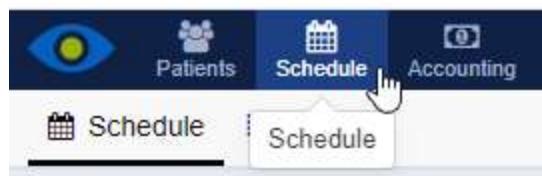
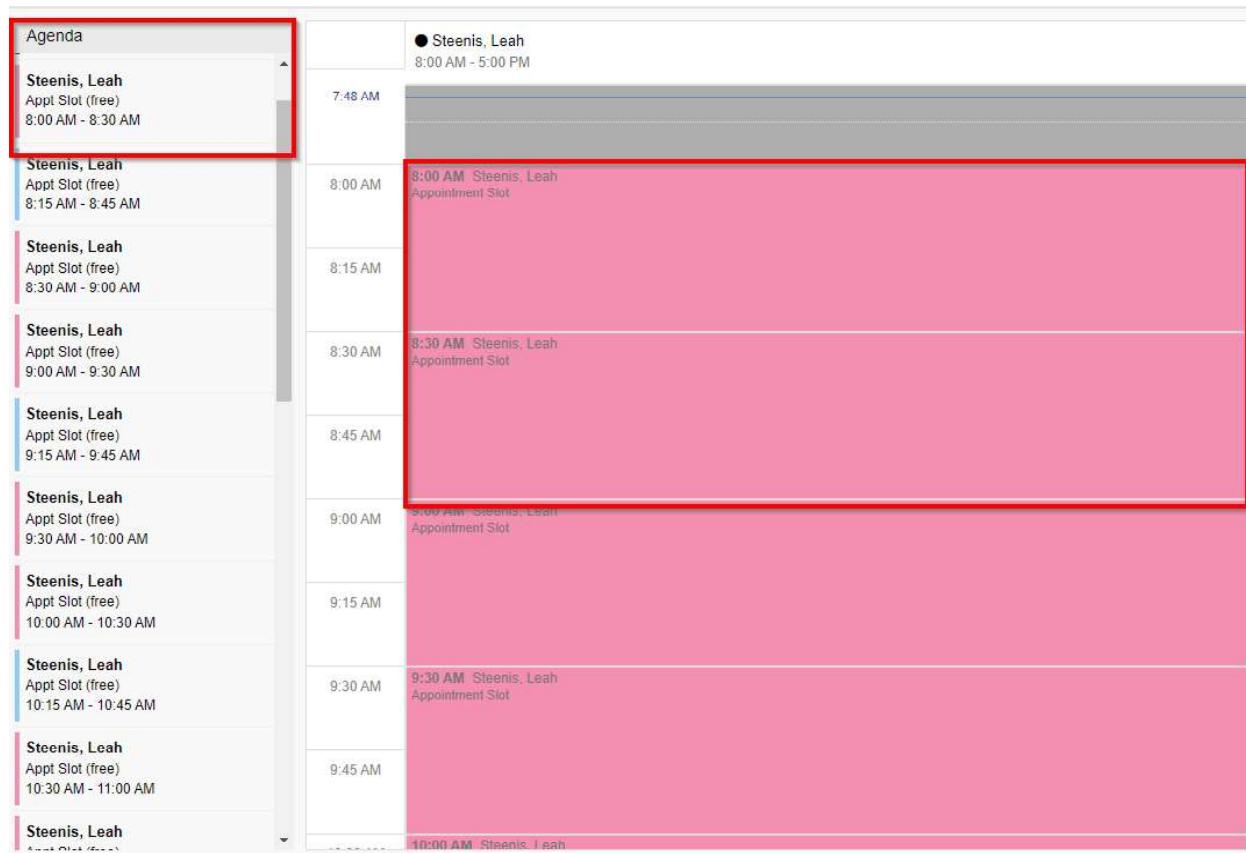


Creating an Appointment in an Appointment Slot

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



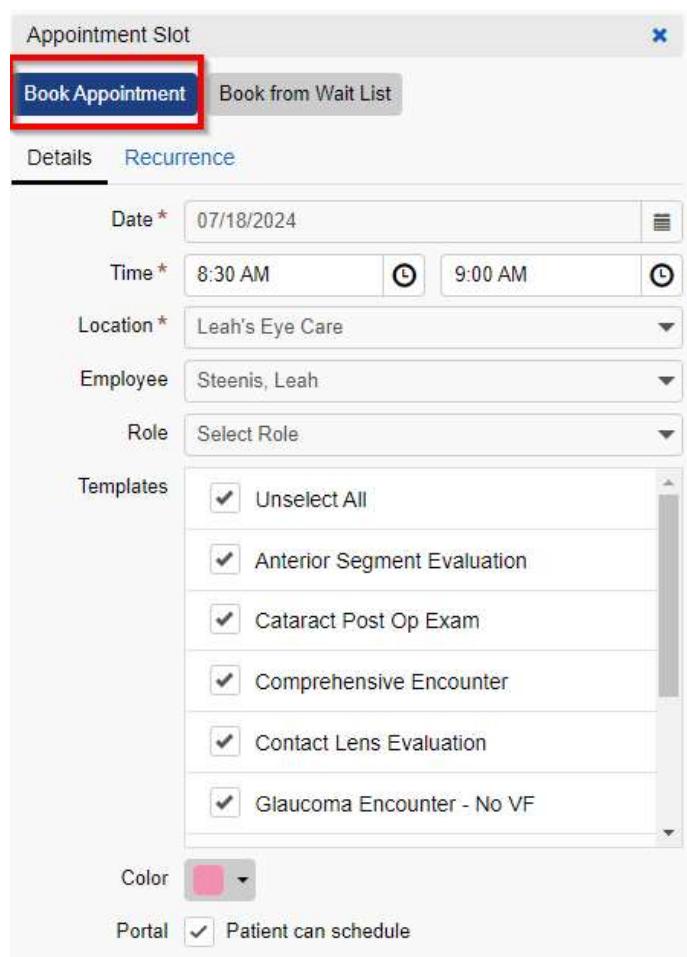
The screenshot shows the革命EHR Schedule module. On the left, a vertical list of appointment slots for 'Steenis, Leah' is displayed, each with a start and end time and a status of 'Apt Slot (free)'. On the right, a detailed view of the schedule for 'Steenis, Leah' is shown from 7:45 AM to 10:45 AM. The appointment slots are highlighted in pink. A red box highlights the first slot from 8:00 AM to 8:45 AM. Another red box highlights the entire 8:00 AM to 5:00 PM period, which is labeled as '● Steenis, Leah 8:00 AM - 5:00 PM'.

Slot	Start Time	End Time	Status
1	8:00 AM	8:45 AM	Apt Slot (free)
2	8:30 AM	9:00 AM	Apt Slot (free)
3	9:00 AM	9:45 AM	Apt Slot (free)
4	9:30 AM	10:00 AM	Apt Slot (free)
5	10:15 AM	10:45 AM	Apt Slot (free)

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.



Appointment Slot

Book Appointment **Book from Wait List**

Details **Recurrence**

Date * 07/18/2024

Time * 8:30 AM 9:00 AM

Location * Leah's Eye Care

Employee Steenis, Leah

Role Select Role

Templates

- Unselect All
- Anterior Segment Evaluation
- Cataract Post Op Exam
- Comprehensive Encounter
- Contact Lens Evaluation
- Glaucoma Encounter - No VF

Color

Portal Patient can schedule

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

New Appointment

Details Recurrence

Patient*   

Appt Slot 

Type*

Category

Date*

Time*  

Location*

Provider

Employee

Role

Comments

Create **Clear** **Cancel**

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

Select a Patient

ID	Name	DOB	Pref. Phone	Address
104391812	Moore, Charlie*	06/15/2000	(654) 123-7894	9654 Main Street, Madison, Wisconsin 53718
104349375	Moore, James*	09/13/1980	(123) 456-7894	1234 Starker Avenue, Madison, Wisconsin 53716
104391803	Moore, Oliver*	04/20/2015	(123) 456-7894	1236 Starker Avenue, Madison, Wisconsin 53716

Last Name First Name SSN

DOB Location Status

Phone ID

Search **Clear** 

1 of 1 pages (3 items)

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

New Appointment ×

Details Recurrence Insurance History Schedule Info

Patient *	Moore, Oliver*	   
Appt Slot	Slot Selected	
Type *	Comprehensive Encounter	
Category	<input type="text"/>	
Date *	Anterior Segment Evaluation	
Time *	Cataract Post Op Exam	
Location *	Comprehensive Encounter 	
Provider	Contact Lens Evaluation	
Employee	Glaucoma Encounter - No VF	
Role	Glaucoma Encounter w/VF	
Comments	Optical Encounter	
	Post Op Refractive Surgery	
	Posterior Segment Evaluation	

Create Clear Cancel

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

New Appointment ×

Details Recurrence Insurance History Schedule Info

Patient * Slot Selected x

Appt Slot Slot Selected x

Type *

Category

Date * NP CLs 

Time *

[Day/Time Preferences](#)

Location *

Provider

Employee

Role

Comments

Create Clear Cancel x

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

