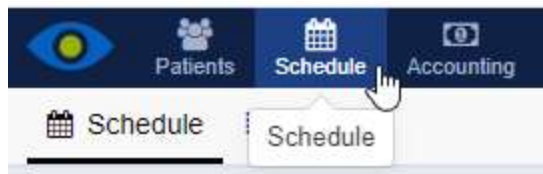
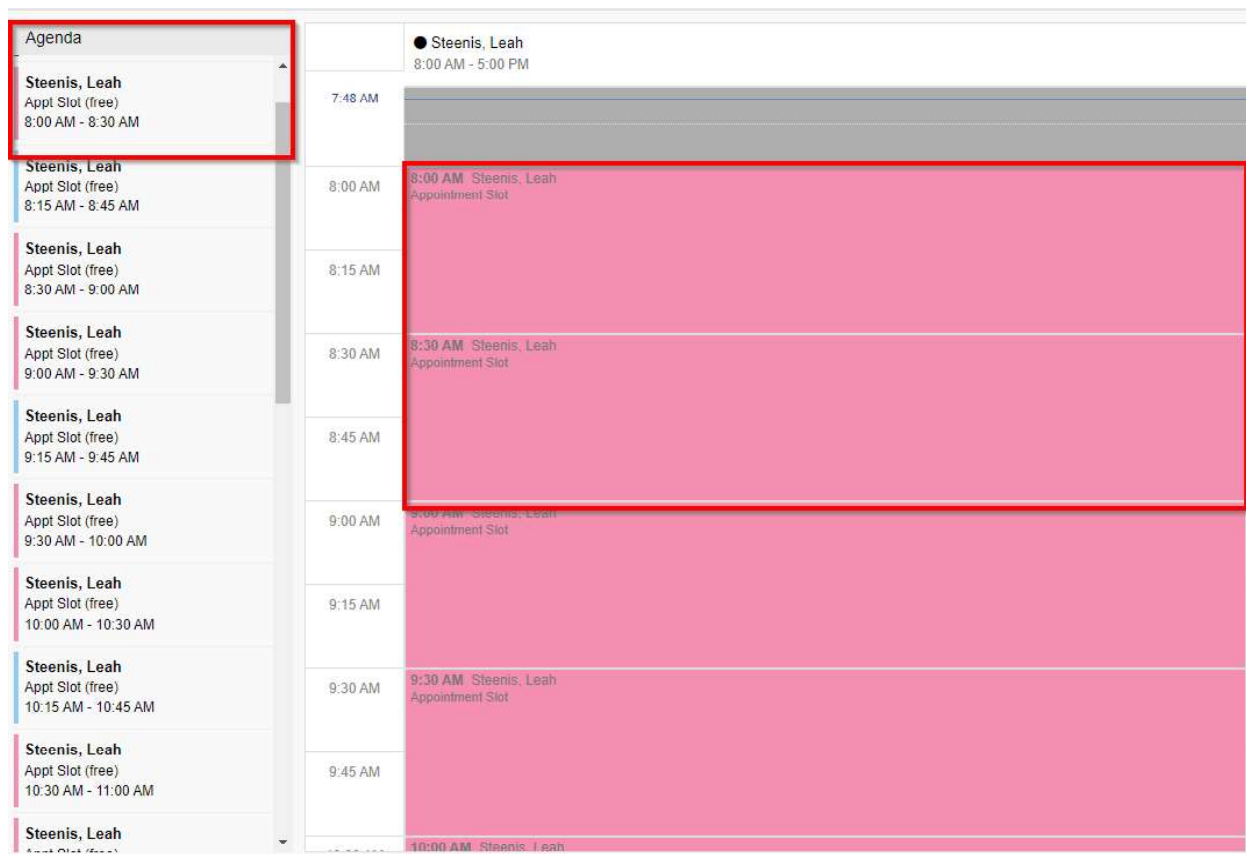


## Creating an Appointment in an Appointment Slot

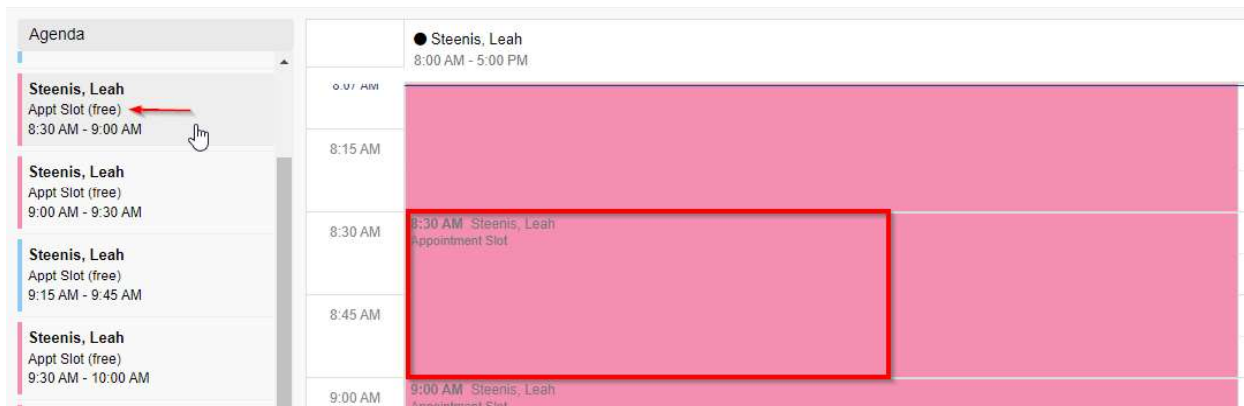
1. Select the Schedule module from the System Navigation bar



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



- 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

- 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 \*
Search Patients

Appt Slot
Slot Selected
Search Patients

Type \*
Select Template

Category
Select Category

Date \*
07/18/2024

Time \*
11:30 AM
12:00 PM

Location \*
Leah's Eye Care

Provider
Steenis, Leah

Employee

Role

Comments

Create
Clear
Cancel

- 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

Last Name
moore
DOB
mm/dd/yyyy
Location
All Locations

First Name
SSN
Phone
ID
Status
All Active Inactive

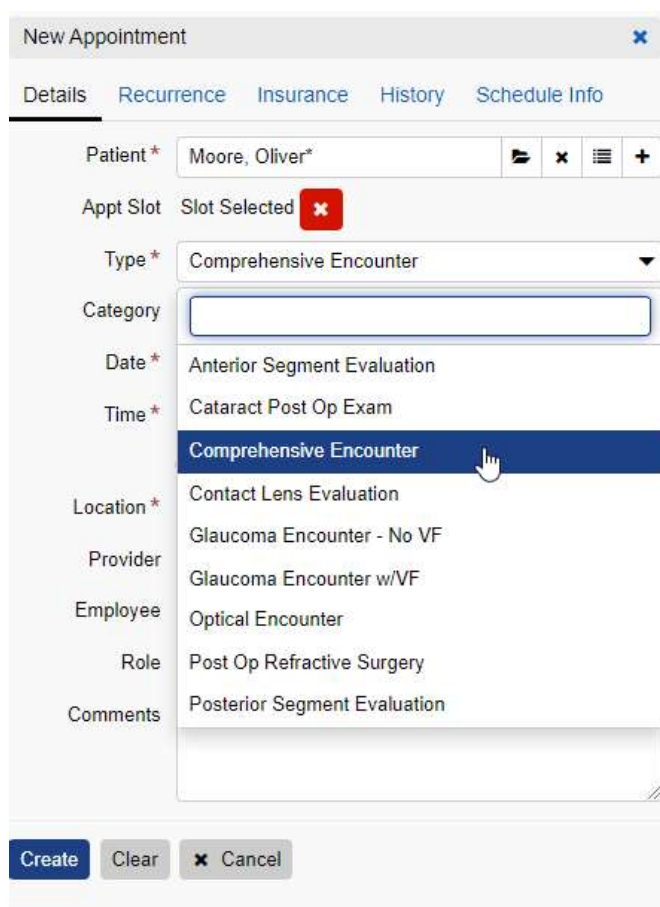
Q Search
Clear

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

10
Items per page
1 of 1 pages (3 items)

Cancel

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

Date \* Anterior Segment Evaluation

Time \* Cataract Post Op Exam

Location \* Contact Lens Evaluation

Provider Glaucoma Encounter - No VF

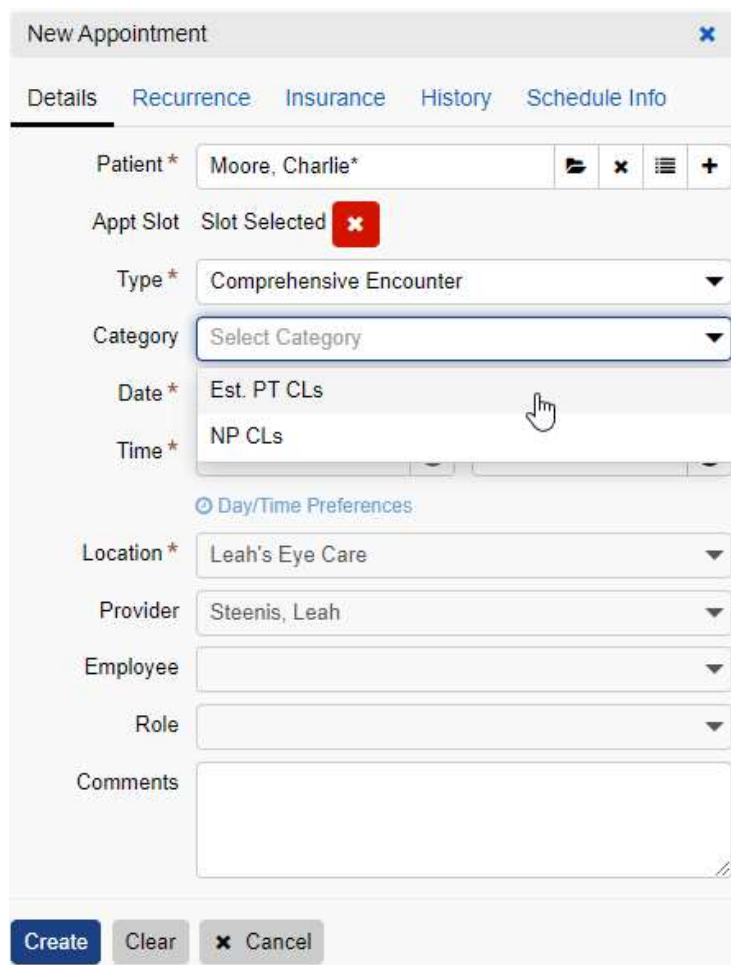
Employee Glaucoma Encounter w/VF

Role Optical Encounter

Comments 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 \* Moore, Charlie\*

Appt Slot Slot Selected

Type \* Comprehensive Encounter

Category Select Category

Date \* Est. PT CLs

Time \* NP CLs

Day/Time Preferences

Location \* Leah's Eye Care

Provider Steenis, Leah

Employee

Role

Comments

Create Clear Cancel

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

Agenda		● Steenis, Leah 8:00 AM - 5:00 PM	
Steenis, Leah Appt Slot (free) 8:00 AM - 8:30 AM		7:45 AM	
Steenis, Leah Appt Slot (free) 8:15 AM - 8:45 AM		8:01 AM	8:00 AM Steenis, Leah Appointment Slot
Moore, Charlie (New) (24) ● Steenis, Leah 8:30 AM - 8:50 AM		8:15 AM	
Steenis, Leah Appt Slot (free) 9:00 AM - 9:30 AM		8:30 AM	8:30 AM Moore, Charlie (24 Years) (New) Comprehensive Encounter (Est. PT CLs) Steenis, Leah
Steenis, Leah Appt Slot (free) 9:15 AM - 9:45 AM		8:45 AM	