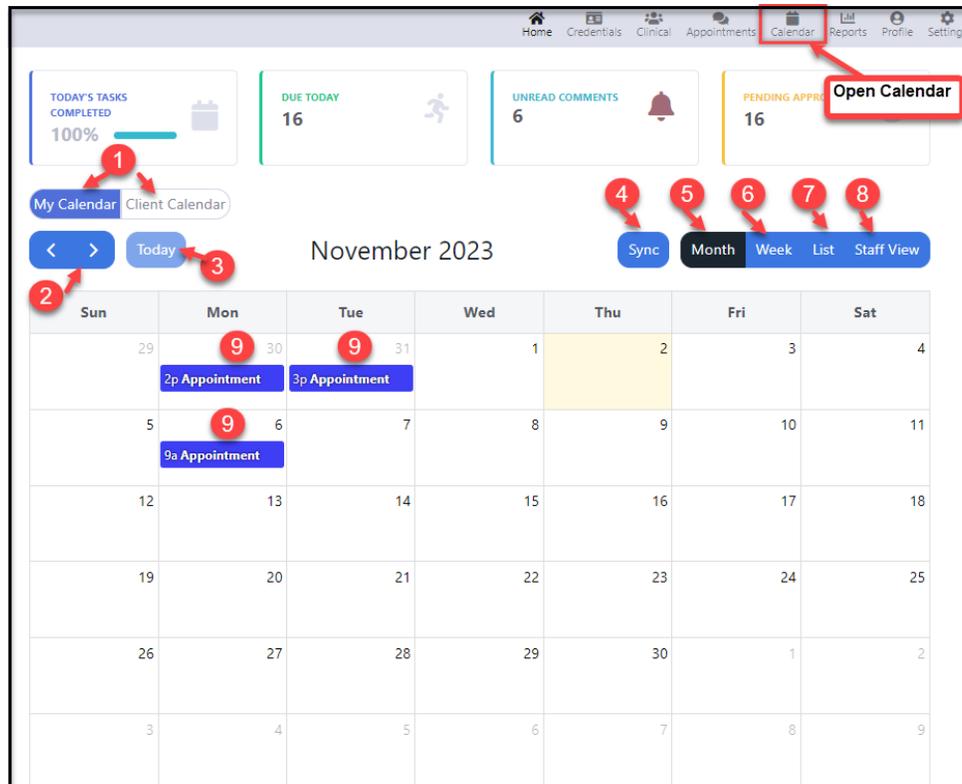


OakTree Practice Management: Navigating the Calendar

The OakTree Calendar enables you to create appointments for your clients and staff. In this guide, we show you how to navigate the calendar and show you the functions of the available buttons.

Navigating the OakTree Calendar

Located on the Menu click the {Calendar} Icon to view your calendar



Button Overview

1. **My Calendar/Client Calendar button** – You can toggle between your calendar which is the default view and your client's calendar view
2. **The Navigation button** – The arrows allow you to move forward or backward by a month, week, list, or staff view.
3. **Today button** – Use the button to return today's date
4. **Sync button** – Sync to Connect Outlook or Copy the Calendar link
5. **Month View** – Switches to month view
6. **Week View** – Switches to week view showing one week at a time
7. **List View** – Switches to list view showing any appointments for the chosen week
8. **Staff View** – View other staff calendars (With security access. See user setup below)
9. **Appointments** – Hover your mouse pointer to see a list of invitees or double-click to see details

Manage Users/User Setup

For a user to access calendars for all other users, they must have the “Access to All User Calendars” radio button set to “Yes”

Manage Users

First Name	Supervisor
<input type="text"/>	N/A
Middle Name	Email
<input type="text"/>	<input type="text"/>

Agency ID	Role
-Please Select-	-Please Select-

Credential Hours Require Approval

Yes

No

Access to All User Calendars

Yes

No

If Yes, hours entered by this user will require a Supervisor and/or Super Admin to approve

[My Calendar/Client Calendar] buttons

Use the [Client Calendar] button to pull up your client schedules

My Calendar **Client Calendar**

< > Today

- Able, Janet (DOB: 2015-10-21)
- Able, Janet (DOB: 2015-10-21)**
- Albert, Jack (DOB: 2013-02-12)

[Sync] button

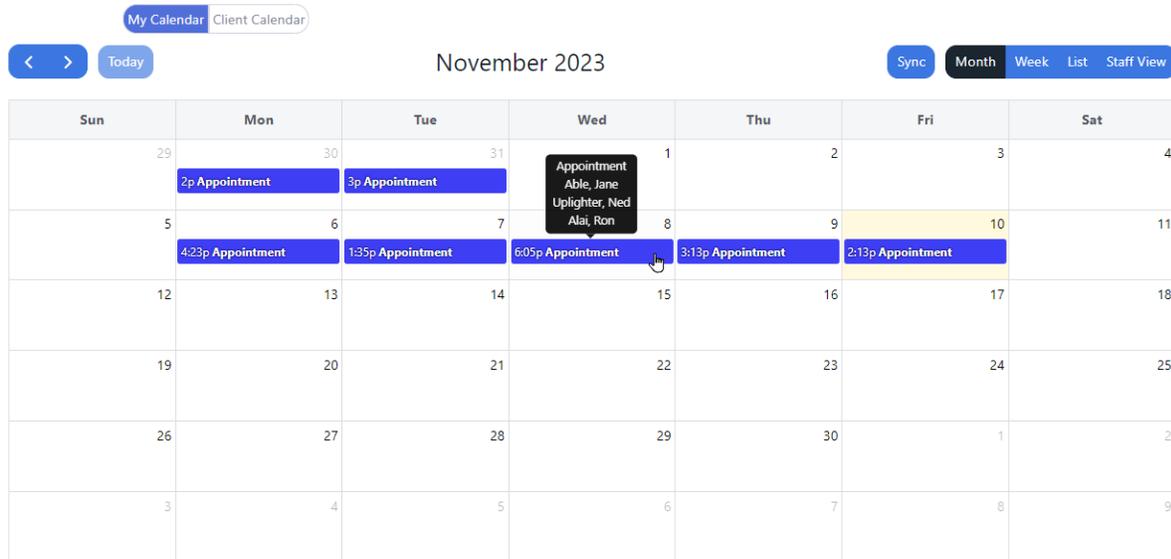
The Sync option provides a way to synchronize to your Outlook calendar. When you click the [Sync] button you will be instructed to either connect to Outlook or copy a calendar link.

Connect Outlook: By synchronizing your Outlook calendar, any  calendar events not marked Private will be visible to your organization.

Copy Calendar Link: Your calendar link can be used to subscribe to your OakTree calendar from an external calendar service.

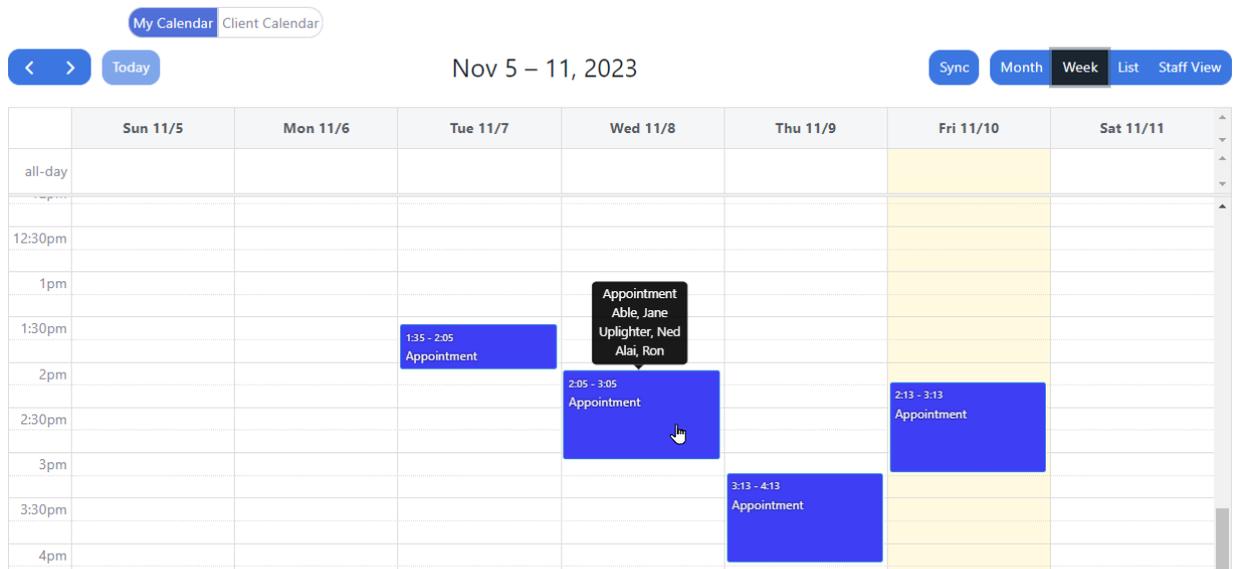
[Month] button

The monthly view will show your appointments which you can hover over to the list of invitees. To update the appointment just double-click the appointment.



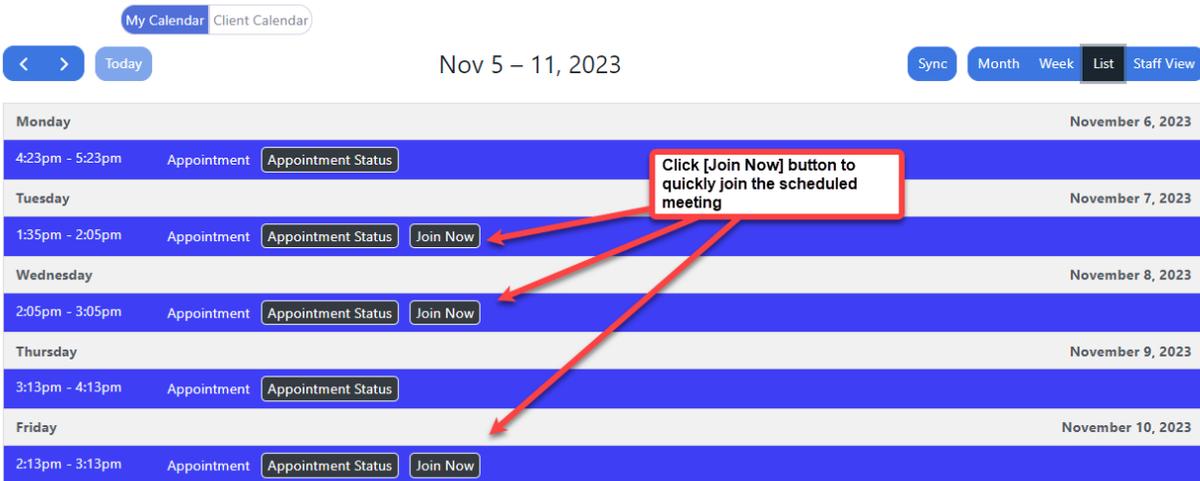
[Week] button

For a closer view of your appointments use the weekly view. You will also be able to double-click the appointment here to modify your appointments. For appointments that are linked to, you can view (but not edit)



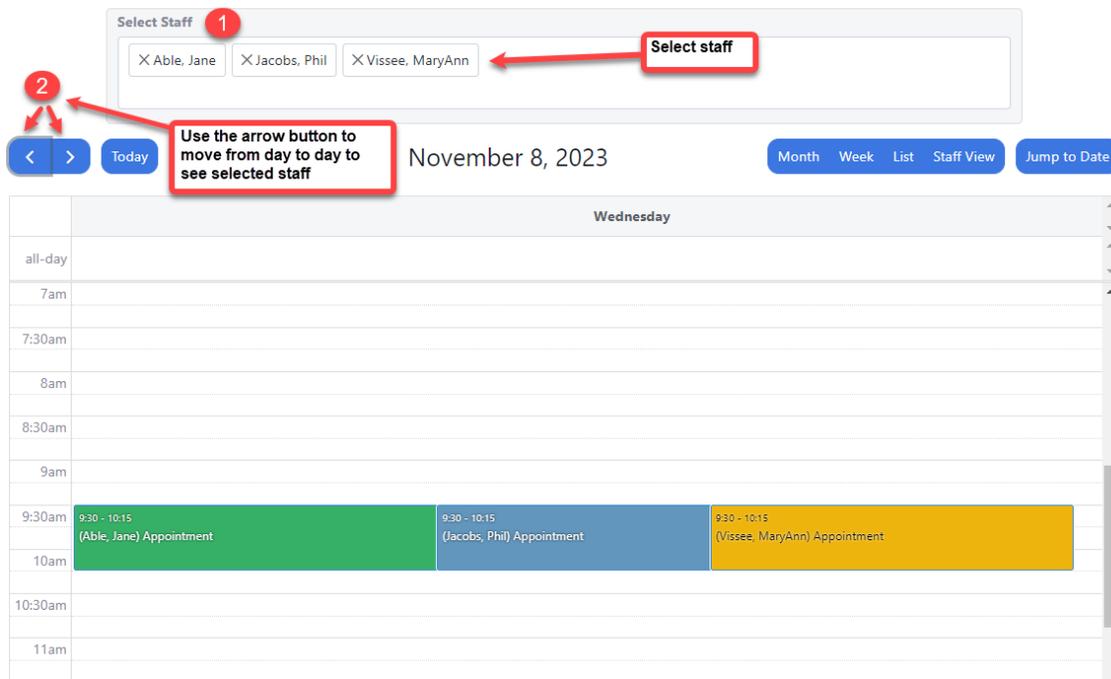
[List] button

The List provides a list by week of all your appointments both in-person and video conference. You will also see a [Join Now] button for appointments that are video conference meetings. Each [Join Now] button has a unique meeting ID.



[Staff View] button

The Staff View button is available for users who are granted access to all calendars. Users can select one or multiple users to view their appointments.



[Jump to Date] button

Users with access to the Staff View will also have access to the **[Jump to Date]** button. This feature allows users to move quickly to a specific date on the calendar.

The screenshot displays the OakTree Staff View interface. At the top, there is a 'Select Staff' section with three buttons: 'X Able, Jane', 'X Jacobs, Phil', and 'X Vissee, MaryAnn'. Below this, navigation buttons include '< >', 'Today', 'November 1, 2023', 'Month', 'Week', 'List', 'Staff View', and 'Jump to Date'. A red arrow points to the 'Jump to Date' button. The main calendar area shows a grid for Wednesday, November 1, 2023. A date picker overlay is visible, showing a calendar for November 2023 with the 1st highlighted in blue and the 2nd in yellow. The calendar grid shows appointments for 9:30 - 10:15: (Able, Jane) Appointment (green), (Jacobs, Phil) Appointment (blue), and (Vissee, MaryAnn) Appointment (yellow).

For more questions, user guides, and tutorials on OakTree, visit our 24-hour online [Help Center](#), call us at 800-324-7966 or email support@orionhealthcare.com