Calendar Module

September, 2023

# Overview

The calendar module provides a dynamic platform for overseeing events like appointments and virtual visits for your clients and internal tasks and scheduling for people within your organization. Customize your view by day, week, or month, and seamlessly integrate other employee or client event calendars into your own for comprehensive management.

## Placeholder image

## Event scheduling and reminders

Schedule events for your clients so they receive notifications for upcoming appointments or activities which ensures they don't miss important events.

Collaborative sharing

With a feature to view the calendars of other admins and clients, the calendar module helps you efficiently view your coworkers’ schedules, tasks and your clients’ appointments.

# How To

1. [View employee schedules](#mb3s9koh6zpu)
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**View employee schedule/calendar:**

The calendar module facilitates collaboration by allowing co-workers to view each other’s calendars. To view employee schedules simply use the search bar on the bottom left to search by admin name or email or choose from the dropdown menu.

You can view multiple calendars at once or use the **x** to deselect.

**Update employee task/schedule:**

Facilitating transparent and efficient communication within the organization is made seamless through the capability to access employee schedules and tasks.

* Goto +Add an Event button in the top right corner
  + Choose Schedule to incorporate administrative schedules, promoting awareness of each team member's availability.
  + Choose Task to include an internal task description, along with the specified date and time.

**Schedule an appointment for your client:**

Our calendar enables you to easily add appointments, ensuring that your commitments are organized and accessible at a glance to you and all appointment participants. To schedule an appointment:

* Goto +Add an Event button in the top right corner > Choose Appointment
* The prompt allows you to add an appointment description, date, time, and any additional admins as required to set up an appointment for the patient of your choice.
* This will send reminders to all participants to the email on file.

You can schedule an appointment using the [appointments module](https://docs.google.com/document/u/0/d/1fiiS-P1MEJJ474BnyDL1SSgEQ6Qk6eDvUDBMvlYPHUA/edit) as well.

**Schedule a virtual visit with your client:**

Effortlessly integrate virtual visit appointments into your and clients’ calendars, ensuring streamlined management and easy accessibility of your telehealth services. To schedule a virtual visit:

* Goto +Add an Event button in the top right corner > Choose virtual visit.
* The prompt allows you to add an appointment description, date, time, and any additional admins as required to set up an appointment for the patient of your choice.
* This will send reminders to all participants to the email on file.

You can schedule a virtual visit using the [virtual visits module](https://docs.google.com/document/d/1Fqfuv33epOgWM5OiBhXbjdHtUZ04ChtKY5OChsq0ztE/edit) as well.

**Filter calendar view:**

If you would like to view particular appointments, use the search bar on the top left of the calendar to filter by client name or email.