

# Calendar

A scheduling calendar is used to manage and coordinate appointments, visits, and care plans for patients in their homes. A scheduling calendar typically displays dates in a monthly or weekly grid format, with each day divided into time slots. This makes it easy to view and plan activities over a specific time frame.

## Scheduling Tab >> Calendar

The user can view the schedules of all the patients in this calendar.

The screenshot displays a scheduling interface with the following components:

- Search and Filter Section:** Includes fields for Name, All Skills, All Patients (checked), 10/08/2023, and Service Type. There are also search buttons and a refresh icon.
- Employee List:** A table with columns: Employee, Used Hrs, Alloc. Hrs, and Remain. Hrs. It lists employees like Admin, Master; Catts, Tanya; D, David; Garcia, Maria; Garcia, William; Johnson, James; Lubel, Moshe; Smith, James; Smith, Robert; Toth, Alex; and waris, irtaza.
- Legend:** A row of color-coded boxes with labels: Confirmed (green), Not Scheduled (red), Is Denied (cyan), Completed (grey), On hold (blue), Approval Required (yellow), and Virtual Visits (orange). A Print PDF button is also present.
- Calendar View:** Shows a weekly grid for OCT 8 - 14, 2023. The grid has columns for days (Su 8, Mo 9, Tu 10, We 11, Th 12, Fr 13, Sa 14) and rows for patients. Patient schedules are shown as colored blocks with time ranges. For example, Clark, Samuel has a 67% bulk schedule from 7:00-14:00 on Su 8, Mo 9, and Tu 10. Hernandez, Brown has a 0% bulk schedule from 8:00-22:00 on Mo 9, Tu 10, and We 11.

The color in the calendar represents whether the schedules has been completed, confirmed, not scheduled, etc., as per the color indicator above the calendar on the screen.

## Change Schedule

For changing the schedules for any particular day, the user can click on the schedule time, the following screen appears, Click Change Schedule option.

All Patients    10/29/2023    Service Type    Search    Print PDF

Confirmed   Not Scheduled   Is Denied   Completed   On hold   Approval Required   Virtual Visits

Day   Week   Month    OCT 29 – NOV 4, 2023    Refresh   Today   < >

Patients	Hrs	Su 29	Mo 30	Tu 31	We 1	Th 2	Fr 3	Sa 4
<input checked="" type="checkbox"/> Clark, Samuel Bulk Schedule 89%	56/63	7:00 - 14:00 Garcia, Willi...	7:00 - 14:00 Garcia, William					
						15:00 - 22:00 +	15:00 - 22:00 Garcia, Willi...	

**GARCIA, WILLIAM** (William1122) Confirmed

✉: William@gmail.com    ☎: (789) 787-8778

**Start Time :** 7:00 AM      **Clock In Time :**  
**End Time :** 2:00 PM      **Clock Out Time :**  
**Service :** Respite Care      **Payor :** Atena  
**Comment :**

📅 Change Schedule  
 📝 Note  
 ⚙ Edit  
 🗑 Delete

Now, change the Employee name and the scheduled time if required and click Save option.

## Change Schedule

### Select Employee

James Smith ▼

### Schedule Start Time

07:00 am

### Schedule End Time

02:00 pm

Cancel
Save

The selected Employee is now scheduled with the patient for the particular day and notification will be sent to the Employee.

All Patients    10/29/2023    Service Type    Search Patient...    Partially Scheduled Patients    Search    Print PDF

Confirmed   Not Scheduled   Is Denied   Completed   On hold   Approval Required   Virtual Visits

Day   Week   Month    OCT 29 - NOV 4, 2023    Refresh   Today   <   >

Patients	Hrs	Su 29	Mo 30	Tu 31	We 1	Th 2	Fr 3	Sa 4
<input checked="" type="checkbox"/> Clark, Samuel Bulk Schedule    89%	56/63	7:00 - 14:00 Smith, James	7:00 - 14:00 Garcia, Willi...	7:00 - 14:00 Garcia, William				
						15:00 - 22:00 +	15:00 - 22:00 Garcia, Willi...	
<input checked="" type="checkbox"/> Hernandez, Brown Bulk Schedule    0%	0/42		8:00 - 22:00 +	8:00 - 22:00 +	8:00 - 22:00 +			

# Patient Denied Service

**Scheduling Tab >> Calendar**

The patient denied service can be updated in the Scheduling calendar by simply clicking on the schedules of the day. The following screen appears, click Note option.

All Patients    10/29/2023    Service Type    clark    All Patients    Search    Print PDF

Confirmed   Not Scheduled   Is Denied   Completed   On hold   Approval Required   Virtual Visits

Day   Week   Month    OCT 29 - NOV 4, 2023    Refresh   Today   <   >

Patients	Hrs	Su 29	Mo 30	Tu 31	We 1	Th 2	Fr 3	Sa 4
<input checked="" type="checkbox"/> Clark, Samuel Bulk Schedule    89%	56/63	7:00 - 14:00 Smith, James	7:00 - 14:00 Garcia, Willi...	7:00 - 14:00 Garcia, William				
						15:00 - 22:00 +	15:00 - 22:00 Garcia, Willi...	

**GARCIA, WILLIAM** (William1122) Confirmed

✉: William@gmail.com    ☎: (789) 787-8778

**Start Time :** 7:00 AM    **Clock In Time :**  
**End Time :** 2:00 PM    **Clock Out Time :**  
**Service :** Respite Care    **Payor :** Atena  
**Comment :**

Change Schedule   
 Note   
 Edit   
 Delete

Now, click on the check box and update the Note for the denied service and click save option.

Note

Patient Denied Service?

Note\*

Vacation

Cancel
Save

The patient denied service details has been updated in the Scheduling calendar and we can view the details as Do not Schedule on the particular day.

All Patients    10/29/2023    Service Type

clark    All Patients    Search

Confirmed   Not Scheduled   Is Denied   Completed   On hold   Approval Required   Virtual Visits    Print PDF

Day Week Month    OCT 29 - NOV 4, 2023    Refresh Today < >

Patients	Hrs	Su 29	Mo 30	Tu 31	We 1	Th 2	Fr 3	Sa 4
<input checked="" type="checkbox"/> Clark, Samuel <a href="#">Bulk Schedule</a> 78%	49/63	7:00 - 14:00 Smith, James	7:00 - 14:00 Do Not Sch...	7:00 - 14:00 Garcia, Willi...	7:00 - 14:00 Garcia, William			
						15:00 - 22:00 +	15:00 - 22:00 Garcia, Willi...	

# Delete Schedule

Scheduling Tab >> Calendar

The Schedules for a particular day can be deleted in the system. Click on the schedule, the following screen appears, click Delete option.

All Patients    10/29/2023    Service Type

Search Patient...    Partially Scheduled Patients    Search

Confirmed   Not Scheduled   Is Denied   Completed   On hold   Approval Required   Virtual Visits    Print PDF

Day Week Month    Refresh Today < >

Patients	Hrs	Th 2	Fr 3	Sa 4
<input checked="" type="checkbox"/> Clark, Samuel <a href="#">Bulk Schedule</a> 67%	42/6	7:00 - 14:00 Garcia, Willi...	7:00 - 14:00 Garcia, Willi...	7:00 - 14:00 +
<input checked="" type="checkbox"/> Hernandez, Brown <a href="#">Bulk Schedule</a> 0%	0/42	15:00 - 22:00 +	15:00 - 22:00 +	
<input checked="" type="checkbox"/> T, Rahul <a href="#">Bulk Schedule</a> 0%	0/49	7:00 - 14:00 +	7:00 - 14:00 +	7:00 - 14:00 +

**GARCIA, WILLIAM** (William1122) Confirmed

✉: William@gmail.com    ☎: (789) 787-8778

**Start Time :** 7:00 AM    **Clock In Time :**  
**End Time :** 2:00 PM    **Clock Out Time :**  
**Service :** Respite Care    **Payor :** Atena  
**Comment :**

Change Schedule  
 Note  
 Edit  
 Delete

The schedule with the employee gets deleted from the Timeslot and we can reassign the schedules to different employee in the system.

**All Patients**
11/05/2023
Service Type

Partially Scheduled Patients
**Search**

■ Confirmed
 ■ Not Scheduled
 ■ Is Denied
 ■ Completed
 ■ On hold
 ■ Approval Required
 ■ Virtual Visits
 **Print PDF**

Day Week Month
**NOV 5 - 11, 2023**
Refresh
Today
<
>

Patients	Hrs	Su 5	Mo 6	Tu 7	We 8	Th 9	Fr 10	Sa 11
<input checked="" type="checkbox"/> Hernandez, Brown <span style="color: blue;">Bulk Schedule</span> 0%	0/42		8:00 - 22:00 +	8:00 - 22:00 +	8:00 - 22:00 +			

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