

# 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:

The screenshot shows the PracticeEHR Scheduling Module interface. The steps are as follows:

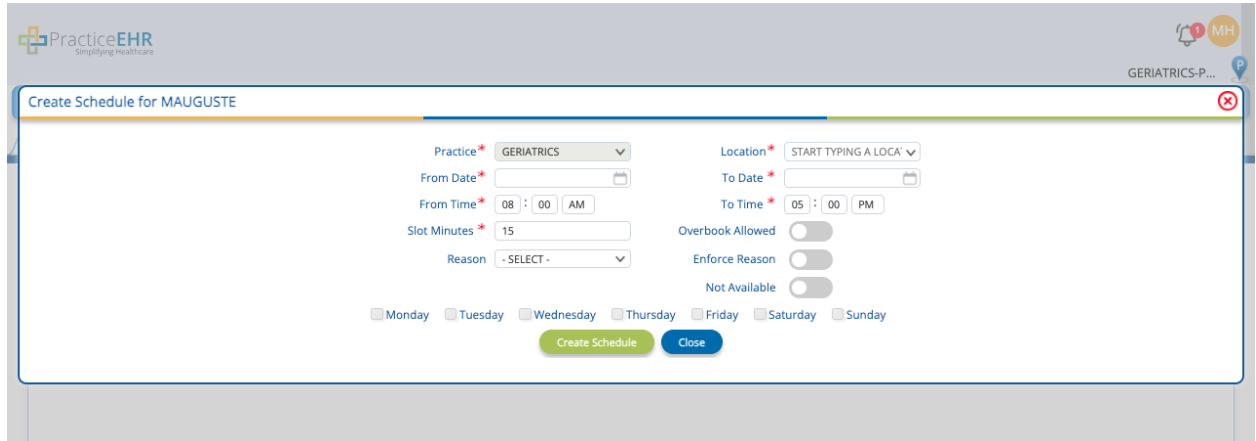
- Step 1:** Click on the **Scheduling** menu item in the top navigation bar.
- Step 2:** Click on the **Schedule** button in the sub-navigation bar.
- Step 3:** Click on the **Create New Schedule** button in the **Provider/Resource Schedule** section.
- Step 4:** Click on the **Create New Schedule** button in the top right corner of the main content area.

The main content area displays a table with the following columns: Location, From Date, To Date, Slot Minutes, From Time, To Time, Reason, and Days. The table is currently empty, showing "No Data Found".

Location	From Date	To Date	Slot Minutes	From Time	To Time	Reason	Days
No Data Found							



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:

The screenshot shows the PracticeEHR scheduling interface. On the left, there is a calendar for July 2024. The date 31 is highlighted. Below the calendar are dropdown menus for 'Provider' (MAUGUST) and 'Location' (START TYPIN). On the right, there is a table of appointments for LOUIS JOSEPH AUGUSTE. The table has columns for Time, Location, Patient, Reason, Plan / Copay, Phone #, Reminders, Comments, and Status. Three appointments are listed for 8:00 AM, 8:10 AM, and 8:20 AM, all at GERIATRICS, with the Reason 'SHOT' and Status 'OPEN'. The patient name '6' is visible in the Patient column for the 8:10 AM slot. In the top right corner, there is a 'SEARCH PATIENT' button. Five numbered steps are overlaid on the interface: Step 1 points to the 'Calendar' tab, Step 2 points to the date 31, Step 3 points to the 'Provider' dropdown, Step 4 points to the 'Location' dropdown, and Step 5 points to the 'SEARCH PATIENT' button.

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.



PracticeEHR Simplifying Healthcare

SMITH, JOHN  
52 Year(s), Male,  
06/18/1992

GERIATRICS-P...

Appointment for Patient SMITH, JOHN on 07/31/2024 8:00 AM

Appointment | Wait List

Patient: JOHN SMITH | Provider: MAUGUSTE | Kiosk Forms: No record found

Reason: -SELECT- | Location: GERIATRICS

Plan: GLOBAL-IPA | Duration: 0 CPT

Plan Copay: 25

Reminders: -SELECT-

Comments: [Text Field]

Recurring Appointment:

Create Appointment | Close

Open     Canceled  
 Rescheduled     Call Back  
 Blocked     Confirmed  
 Online

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.