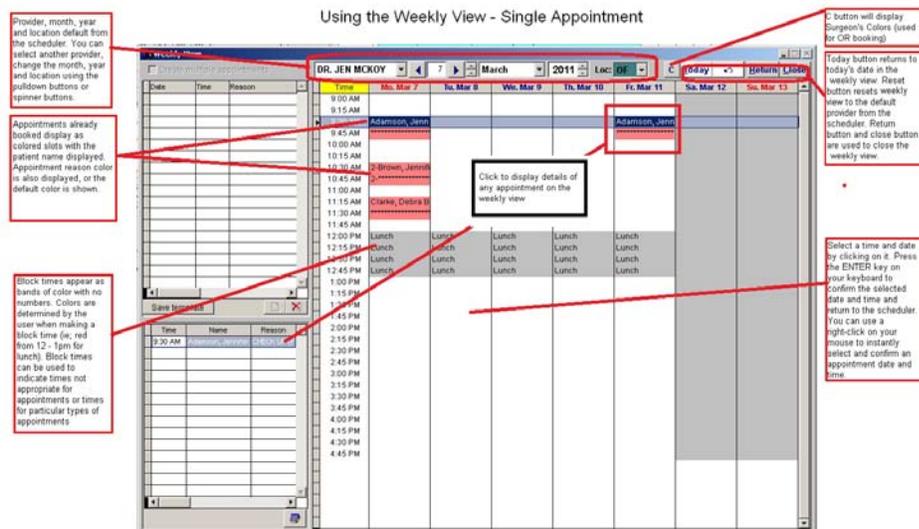## Weekly View

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

Accessing The Weekly View

Note: To book an appointment using the weekly view you can either first select a patient and then go to the weekly view to select a date and time or you can first go to the weekly view, select your date and time and then select the patient. However this does not apply to multiple appointments using the weekly 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 weekly view.

Using the Weekly View - Single Appointment

The weekly view will default to the current provider on the scheduler. It also defaults to the current month and year. The weekly 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 slot will display the patient's name. If there is more than 1 appointment booked in the same time slot, then the slot will indicate the number of appointments, and display the first patient booked. 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 weekly view visually displays your schedule for a week at a time allowing users to quickly spot openings. You can easily change the provider within the weekly view using the pull down button next to the provider name. Likewise, you can change the week, month, year and location (if using multiple locations).

For ease of moving around there are two 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.

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 weekly view closes.

2. Right click on the date and time you want. This returns you to the main scheduler with that date and time selected. The weekly view closes.

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 weekly view is closed.

Other Functions The Weekly View Can Do:

The weekly 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 Weekly 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 weekly 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;

Using the Weekly View - Multiple Appointments