

CALENDAR QUICK REFERENCE



Calendar Setup	Notes
<ul style="list-style-type: none"> <input type="checkbox"/> 1. List Editor>Schedule>Calendar <input type="checkbox"/> 2. Click New <input type="checkbox"/> 3. Enter the information under the Calendar tab (Name, Provider, Service Site, Start Time, End Time, and Display interval) Skip the Calendar Template Assignment Tab for now. <input type="checkbox"/> 4. List Editor>Schedule> Calendar Template <input type="checkbox"/> 5. Complete the basics of the template details including: Name, Template length in days (generally 7), Start time, End time, Display interval, and possibly color <input type="checkbox"/> 6. Click the Time Slot Tab <input type="checkbox"/> 7. Be sure to set the starting date as a Sunday for 7 day templates <input type="checkbox"/> 8. To block a complete day like Sat or Sun click the hyperlink to the date at the top of the column and uncheck office open. <input type="checkbox"/> 9. For the remaining template click on specific time slots that have specific Appointment Slots (ex: from 9-10 only established patient visits). If the time slots are not specific to appointment types, leave them blank. <input type="checkbox"/> 10. Block lunch times and other permanent time blockings ex: office meetings, etc. <input type="checkbox"/> 11. Click Ok <input type="checkbox"/> 12. Go back to the Calendar (List Editor>Schedule>Calendar> Calendar Template Assignment Tab. <input type="checkbox"/> 13. Click on a Sunday to begin the template (Click on the Dark Blue Date) <input type="checkbox"/> 14. Click New Template Assignment <input type="checkbox"/> 15. Select the Template to Open, Make the template Continuous with no end date, Click OK <p>To Modify an existing Template</p> <ul style="list-style-type: none"> <input type="checkbox"/> 1. Design a new Calendar Template <input type="checkbox"/> 2. Go to the Calendar (List Editor>Schedule>Calendar>Calendar Template Assignment) <input type="checkbox"/> 3. Click on the date to start a new template Click Hide this Calendar's Template <input type="checkbox"/> 4. Click on the date again and select New Calendar Template. <input type="checkbox"/> 5. Select the Template to Open, Make the template Continuous with no end date, Click OK <p>** To add a specific template to a range of dates such as temporary Saturday appointments, Create a Template and Open the Template Weekly vs. Continuous**</p>	