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

			Hon	ne Credentials Clinica	Appointments Calen	dar Reports Profile Settings
TODAY'S TASKS COMPLETED 100%		DUE TODAY 16		AD COMMENTS	PENDING A	PPRC Open Calendar
My Calendar Clier	t Calendar	Novembe	er 2023	4 Sync	5 6 Month Week	7 8 List Staff View
Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	9 30 2p Appointment	9 31 3p Appointment	1	2	3	4
5	9 6 9a Appointment	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2
3	4	5	6	7	8	9

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
	N/A +
Middle Name	Email
Agency ID	Role
-Please Select- \$	-Please Select-
Credential Hours Require Approval	Access to All User Calendars
O Yes	O Yes
No	No
If Yes, hours entered by this user will require a Supervisor and/or Super Admin to approve	
Add Cancel	

[My Calendar/Client Calendar] buttons

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

My Calendar Client Calendar	Able, Janet (DOB: 2015-10-21)	Ť
	Able, Janet (DOB: 2015-10-21)	
< > Today	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.



[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.

My Cale	ndar Client Calendar					
< > Today		Novem	ber 2023		Sync Month	Week List Staff View
Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30 2p Appointment	31 3p Appointment	Appointment Able, Jane Uplighter, Ned	2	3	4
5	6 4:23p Appointment	7 1:35p Appointment	Alai, Ron 8 6:05p Appointment	9 3:13p Appointment	10 2:13p Appointment	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2
3	4	5	6	7	8	9

[Week] button

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

	My Calendar C	lient Calendar					
$\langle \cdot \rangle$	Today		Nov 5 –	11, 2023		Sync Month	Week List Staff View
	Sun 11/5	Mon 11/6	Tue 11/7	Wed 11/8	Thu 11/9	Fri 11/10	Sat 11/11
all-day							▲ ▼
h							•
12:30pm							
1pm				Appointment			
1:30pm			1:35 - 2:05 Appointment	Able, Jane Uplighter, Ned Alai, Ron			
2pm				2:05 - 3:05 Appointment		2:13 - 3:13	
2:30pm						Appointment	
3pm					242 442		
3:30pm					Appointment		
4pm							

[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.

My Calendar Client Calend	rat		
< > Today	Nov 5 – 11, 2023		Sync Month Week List Staff View
Monday			November 6, 2023
4:23pm - 5:23pm Appointment App	vointment Status	Click [Join Now] button to	
Tuesday		quickly join the scheduled meeting	November 7, 2023
1:35pm - 2:05pm Appointment App	ointment Status Join Now		
Wednesday			November 8, 2023
2:05pm - 3:05pm Appointment App	vointment Status Join Now		
Thursday			November 9, 2023
3:13pm - 4:13pm Appointment App	pointment Status		
Friday			November 10, 2023
2:13pm - 3:13pm Appointment App	ointment Status Join Now		

[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.

	Select S	Staff 🚺	_		
2	×AI	ble, Jane X Jacobs, Phil X Vi	ssee, MaryAnn	elect staff	
	Today	Use the arrow button to move from day to day to see selected staff	November 8, 2023	Month Week List Staff View	Jump to Date
			Wednesda	ау	
all-day					A
7am					
7:30am					
8am					
8:30am					
9am					
9:30am	9:30 - 10:15 (Able, Jane) App	ointment	9:30 - 10:15 (Jacobs, Phil) Appointment	9:30 - 10:15 (Vissee, MaryAnn) Appointment	
10am					
10:30am					
11am					

[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.

lect Staff	•											
×Able, J	Jane X Jacobs, Phil X Viss	see, MaryAnn										
< >	Today No	vember 1, 20	23			Mor	nth	Week	List	Staff Vi	iew	Jump to D
			Wed	nesd	av							
										/		
all-day		_					_					
7am		٥	Nov	emb	er 202	23	•	0				
7:30am		S	u Mo	Tu	We	Th	Fr	Sa				
					1	2	3	4				
8am			5 6	7	8	9	10	11				
8:30am			2 13	14	15	16	17	18				
			9 20 6 27	21	22	30	24	25				
9am												
9:30am	9:30 - 10:15	9:30 - 10:15						9:30 - 10	:15			
10	(Able, Jane) Appointment	(Jacobs, Phil) A	ppointm	ent				(Vissee	MaryAr	nn) Appoint	tment	
ruam												
0:30am												
11am												

For more questions, user guides, and tutorials on OakTree, visit our 24-hour online <u>Help Center</u>, call us at 800-324-7966 or email <u>support@orionhealthcare.com</u>