

How To Schedule Appointments

Appointments are booked using the scheduling system. When you first open the scheduler you are taken to the **daily view** of the first provider (based on alphabetical order). Appointments can be booked in several ways as the scheduler offers multiple views or screens from which you can select the day and time. Besides the **daily view**, you can also use the **weekly view**, the **monthly view**, **2 multiple provider views**, the **calendar view**, the **select data function** and the **find time slot function**. Simply click on one of these buttons and you'll be started. Although each one offers its unique ways to book appointments, they all accomplish the same task, and that is to select a time and a date for the appointment.

How To Schedule An Appointment - Multiple Views

The screenshot shows a medical scheduling software interface. At the top, there are several view selection buttons: "Select Date Function", "Multiple Provider View #1", "Calendar View", "Monthly View", "Weekly View", and "Multiple Provider View #2". Below these are icons for different views: a calendar icon, a plus sign, a "P" (Daily View), a "M" (Monthly View), a "W" (Weekly View), and a grid icon. A red circle highlights the "M" and "W" icons. On the left, a calendar for March 2011 is shown, with a red circle around the dates 10, 11, 12, 13, 14, 15, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, 31. Below the calendar is a patient information form for "Adamson, Jennifer" (A841775). The form includes fields for Name, M.H.S.C. #, Phone, Reason (Botox), Referred (KREML, J), Date (04/03/2011), Time (10:00 AM), and Location (OF). A "Find Time Slot Function" callout points to a button in the "Find" section of the patient information form. On the right, a table shows the appointment schedule for "Adamson, Jennifer". The table has columns for Time, Name, Reason for a Visit, Stat, Loc, ID, and CNF. The schedule shows a Botox appointment at 10:00 AM and several "Lunch" slots from 12:00 PM to 12:45 PM. A red circle highlights the "Find Time Slot" button in the patient information form.

Notes: Although there is no one way to book an appointment, experienced users working in busy clinics tend to find that the monthly or weekly view offer the most efficient way to book an appointment. Both views display your schedule over many days making it very easy to spot an open time slot.

The Daily View and Select Date Function:

The daily view really works with the select date function. If you have more than one provider, you will also have to select the provider that you wish to book an appointment for. When you initially open the scheduler it goes to the **daily view** of the first provider using today's date (based on alphabetical order). You can change the provider by using either the **change doctor** button or **next provider** button. The

change doctor button is more efficient if you have more than three providers as it offers you a list of all providers that you can simply select (click and enter or just right click for advanced mouse users). The **next provider** button is really efficient for two or three providers as it simply toggles to the next provider on your list. With a large number of providers, this would take several mouse clicks. Once the provider is selected, their schedule comes up on the current date. You can go to whatever date you want by simply clicking on it in the **select date function**. Once you have the date, you select a time by clicking on the time slot you want on the daily view (click in the name column, not the time column). You can even select a time if there is already an appointment booked (double booking). The scheduler will simply add a second (or more) appointment at the same time.

The Daily View and Select Date Function

Select Date Function: Just click on the date you want. If you click on a date that's on the next month, the calendar display will move forward to the next month. You can also change the month and the year using the pull down and **enter** buttons.

Change Doctor Button **Next Provider Button**

Your selected date and time are displayed

To select a time slot click in the name column of the time slot that you want, (NOT the time column)

Time	Name	Reason for a Visit	Stat	Loc	ID	CNF
8:00 AM						OF
8:15 AM						OF
8:30 AM						OF
8:45 AM						OF
10:00 AM	Adamson, Jennifer	Botox	ARR	OF	BB	
10:15 AM						OF
10:30 AM						OF
10:45 AM						OF
11:00 AM						OF
11:15 AM						OF
11:30 AM						OF
11:45 AM						OF
12:00 PM		Lunch				OF
12:15 PM		Lunch				OF
12:30 PM		Lunch				OF
12:45 PM		Lunch				OF
1:00 PM						OF
1:15 PM						OF
1:30 PM						OF
1:45 PM						OF
2:00 PM						OF
2:15 PM						OF
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3:00 PM						OF
3:15 PM						OF
3:30 PM						OF
3:45 PM						OF
4:00 PM						OF
4:15 PM						OF
4:30 PM						OF
4:45 PM						OF

Now you can select the patient that you are booking an appointment for (either their name or their health number), indicate the reason for the appointment, indicate the referring practitioner (if any), indicate which staff member made the appointment and even add a note to the appointment. You can book for a patient that is already on file (an existing patient) or you can even book for a new patient. If the appointment is for an existing patient, you can select that patient by looking them up on your files. You can likely find the patient faster if you first type in their last name or even a part of their last name and pressing the ENTER key on your keyboard. **Or, you can find a matching patient by entering their**

health number. Likewise an appointment reason, referring doctor and staff ID can be looked up or you can find them faster by typing in the appointment reason and/or the referring doctor's last name or a part of the last name and the staff ID and pressing the ENTER key on your keyboard. If what you typed is unique (only one matching record) then that patient, reason, referring doctor or staff ID will be immediately selected. If there is more than one match (ie; last name JONES), then the program opens to a list of all matching records and allows you to select the one you want.

HINT: When looking for an existing patient with a common last name (ie; JONES), you can narrow the search by adding their first name or a part of their first name. The entry must be last name then comma then the first name. This is entered as JONES, ROBERT or even JONES, RO).

HINT: When looking for an existing patient with an uncommon and complex last name (ie; ANDRAXOULOUS) it will likely be quicker to simply enter a part of the last name and pressing the ENTER key and let the program find the matching patient (ie; ANDRAX)

HINT: To make it efficient, use short descriptions for appointment reasons (ie; CPX instead of Complete Annual Physical).

Entering name, healthcare number, reason, referring doc and staff ID

Callout boxes in the screenshot:

- Lookup buttons. Clicking on these opens up the corresponding list (ie, patients, reasons, etc)
- Patient name entered here
- Health care number
- Appointment Reason
- Referring doctor
- Staff ID
- Patient's digital picture will display if stored in the patient file. Question mark button will display personal notes about the patient

Time Slot	Name	Reason for a Visit	Stat	Loc	ID	CNF
9:00 AM						OF
9:15 AM						OF
9:30 AM						OF
9:45 AM						OF
10:00 AM	Adamson, Jennifer	Botox	ARR		BB	
10:15 AM						OF
10:30 AM						OF
10:45 AM						OF
11:00 AM						OF
11:15 AM						OF
11:30 AM						OF
11:45 AM						OF
12:00 PM						OF
12:15 PM		Lunch				OF
12:30 PM		Lunch				OF
12:45 PM		Lunch				OF
1:00 PM						OF
1:15 PM						OF
1:30 PM						OF
1:45 PM						OF
2:00 PM						OF
2:15 PM						OF
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2:45 PM						OF
3:00 PM						OF
3:15 PM						OF
3:30 PM						OF
3:45 PM						OF
4:00 PM						OF
4:15 PM						OF
4:30 PM						OF
4:45 PM						OF

The Weekly View:

The **weekly view** provides a way for users to more quickly identify and select an open time slot when booking an appointment. You can access your weekly view by simply clicking on the weekly view (or W) button. You can easily spot an open time slot as it is simply displayed as white space. Appointments are

displayed and can readily be identified. To select a time slot you either click on the time slot and then press enter or right click on the time slot. This will take you back to daily view to the date and time that you selected on the weekly view.

While in the weekly view you can change to provider to see their view. You can easily scroll from one week to the next. If you wanted to see the details of any booked appointments, you can simply double click on the appointment. This is commonly called a drill down function.

One of the big features for the weekly view is that you can book multiple appointments for the same patient. To do this though, you need to first select the patient, indicate a reason and then open the weekly view. Once there, click on the **create multiple appointments** box and then start clicking on the dates and times you want to book for that patient. When you've finished selecting the dates and times click on **the show appointment template** button. This will display the appointment dates you've selected. Now you can click on the **save template** button, to save the appointments to the scheduler.

Weekly View

To select multiple dates and times, simply indicate multiple appointment flag (below) and click to select

You can book multiple appointments, but the patient and the appointment reason must be first done

Change the provider

Scroll one week forward or back

Change month and year

Change locations

Weekly View

DR. JEN MCKOY

March 2011

Loc: OF

Today

Return

Close

Date	Time	Reason	Time	Mo. Mar 7	Tu. Mar 8	We. Mar 9	Th. Mar 10	Fr. Mar 11	Sa. Mar 12	Su. Mar 13
Mar-7-2011	9:30 AM	CHECK UP (FULL)	9:00 AM							
Mar-8-2011	10:00 AM	CHECK UP (FULL)	9:15 AM							
Mar-9-2011	10:00 AM	CHECK UP (FULL)	9:30 AM							
Mar-10-2011	10:00 AM	CHECK UP (FULL)	9:45 AM							
			10:00 AM		X	X	X			
			10:15 AM							
			10:30 AM							
			10:45 AM							
			11:00 AM							
			11:15 AM							
			11:30 AM							
			11:45 AM							
			12:00 PM	Lunch	Lunch	Lunch	Lunch	Lunch	Lunch	Lunch
			12:15 PM	Lunch	Lunch	Lunch	Lunch	Lunch	Lunch	Lunch
			12:30 PM	Lunch	Lunch	Lunch	Lunch	Lunch	Lunch	Lunch
			12:45 PM	Lunch	Lunch	Lunch	Lunch	Lunch	Lunch	Lunch
			1:00 PM							
			1:15 PM							
			1:30 PM							
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			4:00 PM							
			4:15 PM							
			4:30 PM							
			4:45 PM							

Save template

Time	Name	Reason
9:30 AM	Adamson, Jennifer	CHECK UP (FULL)

Once multiple dates are selected, click the Show Appointment Template button to view your selected dates and then save all appointments at the same time

The Monthly View:

The **monthly view** provides a way for users to more quickly identify and select an open time slot when booking an appointment. You can access your monthly view by simply clicking on the monthly view (or M) button. You can easily spot an open time slot as it is simply displayed as white space. Appointments are displayed and can readily be identified. To select a time slot you either click on the time slot and then press enter or right click on the time slot. This will take you back to daily view to the date and time that you selected on the monthly view.