

Add Staff/Resources to a Calendar View

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Version 21.3




Our new Multi-Location Calendar updates are here! Please see the [OP 21.3 Calendar Articles](#) for an overview of the changes. Practices can configure OP to [switch to the new calendar](#) and explore its features.

About

In order for Providers, Staff, or Rooms/Resources to be listed on the calendar for scheduling, they must be added in the **Schedule Properties for Highlighted Calendar** window. Below, you'll learn how to set up your Calendar views so that the necessary columns are displayed.

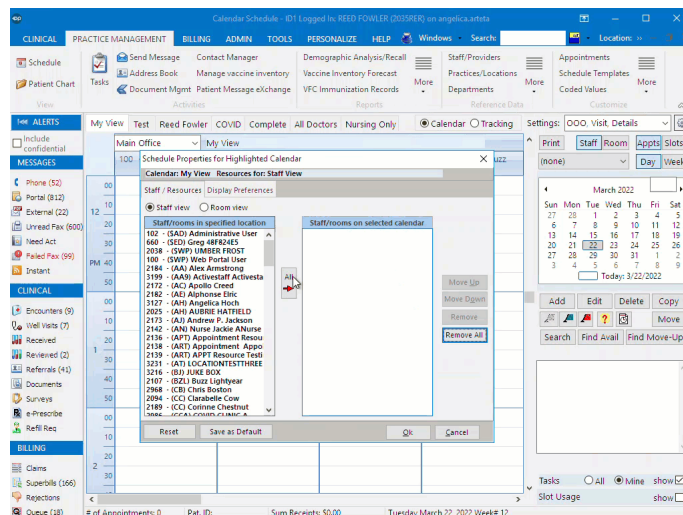
Add Staff/Resources to Calendar View

1. Navigate to the Schedule: **Clinical, Practice Management, or Billing tab > Schedule button**
2. Select the **Calendar** tab for which you will add Staff or Resources.
3. Ensure that the **Calendar** radio button is selected so that you are viewing the **Calendar Schedule** window.
4. Click the **Schedule Properties** button . The **Schedule Properties for Highlighted Calendar** window opens to the **Staff/Resources** tab.
5. Select from the following options:
 - **Staff View:** Used to add Providers or staff members to the calendar by name
 - **Room View:** Used to add Rooms or Resources to the calendar as established in the **Rooms/Resources** tab of the **Appointment Types and Zones** window.
6. In the **Staff/rooms in specified location** section of the window, select a Staff Member or Resource that should be added to the Calendar view.



Note: If the Staff Member has just been added to the Staff/Provider Directory they may not be visible in the **Staff/rooms in specified location** panel. You'll need to log out and back into OP for the list to be refreshed.

7. Drag your selection and drop it in the **Staff/rooms on selected calendar** section of the window. Repeat this process for all Staff/Resources that should be added to the Calendar view. To move all Staff/Resources to the selected calendar, click the **All Arrow** button located between the two sections of the window.





Note: The drag and drop process can be used in the opposite direction to remove Staff/Resources from the selected calendar.


- (Optional) Use the **Move Up**, **Move Down**, **Remove**, or **Remove All** buttons to customize how the names are displayed on the calendar. The listing of Staff/Resources is displayed from left to right in the order they are listed in the window.
- Click **OK** to save the properties.

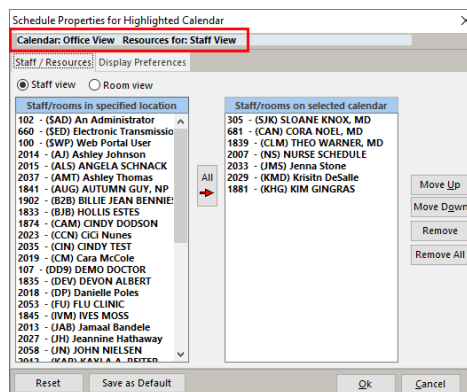
Version 20.15

Overview

In order to see providers, staff, or rooms/resources listed on the calendar for scheduling, they must be added in the **Schedule Properties for Highlighted Calendar** window. The steps below instruct users on how to set up your Calendar views so that the necessary columns are displayed.

Add Staff/Resources to Calendar View

- In the **Clinical**, **Practice Management**, or **Billing** tab, click the **Schedule** button.
- Select the **Calendar View** tab for which you will add staff or resources.
- Ensure that the **Calendar** radio button is selected so that you are viewing the **Calendar Schedule** window.
- Click the **Schedule Properties** button . The **Schedule Properties for Highlighted Calendar** window opens to the **Staff/Resources** tab indicating the Calendar tab and Resource selection.



- Select from the following options:
 - Staff View:** to add staff members or provider to the calendar by name.
 - Room View:** to add rooms or resources to the calendar as established in the **Rooms/Resources** tab of **Appointment Types and Zones** window.
- From the **Staff/rooms in specified location** section of the window, select a staff member or resource that should be added to the calendar view.



Note: If the staff member has recently been added to the Staff/Provider directory they may not be visible in the **Staff/rooms in specified location** panel, you must logout of OP and log back in.

- Drag that selection and drop it in the **Staff/rooms on selected calendar** section of the window. Repeat this process for all staff/resources that should be added to the calendar view.
 - To move all staff/resources to the selected calendar, click the **All Arrow** button located between the two sections of the window.



Note: Once a staff/resource has been moved to the selected calendar, users may use the **Move Up**, **Move Down**, **Remove**, or **Remove All** buttons to customize how the names are displayed on the calendar. The listing of staff/resources appear from left to right in the order they are listed in the window.

8. Click **OK** to save the properties.