

Practice EHR | User Guide

Scheduling Module | Part 2



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. Calendar

The Calendar tab offers access to the created slots or scheduled appointments for a specific day.

The screenshot displays the PracticeEHR Scheduling Module interface. At the top, the PracticeEHR logo and patient information for 'SMITH, JOHN' are visible. The navigation bar includes 'Home', 'Patient', 'Scheduling', 'Reports', and 'Setup'. The 'Scheduling' tab is active, and the 'Calendar' sub-tab is selected. The main content area shows a 'Provider's Daily Schedule' for 'LOUIS JOSEPH AUGUSTE' on 'WEDNESDAY, JULY 31, 2024'. The schedule table lists three slots at 8:00 AM, 8:10 AM, and 8:20 AM, all with a status of 'OPEN'. A callout box labeled '5' points to the schedule table with the text 'Provider's Daily Schedule'. On the left, a calendar widget shows the date '31' selected, and a provider selection dropdown is set to 'MAUGUST'.

Time	Location	Patient	Reason	Plan / Copay	Phone #	Reminders	Comments	Status
8:00 AM	GERIATRICS		SHOT					OPEN
8:10 AM	GERIATRICS		SHOT					OPEN
8:20 AM	GERIATRICS		SHOT					OPEN

1.1. The Calendar

The calendar shown on the left side of the screen can be used to navigate to a specific date. Any slot created or appointment scheduled will appear in the **“Provider Daily Schedule”** section once the date, provider, and location are selected.



1.2. Date Navigation Options

- The user can move forward or back in date using the arrows.
- To return back to today's date, click on **"Today."**
- The user can use the **"Jump To"** drop-down menu to jump by certain days, weeks, or months, which can be preset through the Setup module.
- The user can also opt for a daily, weekly, monthly, or multiview through this section.

1.3. Select Provider and Location

The user can select the provider and the location using this section.

1.4. Status Colors

The slots have different colors based on their availability status, as elaborated in this section.

- The **black color** implies that the slot has been blocked by the user or provider for some reason.
- The **green color** means that the slot has already been scheduled.
- A **light pink color** demonstrates that the slot has been canceled.
- An **unshaded slot** implies that the slot is open and appointments can be made.

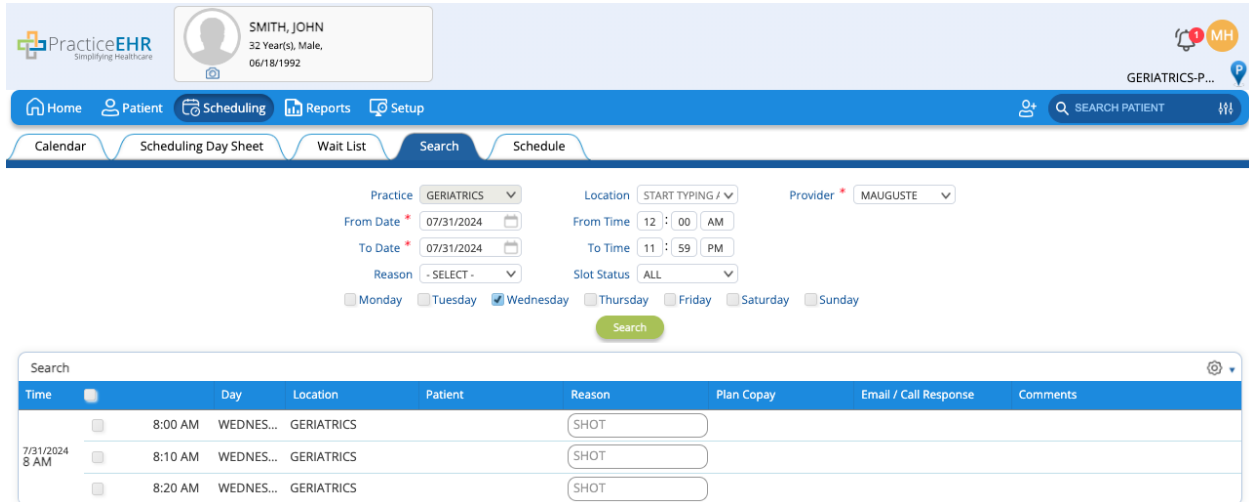
1.5. Provider Daily Schedule

This section enlists the scheduled appointment against the selected date and the provider. The colored slots imply a booked, canceled, blocked, or open status based on the color, as explained above.



2. Search

The Search tab is quite useful when the practice needs to reschedule multiple patients, block specific time slots for certain days of the office, or when a particular provider is unavailable.



Practice: GERIATRICS | Location: START TYPING / v | Provider: MAUGUSTE

From Date: 07/31/2024 | To Date: 07/31/2024

From Time: 12:00 AM | To Time: 11:59 PM

Reason: -SELECT- | Slot Status: ALL

Monday Tuesday Wednesday Thursday Friday Saturday Sunday

Search

Time	Day	Location	Patient	Reason	Plan Copay	Email / Call Response	Comments
7/31/2024 8 AM	8:00 AM	WEDNES...	GERIATRICS	SHOT			
	8:10 AM	WEDNES...	GERIATRICS	SHOT			
	8:20 AM	WEDNES...	GERIATRICS	SHOT			

The user can use search filters to access specific slots for the required action. Once searched, the slots will appear as a list at the bottom of the screen. The user can select the required slots and use the gear icon to:

- **Change the location or provider** for an appointment
- **Delete** the selected slots
- **Block** the selected slots
- **Unblock** the selected slots