




This Quick Reference Guide (QRG) reviews using the Patient Calendar in Netsmart.

Common Buttons & Icons

	Search icon
	Refresh icon
	Add button
	Stethoscope icon

Use the Patient Calendar

To use your patient's Calendar screen effectively, you should be able to open it, schedule visits, and modify visit information.

Navigate to Your Patient's Calendar Screen

➤ From anywhere in NetSmart:

STEP 1: Tap the Search icon.

STEP 2: Type your patient's last name, then first name into the Search field; then tap [Enter] on your keyboard.

NOTE: Ensure that you separate the names with a comma. Example: Smith, John.

STEP 3: Tap your patient's name in the Search Results list.

STEP 4: Tap the Refresh icon.

NOTE: This is a best practice.

STEP 5: Tap the Calendar tile in the left-hand column.

Add a Patient Visit

➤ From your patient's Calendar screen:

STEP 1: Tap the Add button at the bottom-right of the screen.

STEP 2: Fill in information as needed; then tap DONE at the bottom of the window.

NOTE: Consider the following while scheduling:

- a. The visit defaults to Nonrecurring; however, you can change it to Recurring at the top of the window if needed.
-

- b. The RESOURCE selection defaults to your current login. You can change this if needed by tapping the RESOURCE drop-down arrow; then searching for the appropriate resource.
- c. You can modify the details of a saved visit by tapping it on the schedule.
- d. Once you schedule a visit, you can move it to another day by dragging it across the schedule.

Patient Calendar Features

The following is a description of a few of your patient's Calendar features.

- **Stethoscope icon:** Allows you to instantly open your own calendar. This icon is located near the top-left of the screen.
- **VISIT FREQUENCY:** General visit frequency information is located in the bottom-left corner of the screen. If you tap the **SHOW DETAILS** link, a window containing additional visit frequency details will appear.
- **Toggle Week/Day View:** By default, the Schedule screen displays the patient's visits for the current week; however, you can change this to a detailed view of the current day by tapping **Day** at the bottom of the screen. For a full description of the Day view's features, refer to the Use Your Calendar quick reference guide.