

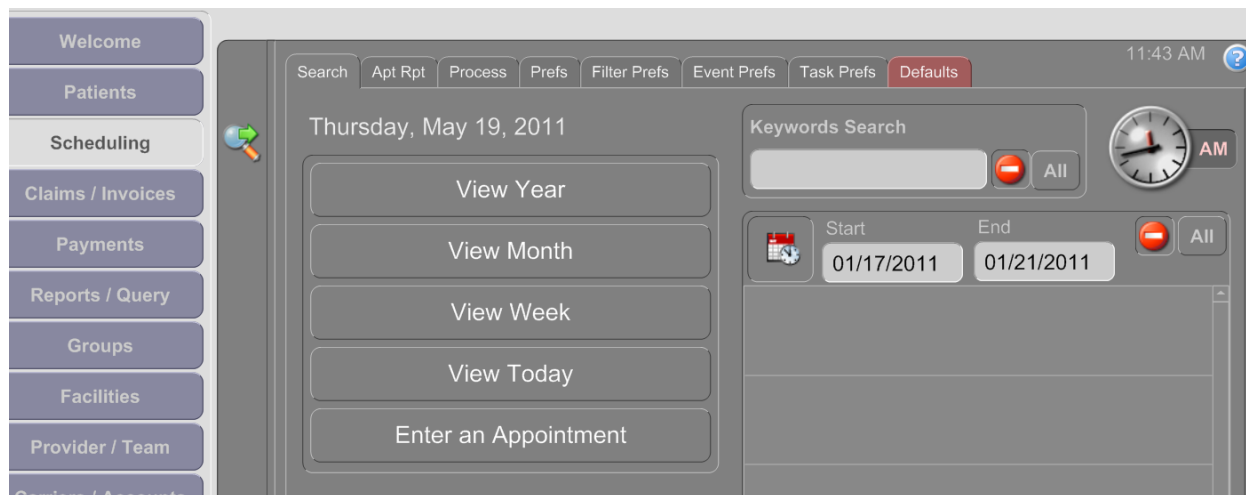
Scheduler – Viewing Appointments



Viewing Appointments

Go to the **Scheduling** menu to view appointments.

- Click on one of the buttons labeled **“View Year”**, **“View Month”**, **“View Week”**, or **“View Today”**.

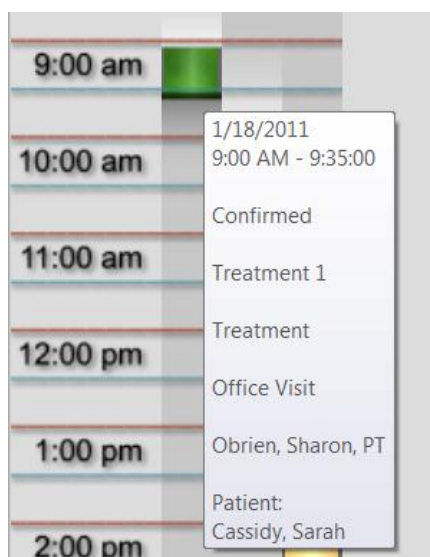


- By clicking the **“All”** button in the under **“Set Filter to”** on the left, you will see all events for all provider/team members and all criteria for that specific day. You can select different days using these options to see what is booked within those date ranges.

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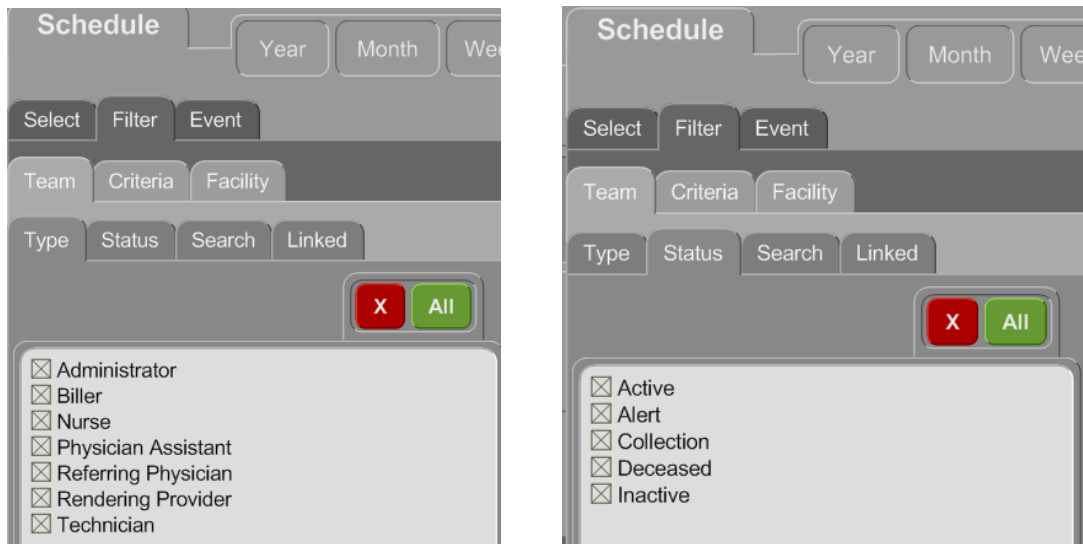


- Holding the mouse over the individual item will bring up a tool tip to give you some quick information about the appointment.



- From the **Filter** tab, you can filter appointments by Provider/Team member, by Type and Status and by Facility.
- On the **Team** tab you can filter Provider/Team members by Type and Status.

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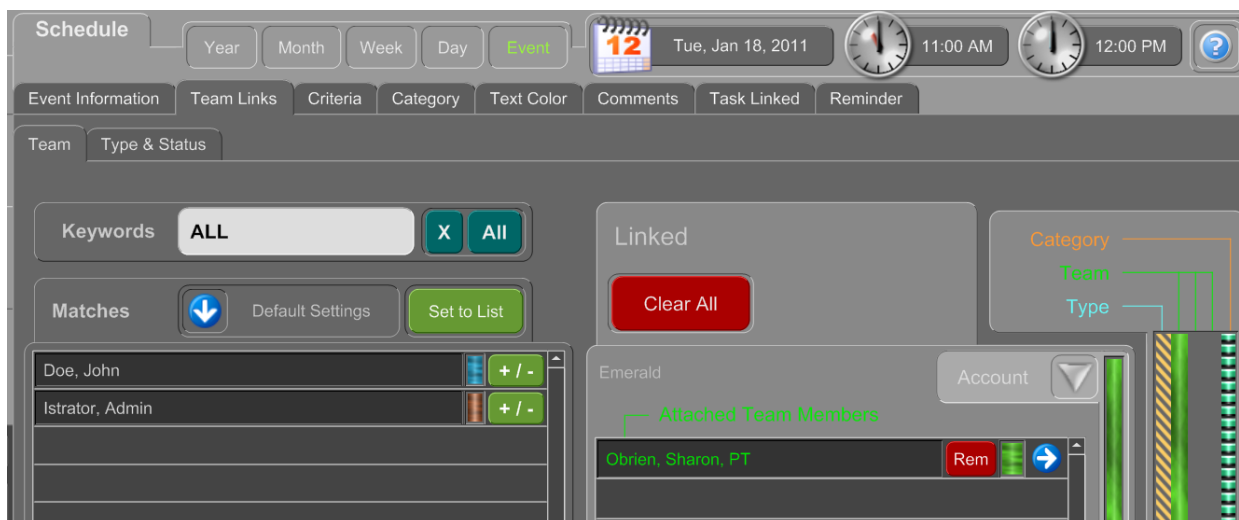


- On the **Search** tab, you can select a Provider/Team member to add or remove from the search list by clicking on the names individually. Name highlighted in green are included. You will see the events displayed on the right.

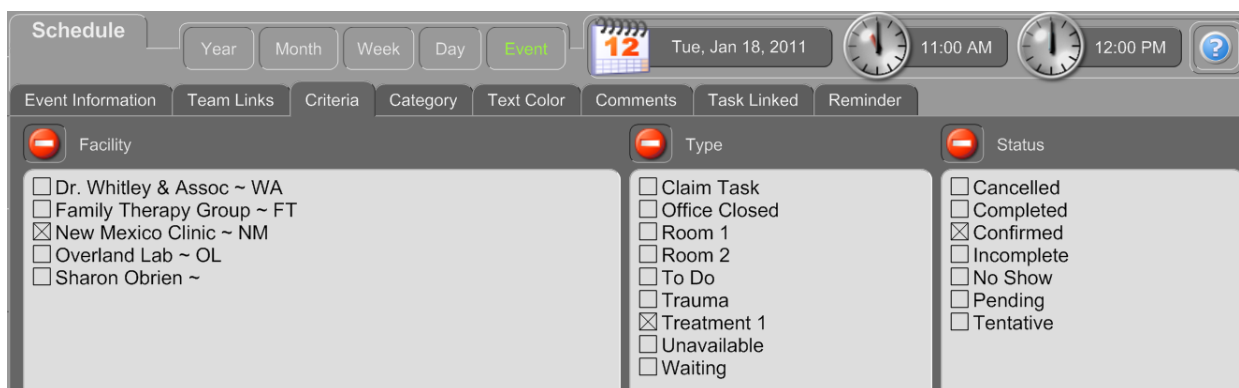


- The **Team Links** tab is another, more advanced way of viewing and attaching different provider team members to a given event.

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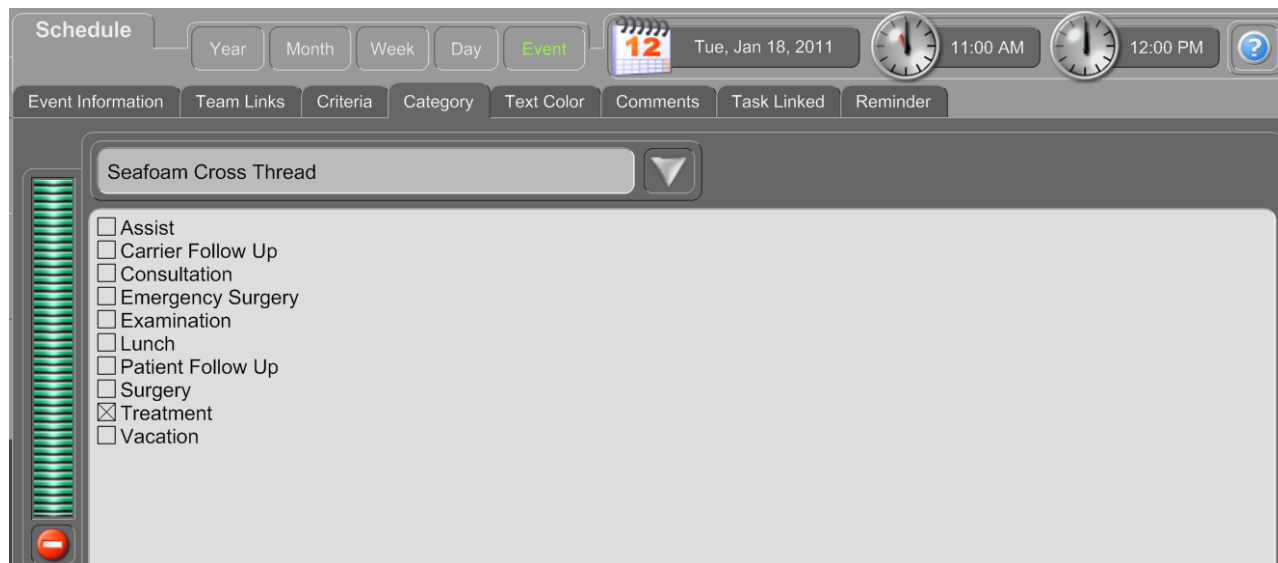


- The **Criteria** tab allows you to filter events by “Facility”, “Type” and “Status”. It is a very important area to make sure these options are set correctly. You can select more than option. More “Type” and “Status” options can be added in the Scheduler preferences.



- On the **Category** tab you can set a category. The category will not be filtered, but it is an additional way of categorizing your event. You can attach a color pattern to this event by selecting it from this list.

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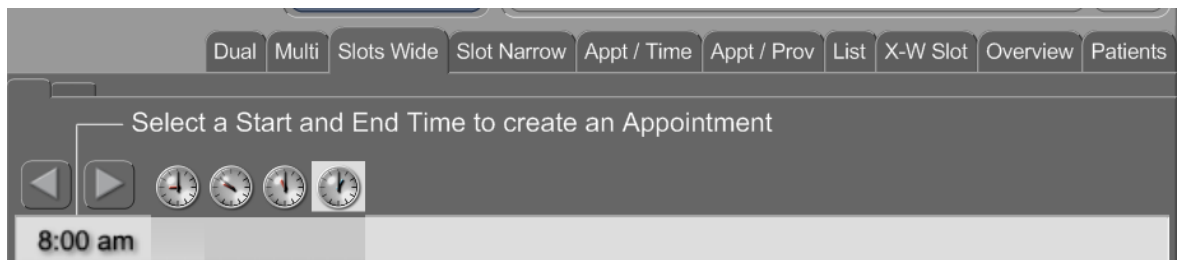
- The **Text Color** tab allows you to set the text color. Text color is only visible on certain screens, but it is another way of categorizing an event by how it displays.



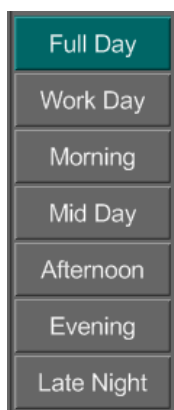
- There are several ways you can view the information for a specific day, as shown on the various tabs at the top of the Schedule **Day** view: **Dual, Multi, Slots**

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Wide, Slot Narrow, Appt/Time, Appt/Prov, List, X-W Slot, Overview and **Patients**. Click on these tabs to view the data in various layouts. The **Patients** tab, for example, shows you the patients that are linked to these appointments.

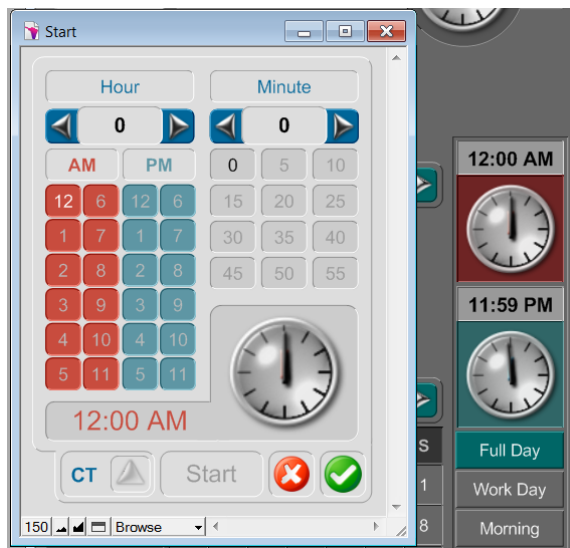


- You can also view the appointments within a certain time range. For instance, if you only want to see your morning appointments, by clicking the **Morning** button, you will only see the appointments that occur in the morning.

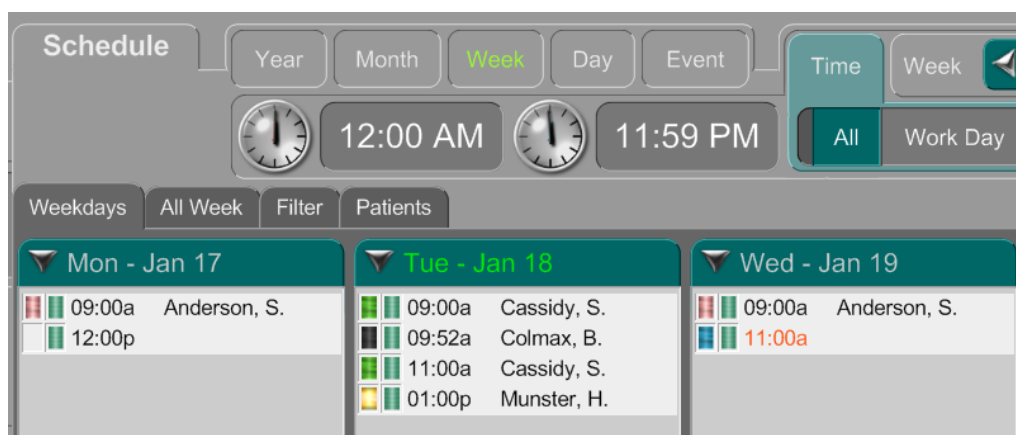


- You can also set the clocks to an exact time range to view appointments.

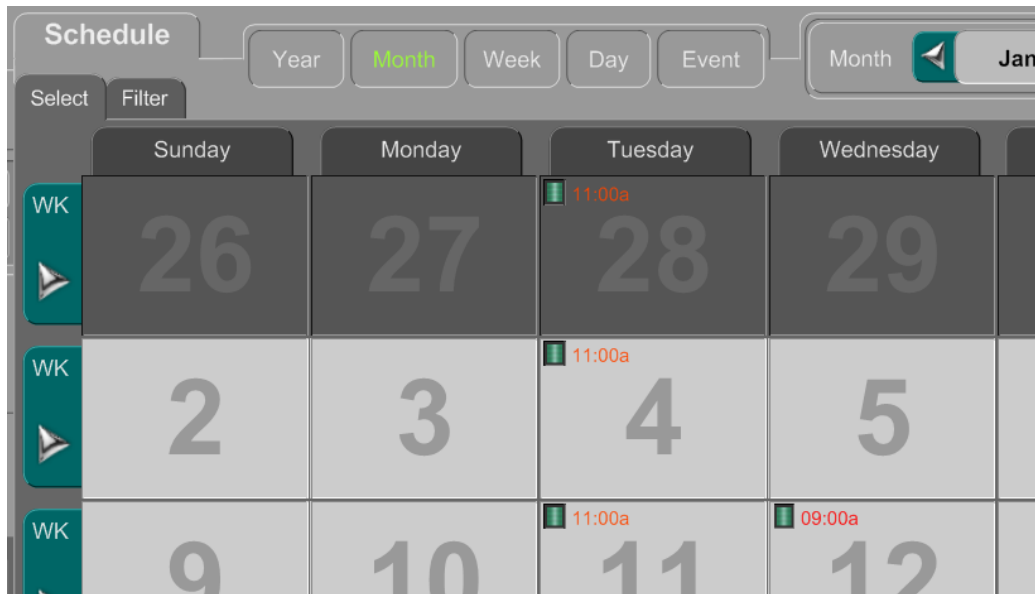
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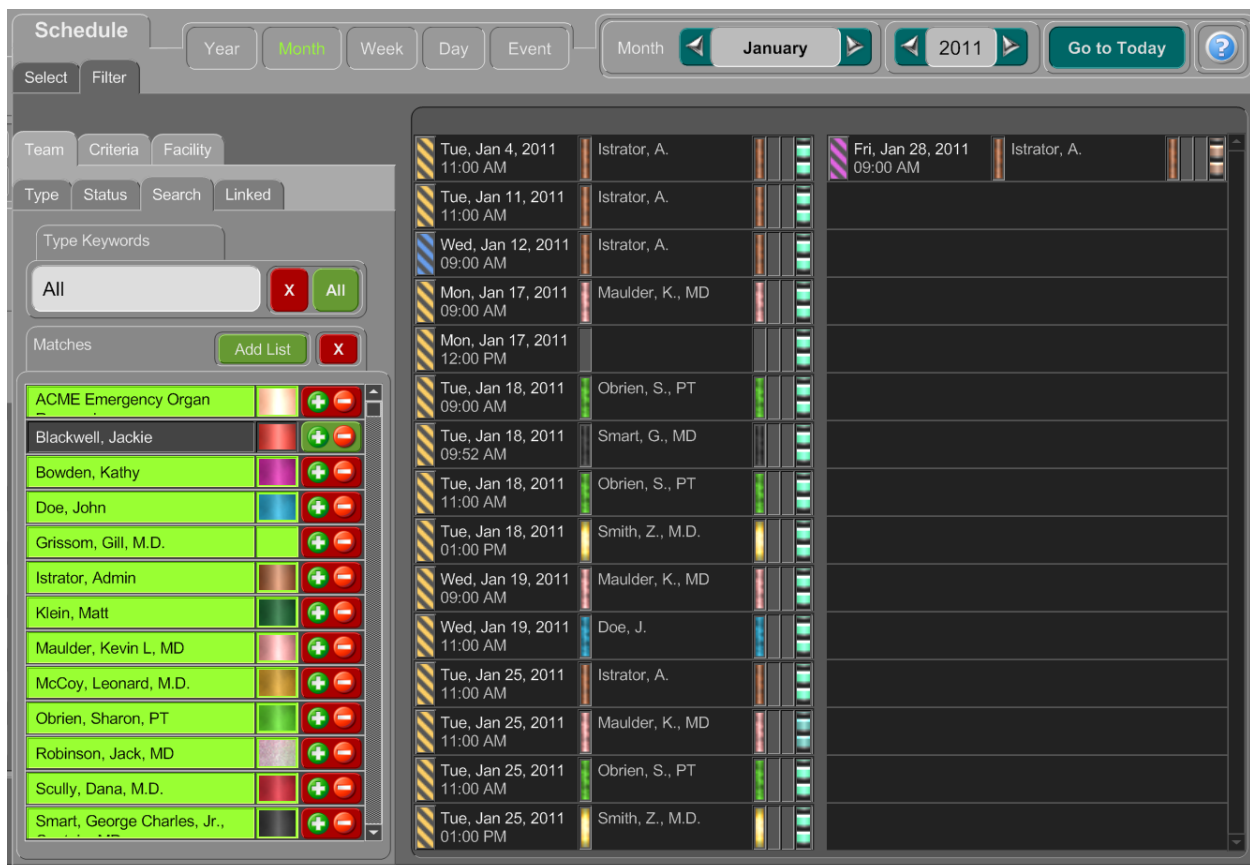
- You can view appointments by the week, or by the month by clicking on the **Week** button, or the **Month** button. By clicking on a specific week in the month view, you will go directly to the week view for that selected week. By clicking on a specific day in the week view, you will go to that specific day.



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- On the month view, on the **Filter** tab, you can set the filter criteria for all of the appointments within that month.



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- On the week view, on the **Filter** tab, you can set the filter criteria for all of the appointments within that week. You can view the patients that are scheduled within that time frame, based on these filter criteria.
- You can choose to view appointments for the Work Day, Morning, Midday, Afternoon, Evening, Late, or All on both the week and the month views. You can set the clocks to exact range of times to view appointments as well.

