

## Monthly View

The monthly view offers a powerful way in which to efficiently book appointments. Your monthly view can be accessed from the main scheduler screen by clicking on the M icon;

Accessing The Monthly View

To access the monthly view, simply click on the M icon. If booking an appointment you can first select the patient you want to book and then go to the monthly view, or first go to the monthly view to select a date and time and then select the patient

Time	Name	Reason for a Visit	Stat.	Loc	ID	CNF
9:00 AM			OF			
9:15 AM			OF			
9:30 AM			OF			
9:45 AM			OF			
10:00 AM	Adamson, Jennifer	Botox	ARR	OF	BB	
10:15 AM			OF			
10:30 AM			OF			
10:45 AM			OF			
11:00 AM			OF			
11:15 AM			OF			
11:30 AM			OF			
11:45 AM			OF			
12:00 PM		Lunch				
12:15 PM		Lunch				
12:30 PM		Lunch				
12:45 PM		Lunch				
1:00 PM			OF			
1:15 PM			OF			
1:30 PM			OF			
1:45 PM			OF			
2:00 PM			OF			
2:15 PM			OF			
2:30 PM			OF			
2:45 PM			OF			
3:00 PM			OF			
3:15 PM			OF			
3:30 PM			OF			
3:45 PM			OF			
4:00 PM			OF			
4:15 PM			OF			
4:30 PM			OF			
4:45 PM			OF			

Note: To book an appointment using the monthly view you can either first select a patient and then go to the monthly view to select a date and time or you can first go to the monthly view, select your date and time and then select the patient. However this does not apply to multiple appointments using the monthly view for the same patient. If you wish to book multiple (more than 1) appointments for the same patient you must first select the patient AND indicate the appointment reason and then go to the monthly view.

## Using The Monthly View - Single Appointment

Provider, month, year and location default from the scheduler. You can select another provider, change the month, year and location using the pull down buttons or spinner buttons.

Appointments already booked display as a colored box with a number. The number represents how many appointments are booked at that same time slot. The color defaults to red, otherwise it uses the appointment reason color.

Block times appear as bands of color with no numbers. Colors are determined by the user when making a block time (e.g. red from 12 - 1pm for lunch). Block times can be used to indicate times not appropriate for appointments or times for particular types of appointments.

Double click on a date and time that has an appointment to display the appointment details.

C button will display Surgeon's Colors (used for OR booking).

Today button returns to today's date in the monthly view. Reset button resets monthly view to the default provider from the scheduler. Return button and close button are used to close the monthly view.

Refresh button will update the monthly view to show any appointments added by other users.

Select a time and date by clicking on it. Press the ENTER key on your keyboard to confirm the selected date and time and return to the scheduler. You can use a right-click on your mouse to instantly select and confirm an appointment date and time. Note that your monthly view remains open (but minimized). Remember to refresh the view so as to display any appointments added.

The monthly view will default to the current provider on the scheduler. It also defaults to the current month and year. The monthly view displays available time slots, shown as blank squares on the grid. If a time and date are already booked, the spot is coloured (default colour is red) either in the default colour or the colour as assigned by the appointment reason. In addition the square will have a number that is visible. This represents the number of patients booked in that time slot. There may also be blocked off times indicating day's not working, lunch, out of office, etc. These are assigned by the provider schedule setup and block times (note that block times may represent times not available for booking an appointment but can also indicate times assigned for a specific type of appointment or times assigned for a surgeon/provider (if the provider is defined as a room). The monthly view visually displays your schedule for a month at a time allowing users to quickly spot openings. You can easily change the provider within the monthly view using the pull down button next to the provider name. Likewise, you can change the month, year and location (if using multiple locations).

For ease of moving around there are three navigation buttons:

**TODAY** – Returns to the current date. Useful if you find yourself looking a few months in the future and need to get back to today's date.

**RESET** – Returns to the current date and current user. Useful if you find yourself looking a few months in the future and on another provider's schedule and need to get back to today's date and the present provider.

**REFRESH** – In network environments with many people booking appointments, the refresh key will display any appointments booked by other users. Note that each time you close and open the monthly view, it is instantly refreshed. However, while in the view another user may book a time slot while you're looking around. The refresh will show this.

There are several ways to select an appointment date and time;

1. Click on the time and date you want and then press the ENTER key. This returns you to the main scheduler with that date and time selected. The monthly view remains open and is simply minimized.
2. Right click on the date and time you want. This returns you to the main scheduler with that date and time selected. The monthly view remains open and is simply minimized.
3. Click on the time and date you want and then click on the RETURN button. This returns you to the main scheduler with that date and time selected. The monthly view is closed.

### Other Functions The Monthly View Can Do:

The monthly view can also display details and even be used to edit existing appointments. If you want to check the details on a booked time slot, simply double click on it and the appointment details will display. You can even edit an appointment at this point.

If the provider is a room, you can assign segments of the room to various providers (works with operating room scheduling and staff/surgeon setup tables). Since surgeons can have colours assigned to them, these will appear as block times on the monthly view. The C button displays the surgeons assigned colours.

### Special Monthly View Function – Booking Multiple Appointments:

To book multiple appointments for a patient you must first select the patient on the scheduler and indicate the reason before opening the monthly view. Once in the monthly view, simply indicate you want to do multiple appointments (via the multiple appointments flag) and then simply click the dates and times you want. Note that you can book multiple appointments over multiple months;

Once displayed, simply click on the save appointment button to save all appointment dates and times selected.

Monthly View - Multiple Appointments

Do multiple appointments, first select the multiple appointment flag and then click on the appointment dates and times you want. The selected date and times are marked with an X.