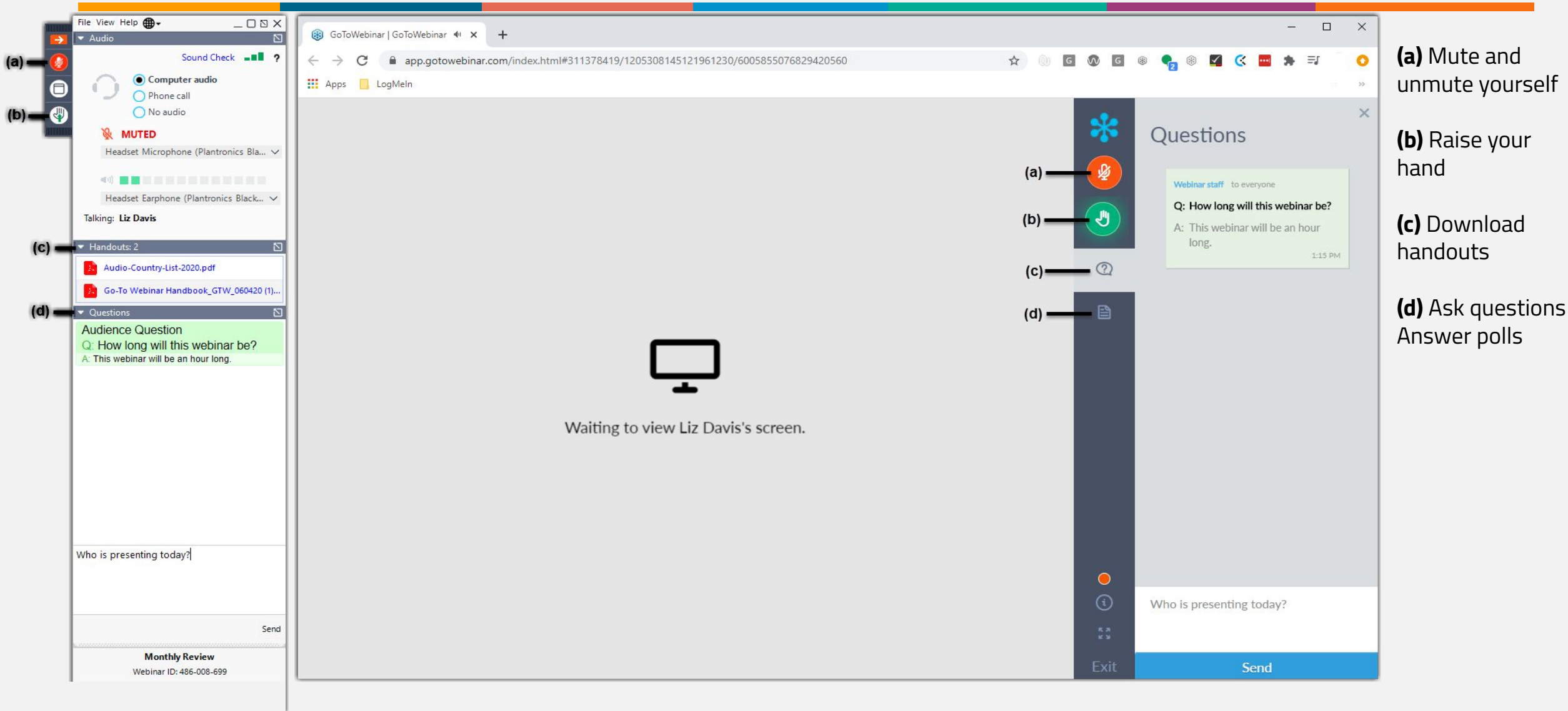




Expanded Calendar Functionality



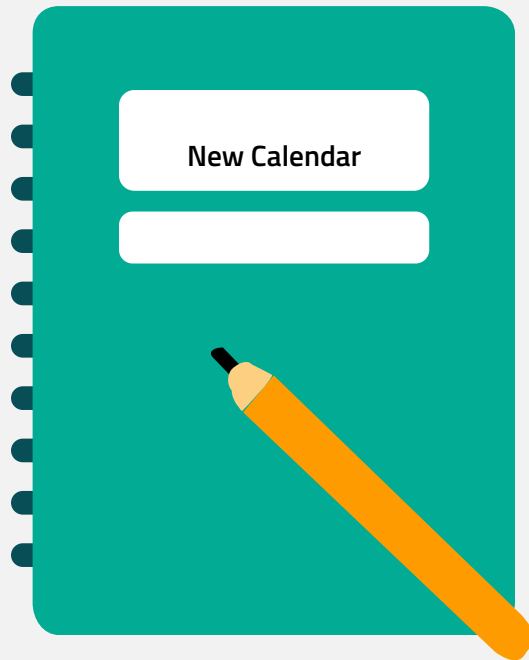
Navigating GoTo



The screenshot shows the GoTo Webinar interface. On the left, a Windows taskbar shows the audio control panel with annotations (a) for mute/unmute, (b) for raise hand, (c) for handouts, and (d) for questions. The main window shows a browser with the GoTo Webinar URL and a central area with a monitor icon and the text "Waiting to view Liz Davis's screen." On the right, a sidebar contains a "Questions" panel with a question and answer, and a "Who is presenting today?" section. A legend on the far right maps the annotations (a-d) to their functions: (a) Mute and unmute yourself, (b) Raise your hand, (c) Download handouts, and (d) Ask questions Answer polls.

- (a) Mute and unmute yourself
- (b) Raise your hand
- (c) Download handouts
- (d) Ask questions Answer polls

Agenda



- 1 About**
What's the New Calendar all about?
- 2 Highlights & Visual Changes**
What to Expect
- 3 Multi Location Setup**
Setup for Success

About



Zone Names

1

Timeslot can contain the name of the zone for intended appointment types

Hints

2

Wave-over hints make it easy to see full event details on crowded days without having to open the appointment.

Multi-Location

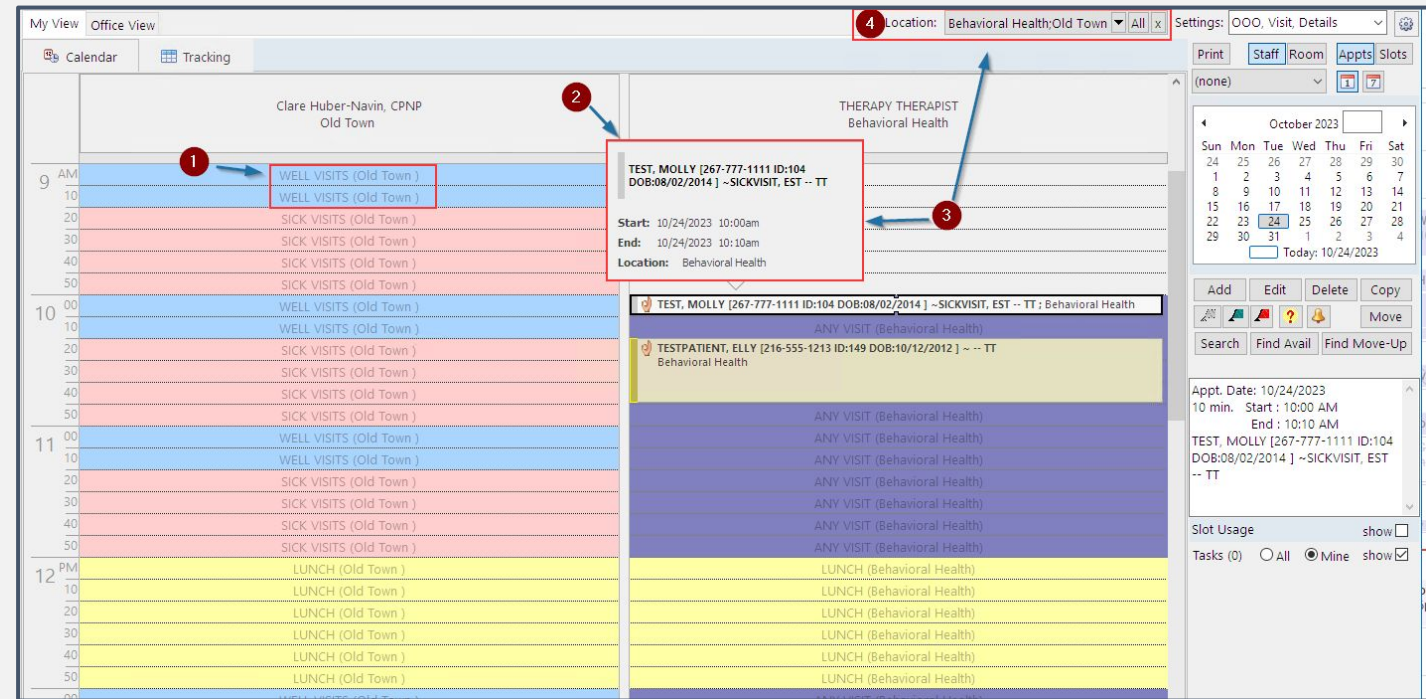
3

In multi-location mode, both time slots and appointments contain location name, to avoid confusion about what is happening where

Calendar Views

4

Single calendar view can contain multiple locations simultaneously.



The screenshot displays the 'Office View' interface. The main calendar area shows a grid of time slots for two locations: 'Clare Huber-Navin, CPNP Old Town' and 'THERAPY THERAPIST Behavioral Health'. The calendar is color-coded by appointment type: blue for 'WELL VISITS (Old Town)', pink for 'SICK VISITS (Old Town)', and yellow for 'LUNCH (Old Town)'. A red box highlights a 'WELL VISITS (Old Town)' appointment at 10:00 AM, with a red circle '1' pointing to it. A red box also highlights the appointment details pane for this appointment, with a red circle '2' pointing to the pane header and a red circle '3' pointing to the appointment details. A red box highlights the 'Location' dropdown menu in the top right corner, with a red circle '4' pointing to it. The appointment details pane shows the patient name 'TEST, MOLLY [267-777-1111 ID:104 DOB:08/02/2014] -SICKVISIT, EST -- TT', the start and end times (10:00 AM), and the location 'Behavioral Health'. The right sidebar shows a calendar for October 2023, a search bar, and a 'Slot Usage' section.

Display Preferences

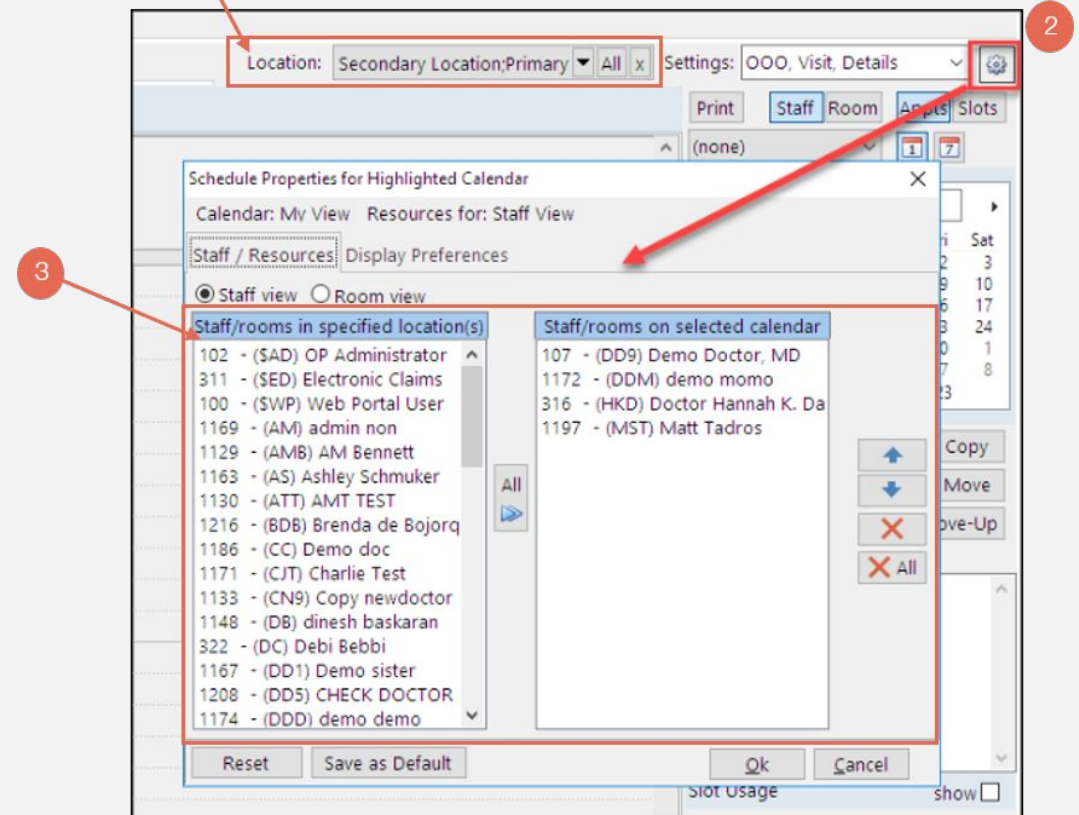
Update display Preferences

Disclaimer: You will need to re-select the Staff/Resources and the Display Preferences for the new location combinations even if you have set them before.

- **Note:** Clicking the Save as Default button will only save the Display Preferences for the remaining configurations, and you still must select the Staff/Resources for each location combination.

Prime Time Hours

- Prime time hours are now only included where previously you saw non-prime time.
 - If needed, block out the Prime Time Hours using an appointment zone of Do Not look or something of the like ie. Hospital Rounds



Location: Secondary Location;Primary All x Settings: OOO, Visit, Details

Print Staff Room Appts Slots

Schedule Properties for Highlighted Calendar

Calendar: My View Resources for: Staff View

Staff / Resources: Display Preferences

Staff view Room view

Staff/rooms in specified location(s)

102 - (SAD) OP Administrator
311 - (SED) Electronic Claims
100 - (SWP) Web Portal User
1169 - (AM) admin non
1129 - (AMB) AM Bennett
1163 - (AS) Ashley Schmuker
1130 - (ATT) AMT TEST
1216 - (BDB) Brenda de Bojorq
1186 - (CC) Demo doc
1171 - (CJT) Charlie Test
1133 - (CN9) Copy newdoctor
1148 - (DB) dinesh baskaran
322 - (DC) Debi Bebbi
1167 - (DD1) Demo sister
1208 - (DD5) CHECK DOCTOR
1174 - (DDD) demo demo

All

Staff/rooms on selected calendar

107 - (DD9) Demo Doctor, MD
1172 - (DDM) demo momo
316 - (HKD) Doctor Hannah K. Da
1197 - (MST) Matt Tadros

Copy Move Move-Up

Reset Save as Default Ok Cancel

Slot Usage show

Scheduler Settings

Update Scheduler Settings

For **EACH** scheduler configuration, the following must be completed:

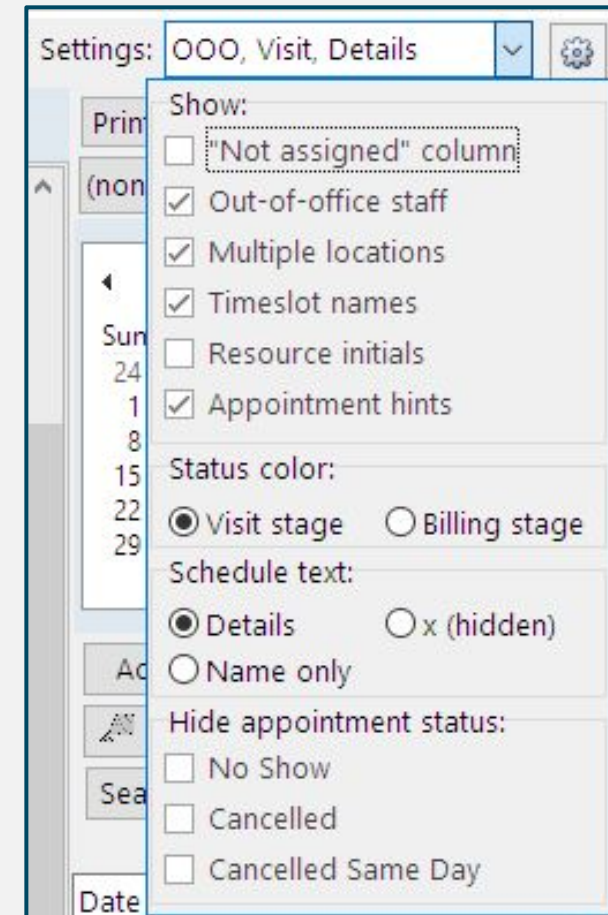
- **Select**, or **de-select**, each item you need for the calendar configuration you are working on.

New Items Added:

- Multiple Locations
- Timeslot Names
- Appointment Hints

Recently added

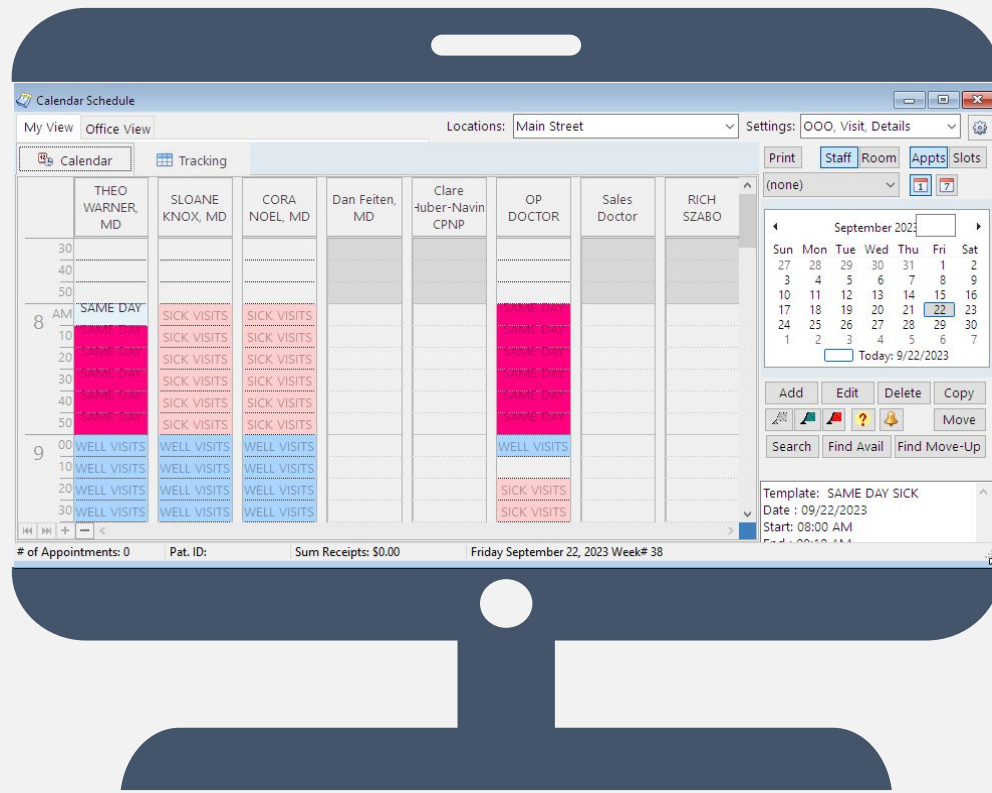
- No Show
- Cancelled
- Cancelled Same Day





Multi-Location Practices

Setup Requirements



1

Appointment Zones

Must Schedule with Appointment Zones

2

Enable

Enable the New Calendar Component

3

Display Preferences

Update Display Settings for Each Location Combination

4

Schedule Settings

Update Scheduler Settings

Appointment Zones

Requirement

Clean-up Tip: In order for the multi-location functionality to work in the New Calendar, a provider can only have a *single bookable Appointment Zone filled across all locations at any given time*.

- Bookable zones have a purpose of *anything except* "Do Not Book".
- For multi-location practices that have used non-bookable zones such as "Out of Office" to indicate where a provider is not working at a specific location on a specific day: if these overlap with a bookable zone then they will be suppressed and the bookable zone will display.

Tip: Verify if there are overlapping zones using Slot mode.

If you have overlapping bookable zones you will need to clean-up the schedule [templates](#) or [slots](#) in order to effectively use the new calendar.

For example, you will need to ensure the purpose of "In other location" zones are set to "Do Not Book". For more information, see the [Appointment Zones](#) article on how to update the Zone purpose.

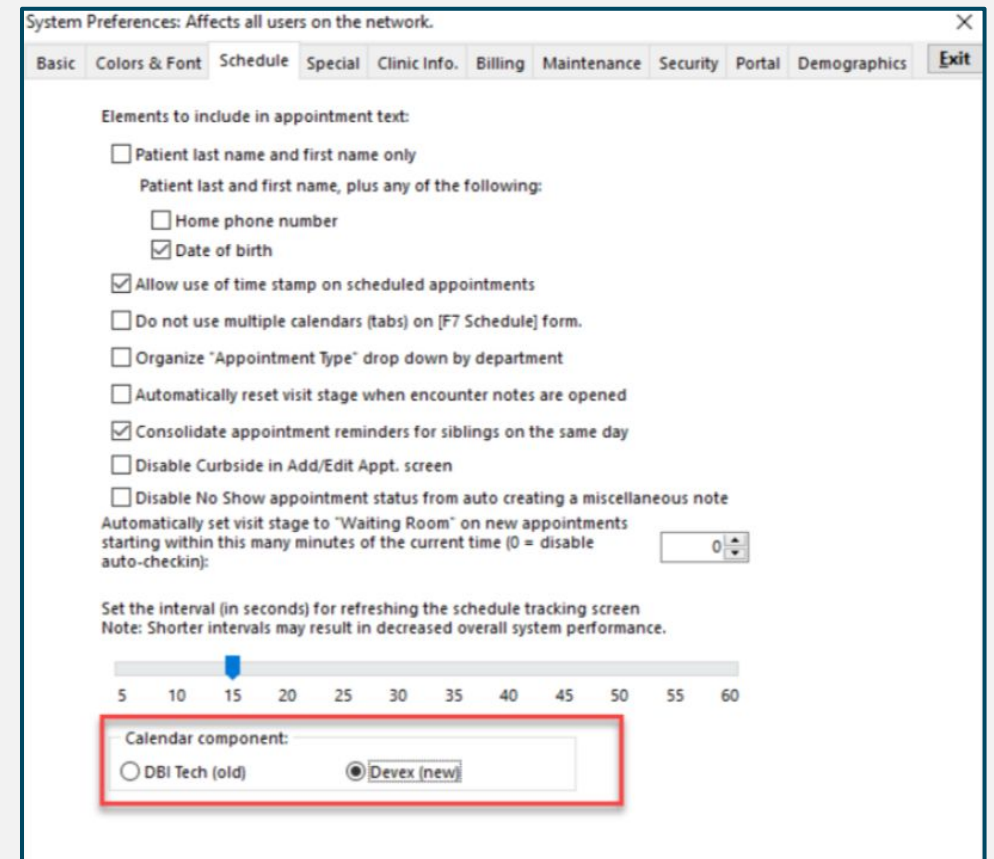


Appointment Zone	Zone Color	Protection Status	Purpose	Max Appts
ANY VISIT		Not Protected	Any Encounter	
CONSULTS		Not Protected	Consultation	0
DO NOT BOOK	Do Not Book	Staff Protected	Do Not Book	0
HOSPITAL ROUNDS	Blue	Staff Protected	Do Not Book	0
IN OFFICE PROCEDURES	Fuchsia	Not Protected	Procedures	0
LUNCH		Staff Protected	Do Not Book	0
NURSE VISIT		Not Protected	Nurse-Only Encounter	0
PHONE TIME	Phone Time	Owner Protected	Telephone/Message Tim	0
SAME DAY SICK		Not Protected	Non-Preventive Encounte	0
SICK VISITS	Sick Visits	Not Protected	Any Encounter	0
TELEHEALTH SICK		Not Protected	Telehealth Encounter	1
TH WELL VISITS	Teal	Not Protected	TH Preventive Encounter	1
VACATION	Green	Owner Protected	Do Not Book	0

Enable

Activate the new calendar

- Navigate to Admin > Global Preferences > Schedule.
- Under Calendar Component, select the Devex (new) radio button.



System Preferences: Affects all users on the network.

Basic Colors & Font Schedule Special Clinic Info. Billing Maintenance Security Portal Demographics Exit

Elements to include in appointment text:

Patient last name and first name only

Patient last and first name, plus any of the following:

Home phone number

Date of birth

Allow use of time stamp on scheduled appointments

Do not use multiple calendars (tabs) on [F7 Schedule] form.

Organize "Appointment Type" drop down by department

Automatically reset visit stage when encounter notes are opened

Consolidate appointment reminders for siblings on the same day

Disable Curbside in Add/Edit Appt. screen

Disable No Show appointment status from auto creating a miscellaneous note

Automatically set visit stage to "Waiting Room" on new appointments starting within this many minutes of the current time (0 = disable auto-checkin):

Set the interval (in seconds) for refreshing the schedule tracking screen
Note: Shorter intervals may result in decreased overall system performance.

Calendar component:

DBI Tech (old) Devex (new)

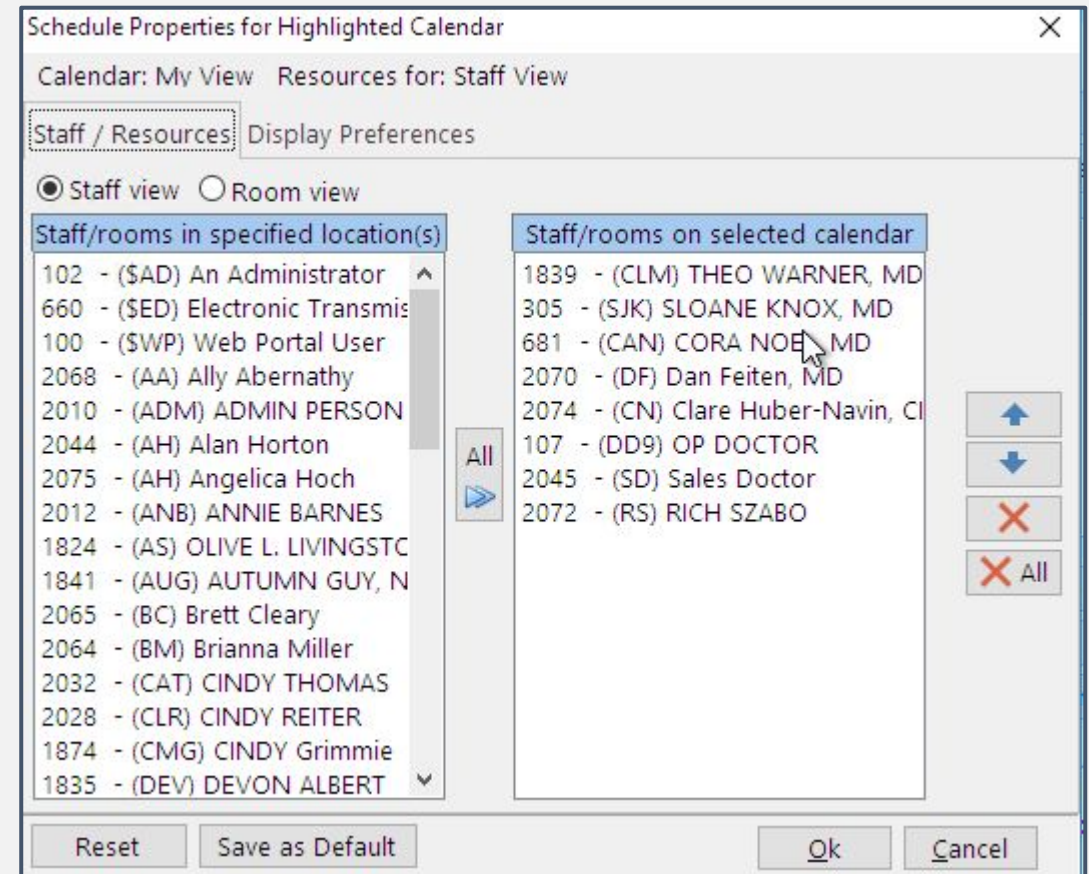
Display Preferences

Update display Preferences

You will need to reconfigure your display preferences for each location combination when using multi-location mode.

Example: If you are a three (3) location practice then you will need to configure seven (4) new views to optimize your use of this feature, including:

- Location 1&2
- Location 1&3
- Location 2&3
- Location 1, 2 & 3



Schedule Properties for Highlighted Calendar

Calendar: My View Resources for: Staff View

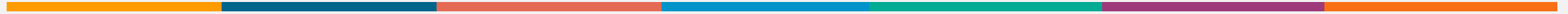
Staff / Resources: Display Preferences

Staff view Room view

Staff/rooms in specified location(s)	Staff/rooms on selected calendar
102 - (\$AD) An Administrator	1839 - (CLM) THEO WARNER, MD
660 - (\$ED) Electronic Transmis	305 - (SJK) SLOANE KNOX, MD
100 - (\$WP) Web Portal User	681 - (CAN) CORA NOE, MD
2068 - (AA) Ally Abernathy	2070 - (DF) Dan Feiten, MD
2010 - (ADM) ADMIN PERSON	2074 - (CN) Clare Huber-Navin, CI
2044 - (AH) Alan Horton	107 - (DD9) OP DOCTOR
2075 - (AH) Angelica Hoch	2045 - (SD) Sales Doctor
2012 - (ANB) ANNIE BARNES	2072 - (RS) RICH SZABO
1824 - (AS) OLIVE L. LIVINGSTON	
1841 - (AUG) AUTUMN GUY, N	
2065 - (BC) Brett Cleary	
2064 - (BM) Brianna Miller	
2032 - (CAT) CINDY THOMAS	
2028 - (CLR) CINDY REITER	
1874 - (CMG) CINDY Grimmie	
1835 - (DEV) DEVON ALBERT	

Reset Save as Default Ok Cancel

Calendar View Schedule Tabs





Let's Take a 🙄🙄

Setup Checklist



- Appointment Zones
 - Complete Appointment Zone Cleanup
- Enable new calendar
- Update Display Preferences
- Update Schedule Settings

OP 21.3 - New Calendar Overview

The content listed here is transitional documentation and is subject to change. About The Schedule Calendar is being refreshed! While we haven't gotten all the bugs worked out yet (see Known Issues , below), we wanted to offer it early so...

OP 21.3 - New Calendar Setup

The content listed here is transitional documentation and is subject to change. Thank you for choosing to enable the New Calendar View! We value this opportunity and accept any feedback your practice has to ensure the delivery of user-friendly ...

OP 21.3 - Creating a Schedule Using Slots For Multi-Location

Version 21.3 The content listed here is transitional documentation and is subject to change. Thank you for choosing to enable the New Calendar View! We value this opportunity and accept any feedback your practice has to ensure the delivery o...

OP 21.3 - New Calendar Overview - Quick Tip Video

This OP Quick Tip video shows you an overview of the OP 21.3 New Calendar.

OP 21.3 - New Calendar Setup - Quick Tip Video

This OP Quick Tip video shows you the basics of the OP 21.3 New Calendar Setup.

OP 21.3 - Appointment Types, Zones, Templates, and Slots - Quick Tip Video

This OP Quick Tip video shows you an overview of Appointment Types, Zones, Templates, and Slots.

OP 21.3 - Appointment Zones and Their Functions - Quick Tip Video

This OP Quick Tip video demonstrates how to customize appointment zones on the calendar view in Office Practicum.



Q&A

Objectives

By the end of today's event, you will be able to:

- Enable the new calendar setting in global preferences
- Complete setup for enhanced calendar functionality
- Identify whether there are multiple appointment zones applied

