Practice EHR | User Guide

Scheduling Module | Part 3

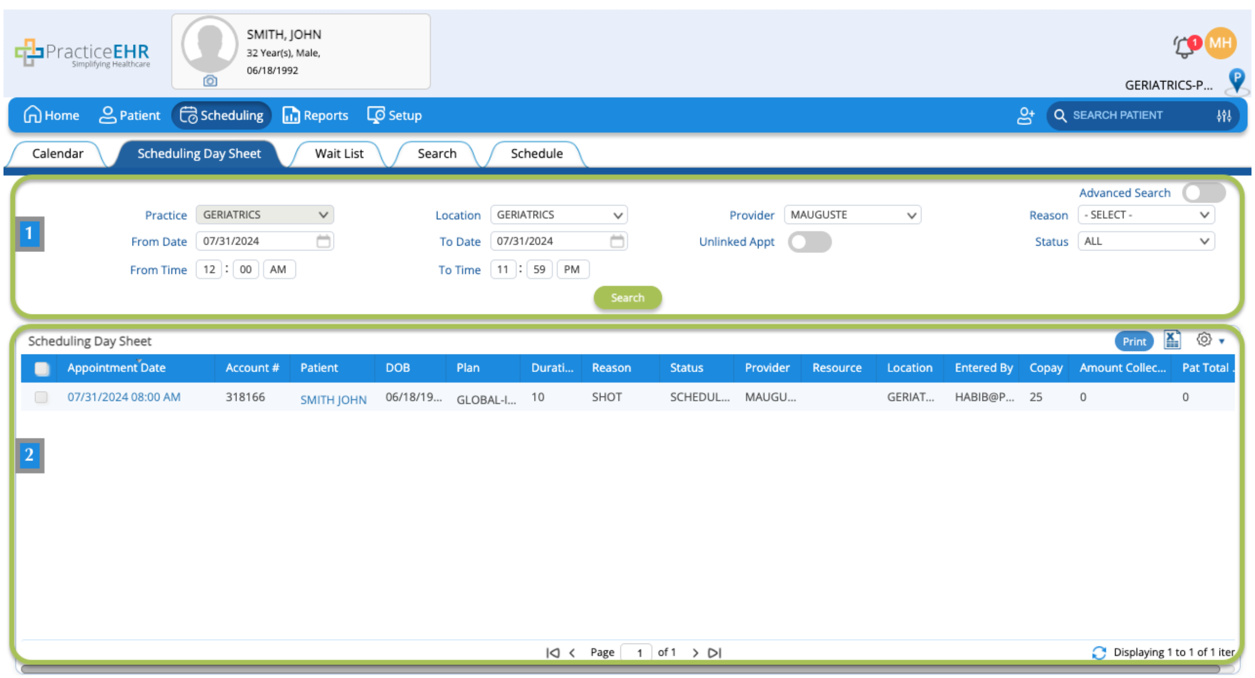
Scheduling Module

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. Scheduling Day Sheet

The Scheduling Day Sheet is the source of reporting for everything related to patient appointments. A user can search for all the appointments made for an individual patient or view all the appointments scheduled for a specific day.



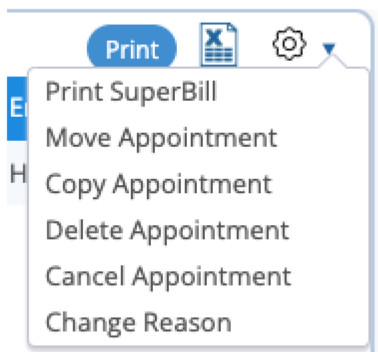
1.1. Search Options

This section allows the user to search for appointments using various search filters. The "**Advanced Search**" box should be checked if the user intends to search appointments using the patient's name.

When checked, the "**Unlinked Appt**" option allows the user to view appointments that have not been assigned a slot in the master calendar due to any changes made. The user can then reschedule the results as needed.

1.2. Search Result

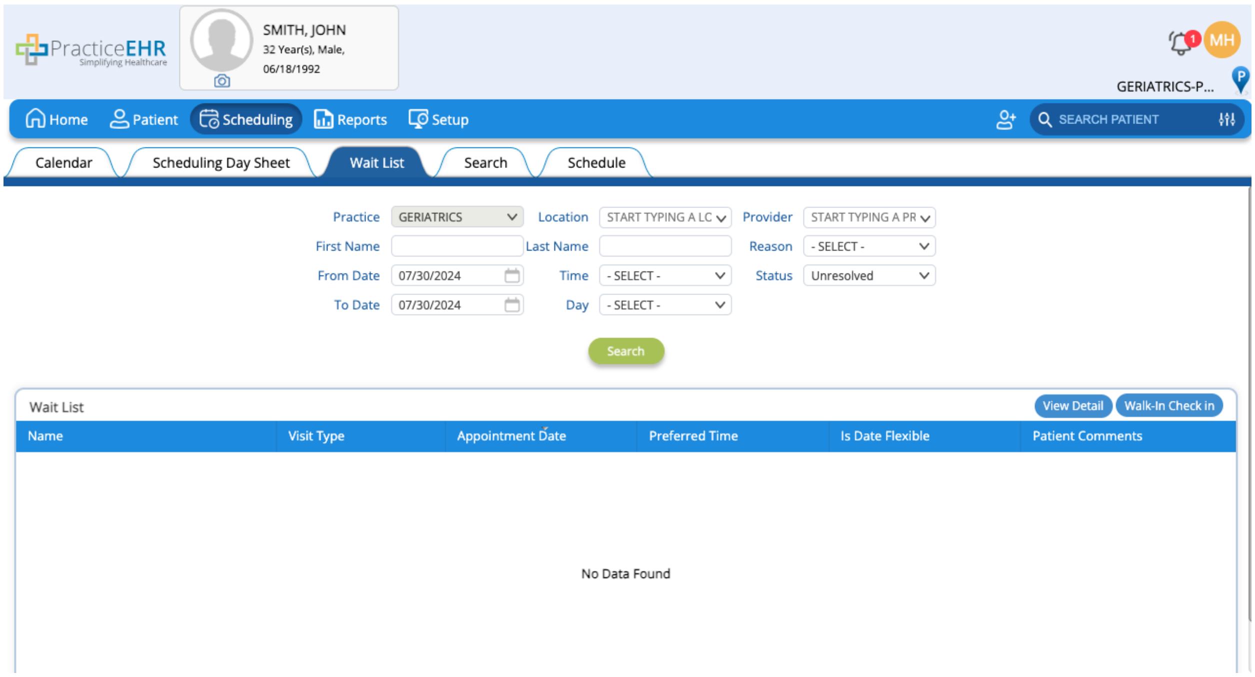
Once searched, the results will appear in this section as a list of appointments based on search filters. The user can select individual appointments or select all and take various actions using the gear icon:



- The user can move appointments from one provider, location, or date to another using the "**Move Appointment**" option.
- The user can also cancel or delete the selected appointments using the "**Cancel Appointment**" or "**Delete Appointment**" option, respectively. However, once deleted, the action can not be undone.

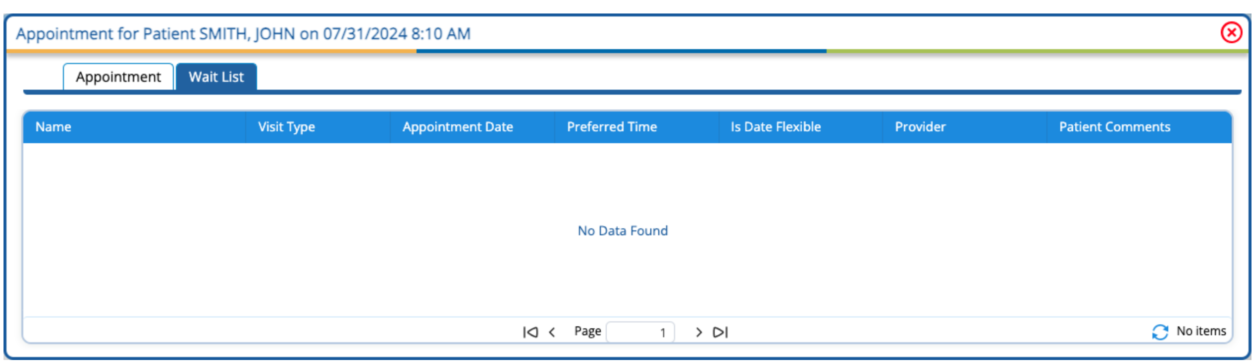
2. Wait List

The Wait List tab works in conjunction with the patient portal. Whenever a patient requests an appointment with a specific provider, the request appears on the wait list after the user performs a search for the provider.



Once an appointment request appears on the list, the user can book the requested appointment by following these steps:

- Go to "**Calendar**."
- Click the patient section against the required slot.



- Navigate to "**Wait List**."
- Book the appointment.

In case the patient calls to book the appointment after requesting on the patient portal and the user books an appointment for the patient using the calendar directly, the request can be resolved by clicking "**View Detail**" in the search result section of the Wait List tab.

The user can then select "**Resolved Manually**" from the "**Status**" drop-down menu and click "**Save"** to resolve the patient appointment request.

3. Schedule

The Schedule tab is used to create a master schedule or slots at the start of the scheduling process. The process has already been explained at the beginning of this guide.

