Calendar Schedule

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Version 14.19

This window map article points out some of the important aspects of the window you're working with in OP but is not intended to be instructional. To learn about topics related to using this window, see the **Related Articles** section at the bottom of this page.

Our new Multi-Location Calendar updates are here! Please see the **OP 21.3 release notes** for an overview and a list of the known minor issues, which our development teams are actively working to resolve. We plan to release these fixes soon!
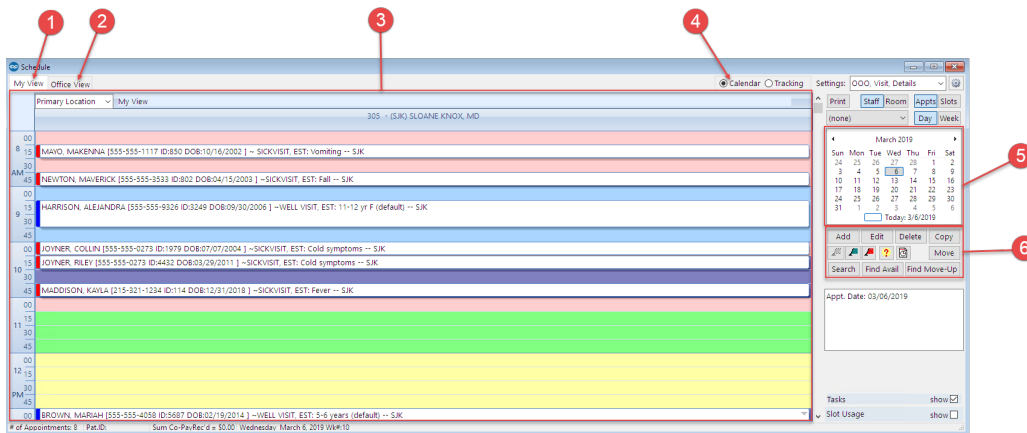
In the interim, practices can

- Configure OP to **switch to the new calendar** and explore its features, *or*
- Take no action and continue using the current one until the fixes are released.

About the Calendar Schedule Tab

Path: Clinical, Practice Management, or Billing tab > Schedule button

The Calendar Schedule window is used for scheduling and editing appointments. While in the Calendar tab, you can view, search, and print the schedule.

Calendar Schedule Map

Number	Section	Description
1	My View tab	The My View tab is a customized view for the user currently logged into OP. The view can be customized to match each staff member's needs depending on their role and duties. For example, if a user only manages the schedule for one provider, then the My View tab can be customized to reflect that schedule.
2	Office View tab	The Office view tab displays the schedule for all the providers in the practice. This is a common view for all OP users and is typically configured by the Office Manager. Changes made to this view will affect all users.

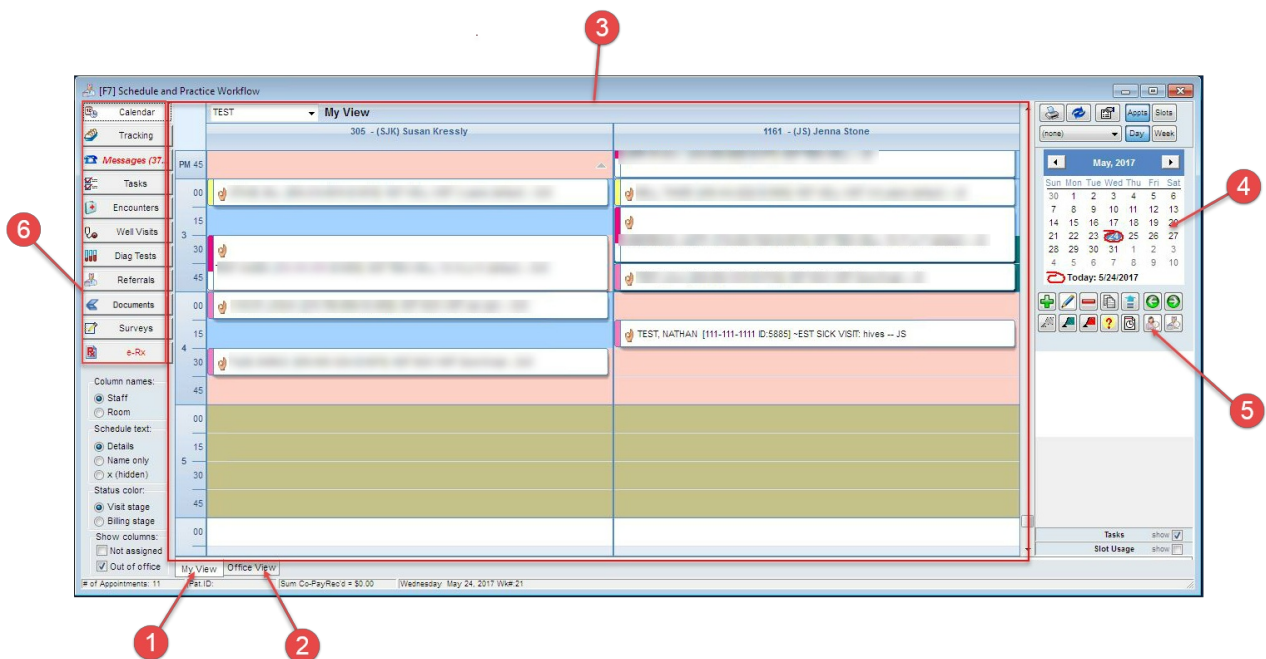| 3	Schedule	The schedule is the main focus of the calendar screen. You can create new appointments or edit existing appointments in the schedule. Each practice typically follows a predetermined schedule template. Using color blocks, the template guides users to schedule appointments according to the practice's routine. For example, well visits could be set for the top of each hour while sick visits are set for the remainder of the hour.
4	Calendar Radio button	The Calendar radio button displays the calendar view in the Schedule and Practice Workflow window.
5	Calendar	The calendar is a digital calendar that is used to select a specific date on the schedule. The date identified with a blue square is the current date.
6	Calendar Toolbar	The calendar toolbar (located directly beneath the calendar) is used to perform the following functions: create an appointment, modify an appointment, delete an appointment, copy an appointment, move an appointment, move forward or backward in the calendar (week, month, year), clear or set a flag (red or green), toggle appointment status, toggle reminder status, keyword search the schedule, find an available time block, and find a Move-up Option.

Version 14.10

About the Schedule and Practice Workflow: Calendar Tab

Path: Smart Toolbar > Schedule button > Calendar tab

The Schedule and Practice Workflow combines a number of forms to help you get your work done faster and more efficiently. The Schedule and Practice Workflow consists of a calendar, patient tracking, messages, a task list, encounter information, well visit information, diagnostic tests, referrals, documents, surveys, and a patient prescription queue.

The calendar tab is used for scheduling and editing appointments. While in the calendar tab, you can view, search, and print the schedule.

Schedule and Practice Workflow: Calendar Window Map

Number	Section	Description
1	My View Tab	The My View tab is a customized view for the user currently logged into OP 14. The view can be customized to match each staff member's needs depending on their role and duties. For example, if a user only manages the schedule for one provider, then the My View tab can be customized to reflect that schedule.
2	Office View Tab	The Office view tab displays the schedule for all the providers in the practice. This is a common view for all OP 14 users and is typically configured by the Office Manager. Changes made to this view will affect all users.
3	Schedule	The schedule is the main focus of the calendar screen. You can create new appointments or edit existing appointments in the schedule. Each practice typically follows a predetermined schedule template. Using color blocks, the template guides users to schedule appointments according to the practice's routine. For example, well visits could be set for the top of each hour while sick visits are set for the remainder of the hour.
4	Calendar	The calendar is a digital calendar that is used to select a specific date on the schedule. The red circle signifies the current date. Click the red circle to quickly return to the current date.
5	Calendar Toolbar	The calendar toolbar (located directly beneath the calendar) is used to perform the following functions: create an appointment, modify an appointment, delete and appointment, copy an appointment, move and appointment, move forward or backward in the calendar (week, month, year), clear or set a flag (red or green), toggle appointment status, toggle reminder status, keyword search the schedule, and find an available time block.
6	Left tabs	The left tabs open a different section within the practice's schedule and practice workflow. The Schedule and Practice Workflow contains the following left tabs: **Calendar** **Tracking** **Messages** **Tasks** **Encounters** **Well Visits** **Diagnostic Tests** **Referrals** **Documents** **Surveys** **e-Rx**