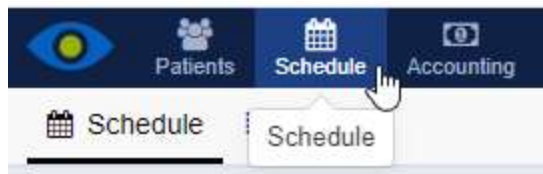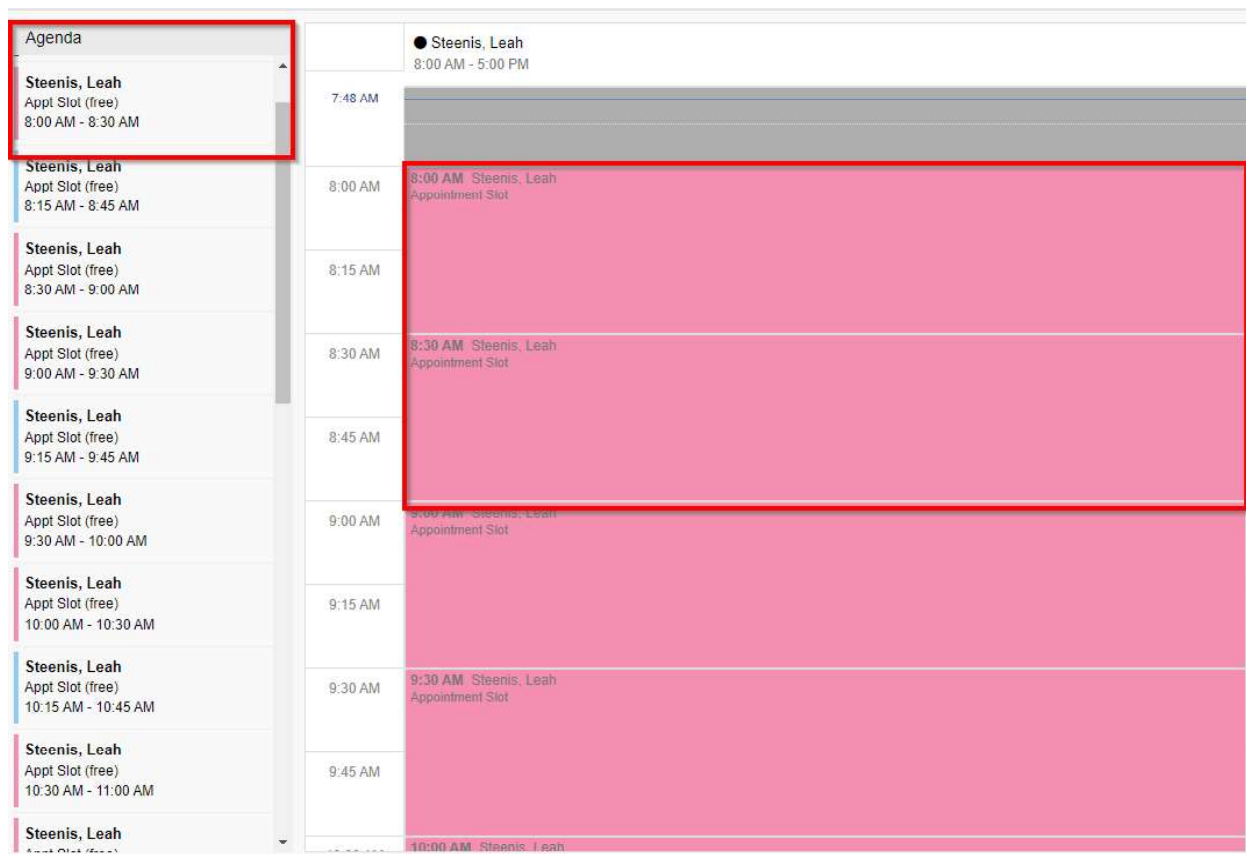# Creating an Appointment in an Appointment Slot

1. Select the Schedule module from the System Navigation bar

2. Within the Schedule module, there are a few ways to view the booked and open appointment slots. It's completely up to each user on how they choose to view the schedule. See the Schedule Filters video for a deeper dive into the available views; you can find the Schedule Filters video in the Patient Management topic within the assignment labeled Schedule

Free or available appointment slots that are open for booking will be displayed under the Agenda view as "Appt Slot (free)", you can also tell an appointment slot is available because it will display the provider name and say Appointment Slot
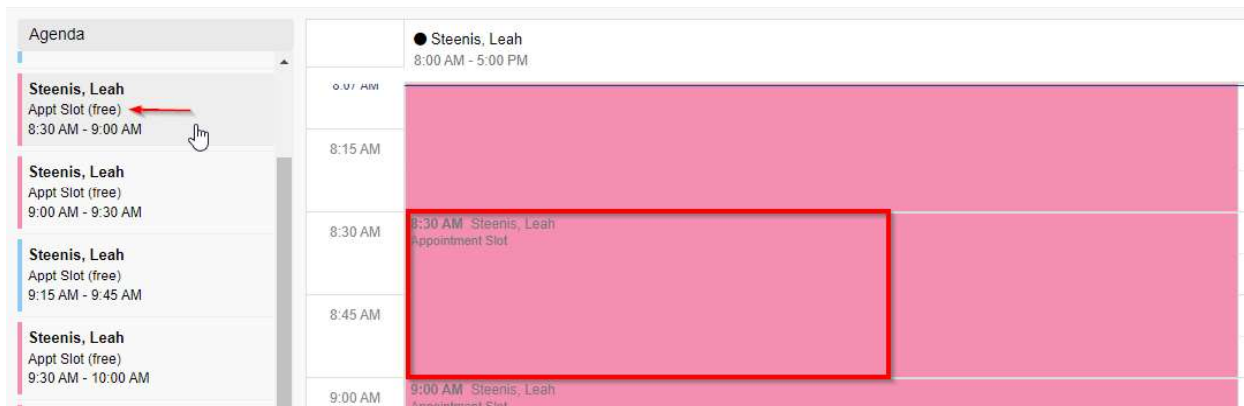
3. Single-click on the appointment slot you want to book. The Appointment Slot will open on the right side. Select Book Appointment.

4. The New Appointment screen will open on the right side. You will need to search for an existing patient, or add a new patient to be seen

5. When you search for and find the patient you are looking for, single click the patient name to populate them into the Patient field on the New Appointment screen
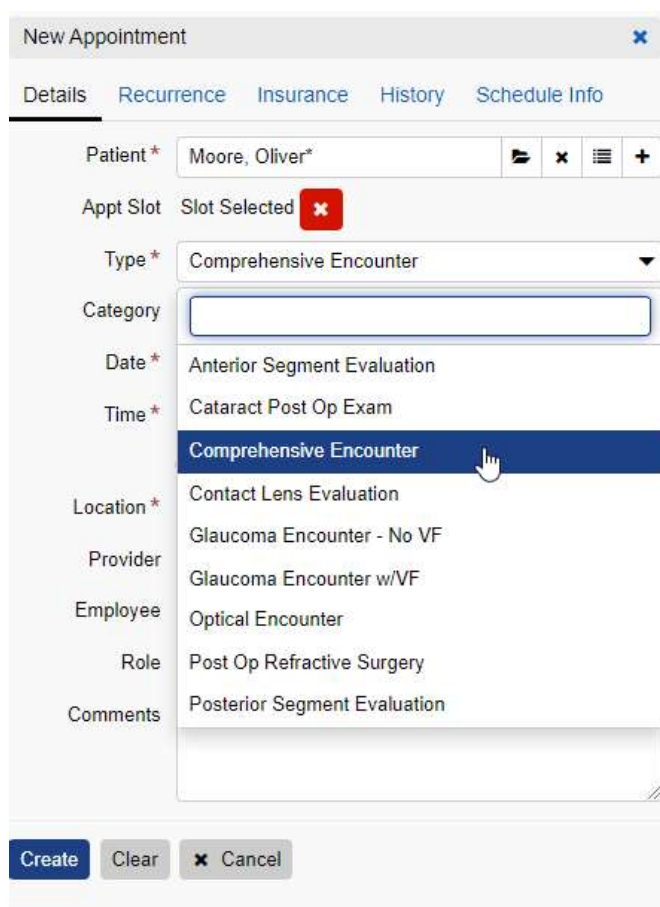
6. If you are adding a new patient, fill out the Add a Patient screen that pops up – all required fields will be marked with a red asterisk. After all information is entered in, select Add and the patient will be populated into the Patient field on the New Appointment screen

7. Select the Type dropdown to choose what kind of appointment the patient is coming in for. For example, a Comprehensive Exam, Medical Office Visit, etc
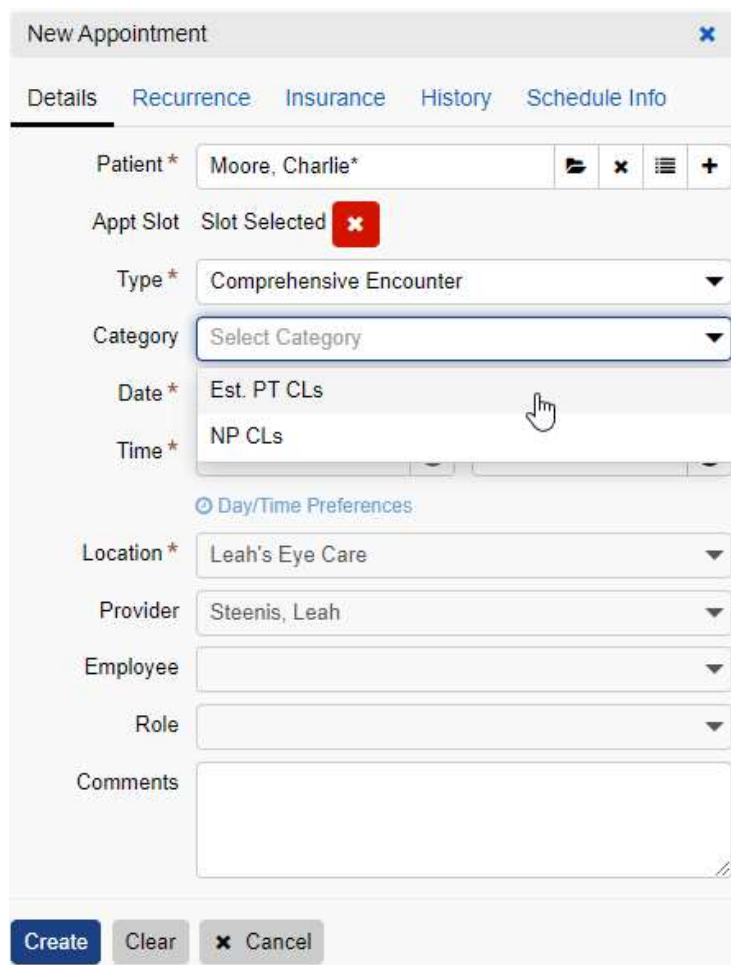
8. The Category dropdown is only used when subcategories are set-up in Admin. For example, some offices use subcategories to determine what type of Comprehensive, or medical exam they are seeing. If nothing is in the Category dropdown, this means that subcategories are not set up, or they are not set up for that particular exam template. You can still book an appointment without having the Category option selected

9. Select Create from the New Appointment screen. Your appointment will now display on the Schedule with the patient's name