PracticeEHR
Simplifying Healthcare

Practice EHR | User Guide
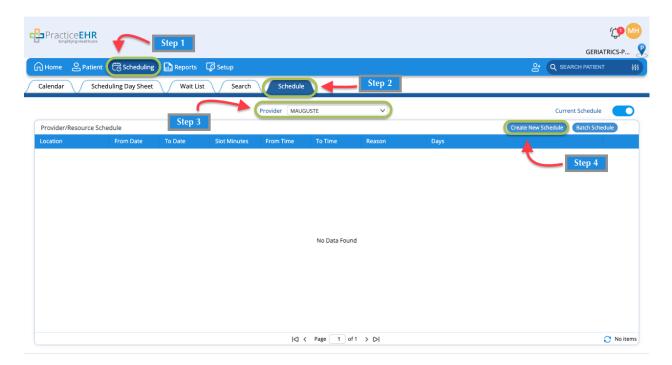
Scheduling Module | Part 1

Scheduling Module

The Scheduling module allows the user to create slots for a provider within the practice and book or schedule appointments for the patient against the available slots at a specific time on a particular day.

Here, we discuss how to create new slots for a provider and schedule new appointments for a patient.

1. Creating a New Schedule or Slot for a Provider/Resource

A schedule must be created for a specific provider or resource at a particular location before making an appointment for a patient within the system. The created schedule will allow the practice staff to book an appointment against the available slots.
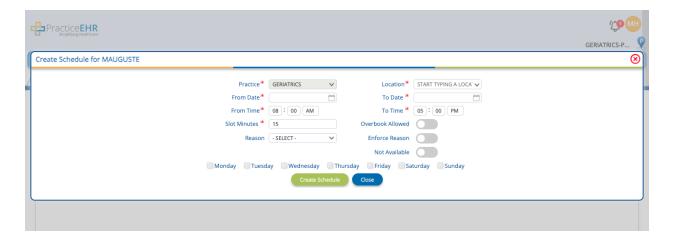
To create new slots or a schedule, follow these steps:

1. Go to "**Scheduling.**"

2. Navigate to the "**Schedule**" tab.

3. Select the provider or resource from the drop-down menu.

4. Click on "**Create New Schedule.**"

5. Select "**Location**" from the drop-down menu.

6. Then, select the date and time for which the user wants to create a schedule or slots.

7. Enter the required duration of each slot in the "**Slot Minutes**" box.

8. The user can also assign a reason to the slots from the "**Reason**" drop-down menu.

9. Check "**Overbook Allowed**" in case the user wants to schedule multiple appointments within a single slot.*****

10. To create a blocked slot, the user can select the date and time and then check "**Not Available.**"

11. To create a schedule or slot for a specific time and day of a week for an entire month or year, the user should:

   - Enter the "**From Date**" and "**To Date.**"
   - Enter the "**From Time**" and "**To Time.**"
   - Enter slot minutes.
   - Then, select the day(s) of the week for which the schedule or slots are to be created.

12. Select "**Show on Portal**" if the user intends to allow patients to view the available slots for the selected provider or resource.
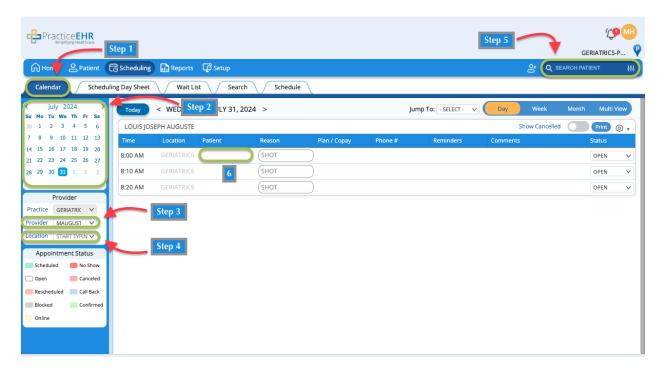
13. Click "**Create Schedule**."

The "Overbook Allowed" option will ensure that appointments for more than one patient can be scheduled in a single time slot. For example, if a 30-minute slot is allowed to overbook and the first patient only requires a 15-minute visit, the user can create an appointment with another patient for the remaining 15 minutes.
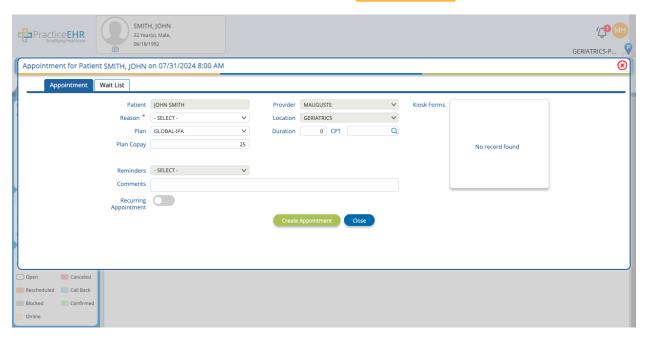
2. Booking an Appointment for a Patient

The user can book appointments for patients against the created slots or schedules. To book an appointment against a slot or schedule:

1. Go to the "**Calendar**" tab.
2. Select the required date from the calendar.
3. Select the provider/resource from the "**Provider**" drop-down menu.
4. Select the location from the "**Location**" drop-down menu.
5. Search for the patient using the "**Search**" option in the top left corner.
6. Select the required patient.

7. Enter the appointment details.

8. Click "**Create Appointment**."

The user can create an overbooked appointment for the same slot by switching the patient through the "**Search**" option and then scheduling the appointment against the already booked slot in the same manner. The system allows for a maximum of four appointments for a single slot.