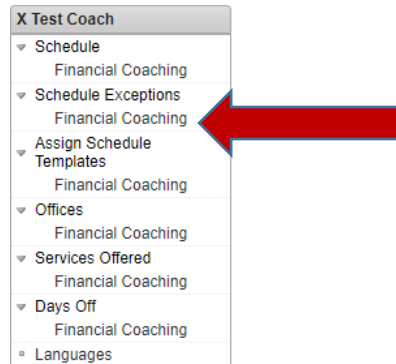
December 2021						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1	2	3	4
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	6	7	8	9	10	11
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12	13	14	15	16	17	18
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19	20	21	22	23	24	25
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
26	27	28	29	30	31	
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

select all days

December 2021						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1	2	3	4
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	6	7	8	9	10	11
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12	13	14	15	16	17	18
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19	20	21	22	23	24	25
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
26	27	28	29	30	31	
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

How to Create Schedule Exceptions


- Schedule exceptions allow you to make yourself available on days and/or times you're not typically free. For example, if your schedule is typically Tuesdays 3:00-6:00, this allows you to open availability on a specific date/time outside of that. Perhaps one week you want to take appointments on a Friday afternoon, you'll schedule an exception for the specific date. Or if you want to extend your general Tuesday 3:00-6:00 availability, you could extend it to 2:00-7:00 for a specific date.
- On the left side menu, click on "Financial Coaching" under "Schedule Exceptions."



- Choose the specific date, start time, end time and click "Add" to save the exception.
- If adding availability to a day you're already free (i.e. you're typically free Mondays 9-12 but on a specific date, you want to be free 9-1:00), enter the full time you want to be available (9-1). Otherwise, a schedule exception of 12-1 would override your regular availability and only make you available for one hour.
- The system only allows you to enter one exception per date (i.e. you can't enter 4/28 11:30-1:00 and 4/28 2:00-3:30). Here are some workarounds:
 - If you're adding time to a day already open on your schedule (i.e. you want to extend your general Tuesday 4:00-6:00 availability to 3:00-7:00 for a specific date). You'll enter one exception for the full time block 3:00-7:00 (rather than adding one for 3:00-4:00 and one for 6:00-7:00).
 - Remember – if you're adding time to a day you're typically free, you'll want to include the whole time block.
 - If you want to create an exception for a split time (i.e. 4/28 11:30-1:00 and 4/28 2:00-3:30), you'll want to create an exception for the entire time block (4/28 11:30-3:30) and use the instructions below for how to block a portion of the day.

Date	Start Time	End Time	Delete
Wednesday, April 28, 2021	11:30am	3:30pm	<input type="checkbox"/>
Tuesday, May 11, 2021	3:00pm	7:00pm	<input type="checkbox"/>

Select Date ▼ Select Start Time ▼ Select End Time ▼ Add

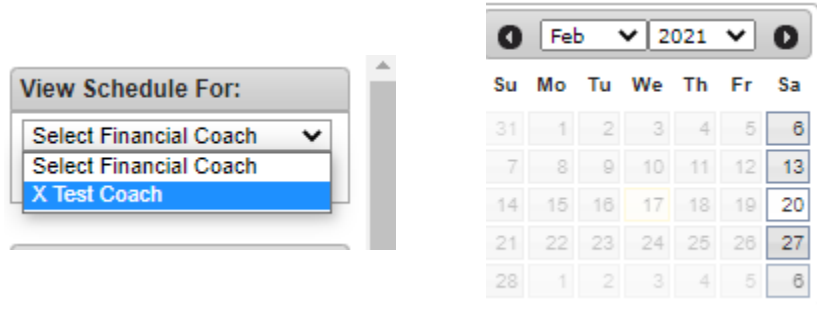


How to Block a Portion of a Day

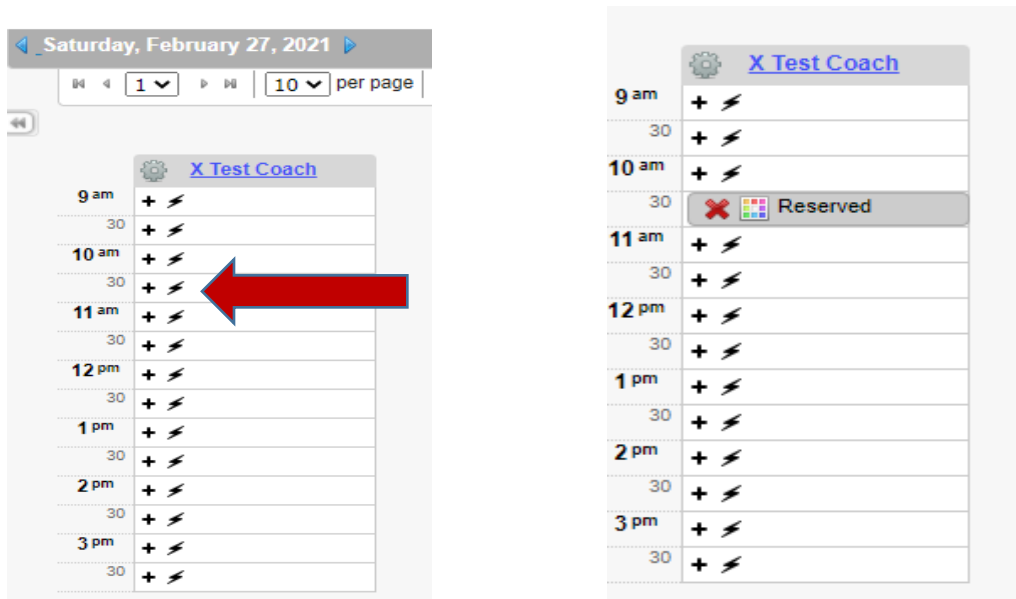
- Blocking a portion of the day is helpful if you don't want to take an entire day off but you only want to be available for part of your regularly scheduled time (i.e. if you're typically free Thursdays 10-1 but on a specific date, you only want to be scheduled 10-12). Or it's helpful in

the scenario we described above (when you want to schedule an exception for a split time in one day).

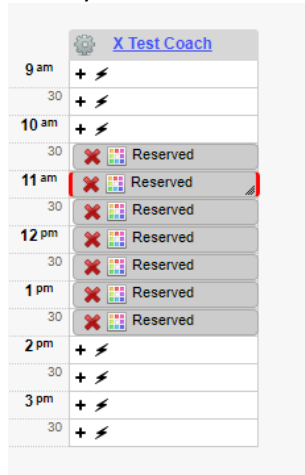
- From the main page (the “Appointments” tab), on the left side menu, select your name under the “Select Financial Coach” dropdown. Then click the date of interest on the calendar.



- Double check the date at the top and double check that your name appears (rather than an “office” name). Click on the lightning bolt icon next to the start of the time you want to block. After you do, it will then display as “X Reserved.”



- To reserve the remaining amount of time, you have two options. Option A – click the lightning bolt icon for every half hour you want reserved.



- Option B: Click on the “Reserved” link in the first half hour you reserved. A popup window will open and you can then set the entire block of time you want to reserve. Click “Update Reserved Time” to save your changes. You can list a reason if you want (but it’s not necessary or required). You’ll receive a message “Reserve time has been updated” – close out the popup window and you’ll see the full time blocked on your calendar for the day.

The screenshot shows a calendar for 'X Test Coach' with a reservation from 10:30 am to 2:00 pm. A popup window is open for updating the reservation, featuring a 'Reason' text box, a 'Time' dropdown menu set to 10:30am to 2:00pm, and a blue 'Update Reserved Time' button.

- When reserving time, it’s very important that you make sure to choose your name in the “Select Financial Coach” dropdown as shown in the first step. If you skip this step, the “Appointments” tab defaults to displaying the office spaces (not your individual calendar) – it would accidentally reserve time in the office space instead of time on your own calendar (as shown in the screenshot below). This would mean that no one could schedule appointments in the specific office at that time (with you or any other coaches). But it would leave your calendar open to be scheduled in any of the other offices. Reserving on your specific calendar ensures your individual time is blocked and other available coaches can still be scheduled in all of the offices.

INCORRECT ☹️

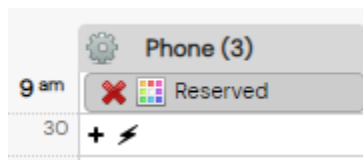
The screenshot shows a calendar for 'Phone (3)' with four 30-minute slots reserved from 9 am to 10:30 am. Each slot is marked with a red 'X' and a 'Reserved' label.

CORRECT 😊

The screenshot shows a calendar for 'X Test Coach' with four 30-minute slots reserved from 9 am to 10:30 am. Each slot is marked with a red 'X' and a 'Reserved' label.

How to Reserve an Office

- There are times when it's helpful to reserve an office space. This is typically a feature you'll use if you need to be in ETO outside of an appointment. Maybe your appointment ran long and you didn't have enough time to complete the ETO data entry. Or perhaps you want to get some extra practice in ETO.
- Begin by choosing a date and making sure you're in the "All Offices View," where you see all of the different office spaces listed.
- Check for a time where there isn't an appointment scheduled and use the reserve function described above: click the lightning bolt icon next to the time you want to reserve (be sure to reserve as much time as you need).



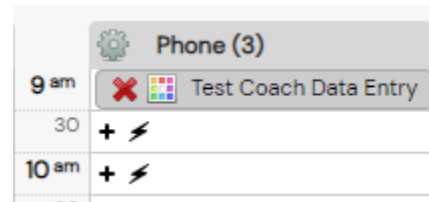
MAKE SURE YOU'RE IN THE OFFICE VIEW IN THIS SCENARIO

- When reserving an office, it is helpful to enter the reason as, "Your Name data entry." Click on the reservation to rename it in the "reason" field.

Reason:

Time:

Update Reserved Time



How to Schedule a Meeting in Zoom

- As noted earlier in this document, you'll need to schedule a meeting in your Zoom account and add the details to DaySmart two days prior to the appointment. Begin by logging into Zoom [here](#).
- Click "Schedule a Meeting" on the top right side.



- On the scheduling screen, we recommend the following settings (image on next page):
 - Topic can remain as "My Meeting" or you can put an identifier like "Financial Coaching Appointment," the client's name, etc.
 - Set the date & time (make sure it's in the Central time zone); duration can be one hour
 - For Meeting ID, we prefer "Generate Automatically" (so that each meeting has a unique link) but you can also use the "Personal Meeting ID"
 - For security, we set a passcode and enable the waiting room (clients won't be able to enter the meeting until you let them in)
 - Video – "on" for both host and participant
 - Audio – "both" – can choose to run audio through your device or call in by phone

Topic

Description (Optional)

When

Duration hr min

Your Zoom Basic plan has a 40-minute time limit on meetings with 3 or more participants. Upgrade now to enjoy unlimited group meetings. Contact [Erika Leos](#)

Do not show this message again

Time Zone

Recurring meeting

Meeting ID Generate Automatically Personal Meeting ID 665 394 8959

Security Passcode

Only users who have the invite link or passcode can join the meeting

Waiting Room

Only users admitted by the host can join the meeting

Require authentication to join

Video

Host on off

Participant on off

Audio Telephone Computer Audio Both

Dial from United States [Edit](#)

Meeting Options Allow participants to join anytime

Mute participants upon entry

Breakout Room pre-assign


Automatically record meeting on the local computer


Approve or block entry for users from specific countries/regions

**WITH BASIC PLANS,
YOU DO NOT HAVE A
40 MINUTE TIME
LIMIT IF IT'S ONLY
TWO PARTICIPANTS;
SINCE APPOINTMENTS
ARE ONLY YOU &
THE CLIENT, THERE
WILL NOT BE A TIME
LIMIT**

- The next screen will display the meeting details (the link to join, the meeting ID, the phone number to call in, etc.), as well as the meeting settings.
- Click the blue “Copy Invitation” link on the right side.

× require authentication to join

Invite Link	https://zoom.us/j/95820726858?pwd=M0Z2MU5HRldFMklySDc0U3BsMlZqZz09	Copy Invitation 
Video	Host	On
	Participant	On
Audio	Telephone and Computer Audio	
	Dial from United States	



- A new window will pop up containing the full details for connecting to the meeting.
- Click the blue “Copy Meeting Invitation” button and the details will save to your clipboard. Close out the window.
- Return to DaySmart to add the Zoom details to the appointment; paste the details in the “Special Instructions To/From Client” field (as shown earlier).

Meeting Invitation

Eliana Brant is inviting you to a scheduled Zoom meeting.

Topic: Financial Coaching Appointment
 Time: Apr 28, 2021 04:00 PM Central Time (US and Canada)

Join Zoom Meeting
<https://zoom.us/j/95820726858?pwd=M0Z2MU5HRldFMklySDc0U3BsMlZqZz09>

Meeting ID: 958 2072 6858
 Passcode: 713924

One tap mobile
 +13462487799,,95820726858#,,,,*713924# US (Houston)
 +12532158782,,95820726858#,,,,*713924# US (Tacoma)

Dial by your location
 +1 346 248 7799 US (Houston)
 +1 253 215 8782 US (Tacoma)
 +1 669 900 6833 US (San Jose)
 +1 301 715 8592 US (Washington DC)
 +1 312 626 6799 US (Chicago)

[Copy Meeting Invitation](#) 