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ACCESSING THE NEW CALENDAR

Enter the New Calendar by clicking the Calendar drawer in the Chart Room.

Alternately, you can access the New Calendar by clicking the Calendar button from a patient’s Chart Face (and other areas within the program).

The screenshot below shows what you will see upon entering the New Calendar (this shows the schedule view).

After you have set up the clinicians in your practice, he/she will have his/her own column on the calendar, and you can use the filters (see below) to control your view.

CONFIGURING THE NEW CALENDAR

Settings and options can be found from the Calendar and from Settings + Directories.

FROM THE CALENDAR

Within the Calendar, use the Settings option icon in the top left.
- only Group Administrators have access to this button. Select Group Options allows you to set the following options for the entire group:

- time scale in min
- start day at
- end day at
- default apt length
- refresh interval
- prevent double scheduling
- warn before double scheduling
- prevent double scheduling over block outs
- prevent double booking
- warn before double booking
- prevent double booking of Medicare patient
- warn before double booking a Medicare patient
- only group admin may add/edit/delete block outs
- show type color instead of status color
- show weekends
- hide cancelled appointments
- hide rescheduled appointments
- do not enter current patient in new event
- show count of events in column
- show scheduled clinicians only

Group Calendar Options
SELECT MY OPTIONS

- this option allows each user to set up a portion of the calendar to his/her specifications.

• time scale increments
• start day at
• end day at
• default appt length
• start on view
• refresh interval
• show weekends
• hide cancelled appointments
• hide rescheduled appointments
• do not enter current patient new event
• maximize calendar window

SET UP CLINICIANS

- Group Administrators can add a clinician to the calendar for scheduling.
Users are not automatically assigned to the Calendar. To add them, group administrators should follow these instructions:

1. From the Chart Room, click on the button to go to the Calendar.

2. On the Calendar, click the button.

3. Click the button.

4. Click the button.

5. In the popup window, fill in the required fields:
   A. Name displayed should reflect the name of the location (if multiple locations). In the screenshot, I added the first location to the name displayed. **Note: It is best NOT to add credentials because they can change and this may cause issues changing the name in the future.**
   B. Tie to this clinician field opens a window to select the provider.
   C. (Optional) Click the button to create the location as a group.
      a. In the popup window, type in the name of the location.
      b. Click the button to finish creation of the new group.
   D. Click the button to save the new "name" on the calendar.
6. Continue following steps 5 through 10 until all providers with locations are added to the calendar.

7. When done adding the providers, arrange the calendar so that the name of the providers line up (optional) by using the arrows by the name to move the clinician up or down.

After setting this up, the provider will be able to see their schedule from the Quick Calendar by clicking the **Quick Calendar** button.
If the provider does not want to see the block out times, click the [Hide Block Outs] box.

**SET UP APPOINTMENT TYPES**

- you can customize appointment types (categories) specific to your practice.

1. Click the [Add an Appointment] button to add an appointment type.
2. Add Appointment Type Name, Default Length, and Type Color.

3. Once done, click the button.

4. You can always edit an existing appointment type by clicking the icon next to the appointment type. Change any settings and click the button. Delete an appointment type by clicking the button.

**OPEN LEGACY CALENDAR (FROM CALENDAR)**

- new option that will open the Legacy Calendar with all data (appointments, settings, and options) intact. The Legacy Calendar will remain until you go out of the Calendar; upon return, the New Calendar will open.

**FROM SETTINGS + DIRECTORIES**

Group and Individual options are also available in Settings + Directories.

Individuals:
- The options can be selected from the Calendar Options tab. Group Settings are read only.

- Users can also choose if they want to use the Legacy Calendar from here by clicking the button. If selected from here, the Legacy Calendar will open every time the calendar is opened until you log off.

- You can also go back to using the New Calendar by clicking the button.
Group Administrators:

- Select Settings that Individual Users can Override. While these settings can be overwritten by individual users, it is beneficial to have settings set up for them when they first go to the Calendar. (These settings are on the left.)

- Group Level Only Settings are set for the entire group.
ICONS/VIEWS

- Settings and Options icon
- Show All Day icon
- Coloring by Appointment Type (click to swap colors between Status and Type) icon
- Column count toggle icon
- Show all clinicians icon

**Group Filter:** display events for clinicians in a group and hide all others

**Clinician Filter:** display events for the selected clinician and hide all others

Schedule view (with group Clinic chosen):
Day view – clinician needs to be selected for this view to work

Week view - clinician needs to be selected
Month view – clinician needs to be selected

Grid view
SCHEDULING AN APPOINTMENT

There are two ways to schedule an appointment in ICANotes. The first is to double click your cursor or an open time in the calendar.

This will open an Event Details window. If you choose the double-click cursor method, the appointment date and time and clinician’s name will autopopulate. Because I also have a default appointment type selected under group options, the appointment type is also autopopulated. You can change any of these entries by editing in the Event Details window. The appointment book will autopopulate the patient’s name if a patient is selected in the upper-left corner of the main calendar.

If a patient does not show up in the Event Details:
1. Click within the Patient field
2. Type the name of the patient
3. Select the patient.
If you are scheduling a follow-up appointment for a patient, you can print out a reminder for him/her by clicking the button and then button.

You can also choose to reschedule a recurring appointment using the button.

After all information for the appointment appears correctly on the Event Details window, you should click on the button to push the appointment to the actual calendar.

The second way to schedule an appointment is using the Find Openings feature. Clicking the button enables you to search for open appointment slots.

Using the Find Openings feature, you can search for an appointment slot based on appointment length, specific clinician, day(s) of the week, or a range of dates. After you enter your desired criteria in the search window, the program will generate a list of open slots on the right. If you click the checkbox labeled ‘show Appt slots for this Length’, all available individual appointment slots will be displayed in the circled column. To schedule an appointment, simply click on the desired appointment slot on the right, and an Event Details window will open.

**GROUP APPOINTMENTS**

1. From the New Calendar, click the button.
2. From the Event Details - Add window, I'm going to fill in the Patient, Date, Time, Type, Clinician, and Location of the appointment. Once done with the fields, click the More button in the bottom right.

3. Click Add People from the menu.
4. The Event Details - Add window expands to allow you to invite more Patients and/or Clinicians. Click the + sign to add another patient (or clinician).

5. Select another patient from the Find Patient window.

6. The new patient will show. Continue with steps 4 and 5 until all patients are selected.
Note: You can also use the **Add From Roster** button to add patients if you have set up Group Rosters.
7. You can add Clinicians to the appointment the same way. Click the + by Select a Clinician.

8. Choose the clinician from Choose Clinician window.

9. The Clinician will be added to the appointment.

10. Once all is set, click the button.
11. The appointment will book under all Clinicians selected in the appointment.

12. When the Status is changed on the appointment, it will be reflected for all Clinicians. I can go into the appointment to add or remove patients (or clinicians) from the appointment.

- I can see how many patients are scheduled for the appointment by the number in parentheses.
- I'm also able to see what patients are scheduled, where, and the event note.

**DRAGGING AND DROPPING APPOINTMENTS**

Dragging and dropping appointments allows you to move a patient from one time to another by dragging the appointment. This can be used in any of the views.

You need to grasp the appointment from the top (anywhere along the top by the time) and drag the appointment to the new time, day, or clinician. The appointment goes into the new slot seamlessly, updating all the information automatically.
From the month view, grasp the appointment anywhere to move.

Not only can you drag the entire appointment to a new time, date, or clinician, but you can decrease/increase the time of the appointments. Hover near the bottom of the appointment until ‼ shows. Then drag the time up or down. Once released, the appointment will update to the correct length.

PRINTING AN APPOINTMENT LIST

To print out a list of appointments for a specific date, click on the desired date on the calendar.

Next, press the Print button located on the right.

The Event Print Options window will populate, allowing you to select the appointment types you want included on your printed list as well as how you want patient information to print.
If you pick FULL patient info, your printed list will include appointment information and basic patient demographics including:

- name
- chart ID
- DOB
- contact phone numbers
- number preferred by patient
- insurance information
- any calendar note that has been set up for this patient
- number of patients being seen by the clinician for this day

If you choose LESS information, insurance information and notes will not be printed. Here you’ll also be able to include patient diagnosis on each event that’s printed or print a certain number of copies for each clinician assigned to an event.

Select **Print** to continue.

**EXPORTING AN APPOINTMENT LIST**

1. Click on the **Export** button.
2. Enter the date range for the appointments you want to include in the file. If you want tomorrow's appointments called tonight, you would enter the start and end date as tomorrow's date.

3. Check the Scheduled box if you want all scheduled appointments to be called.

4. Check the providers whose appointments you want to include in the file.
5. Press the Export button in the lower right of the pop-up box.

6. You will see a message telling you that you can download the file from the Upload Site.

7. On the Upload Site, download the file as a CSV file.

8. Your file is now ready.