
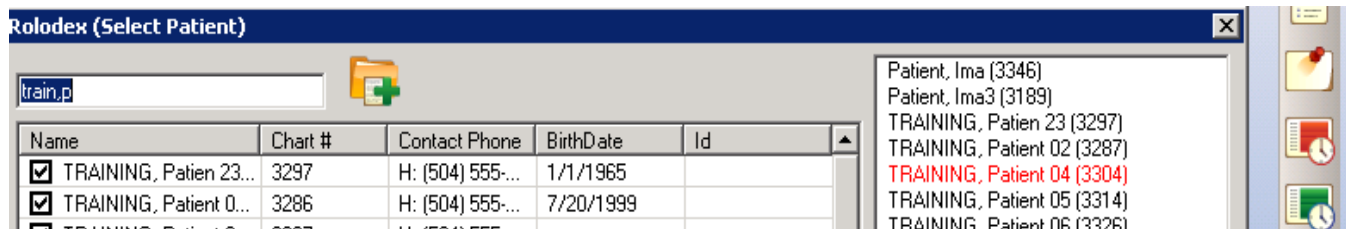


## Scheduling Patients

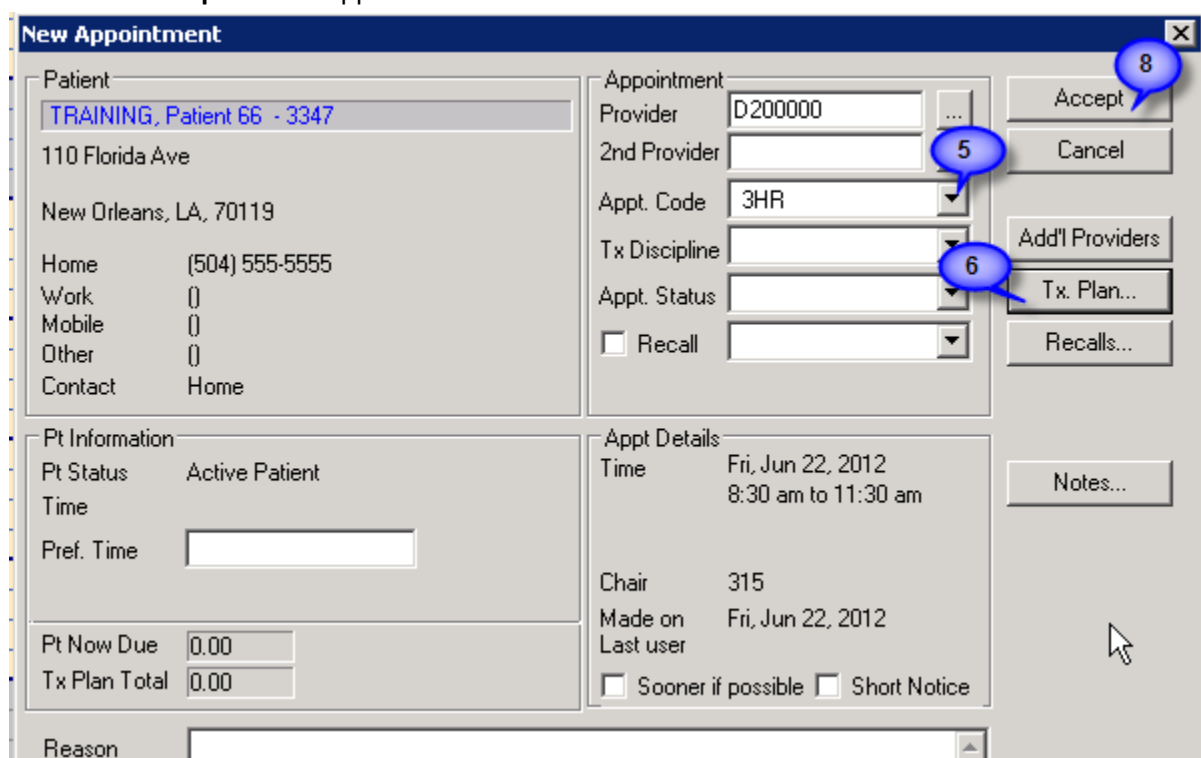
Go to Scheduler module 

1. If the book you wish to schedule in does not display, click on **book icon**  in upper right hand corner of scheduler screen to select scheduling book. (Will open to the book you use most often)
2. **Double click** on beginning of desired appointment time slot in your column.
3. type in **last name or chart #** of patient in rolodex window- or **select patient** from list at right of window- Enter



Name	Chart #	Contact Phone	BirthDate	Id
<input checked="" type="checkbox"/> TRAINING, Patien 23...	3297	H: (504) 555-...	1/1/1965	
<input checked="" type="checkbox"/> TRAINING, Patient 0...	3286	H: (504) 555-...	7/20/1999	
<input checked="" type="checkbox"/> TRAINING, Patient 0...	3287	H: (504) 555-...		

4. **double click** on patient name -
5. **choose appointment** length by choosing Appt Code
6. In the New appointment window, click on **Tx Plan** button
7. **move procedure** you plan to do at this appointment from Planned Treatments (left side) to Appointed Treatments (right side)- Close
8. hit **Accept** in New Appointment window



**New Appointment**

Patient: TRAINING, Patient 66 - 3347  
 110 Florida Ave  
 New Orleans, LA, 70119  
 Home: (504) 555-5555  
 Work: ()  
 Mobile: ()  
 Other: ()  
 Contact: Home

**Appointment**  
 Provider: D200000  
 2nd Provider:   
 Appt. Code: 3HR  
 Tx Discipline:   
 Appt. Status:   
☐ Recall

**Buttons:** Accept (8), Cancel, Add'l Providers, Tx. Plan... (6), Recalls...  
 Numbered callout 5 points to the Appt. Code dropdown.

**Pt Information**  
 Pt Status: Active Patient  
 Time:   
 Pref. Time:   
 Pt Now Due: 0.00  
 Tx Plan Total: 0.00

**Appt Details**  
 Time: Fri, Jun 22, 2012 8:30 am to 11:30 am  
 Chair: 315  
 Made on: Fri, Jun 22, 2012  
 Last user:   
☐ Sooner if possible ☐ Short Notice

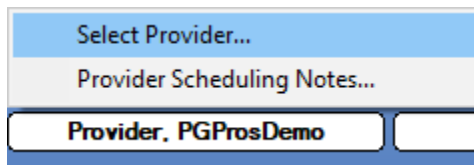
Reason:   
 Notes...

**To open a chart -Right click** on an appointment – **select patient** to open patient record.

**Reschedule-** right click on appointment slot- select reschedule- appointment slot turns yellow- go ahead to new appointment- drag yellow appointment to new appointment slot- double click to insert appointment.

**Cancel, fail, delete appointment-** right click on appointment slot. Always indicate if patient failed, canceled less or greater than 24 hour notice. Only use delete if you made appointment by mistake. This will display in patient card. Click on patient name in status bar at bottom of screen TRAINING, Patient1 (M51) to open patient card.

## Clinic Time Exceptions- How to restore a provider to the Schedule



Select Provider...  
Provider Scheduling Notes...  
**Provider, PGProsDemo**

Select **Provider** button at bottom of **Scheduler** window

Enter **Last Name** in **Criteria** field- Click on **Last Name** column heading

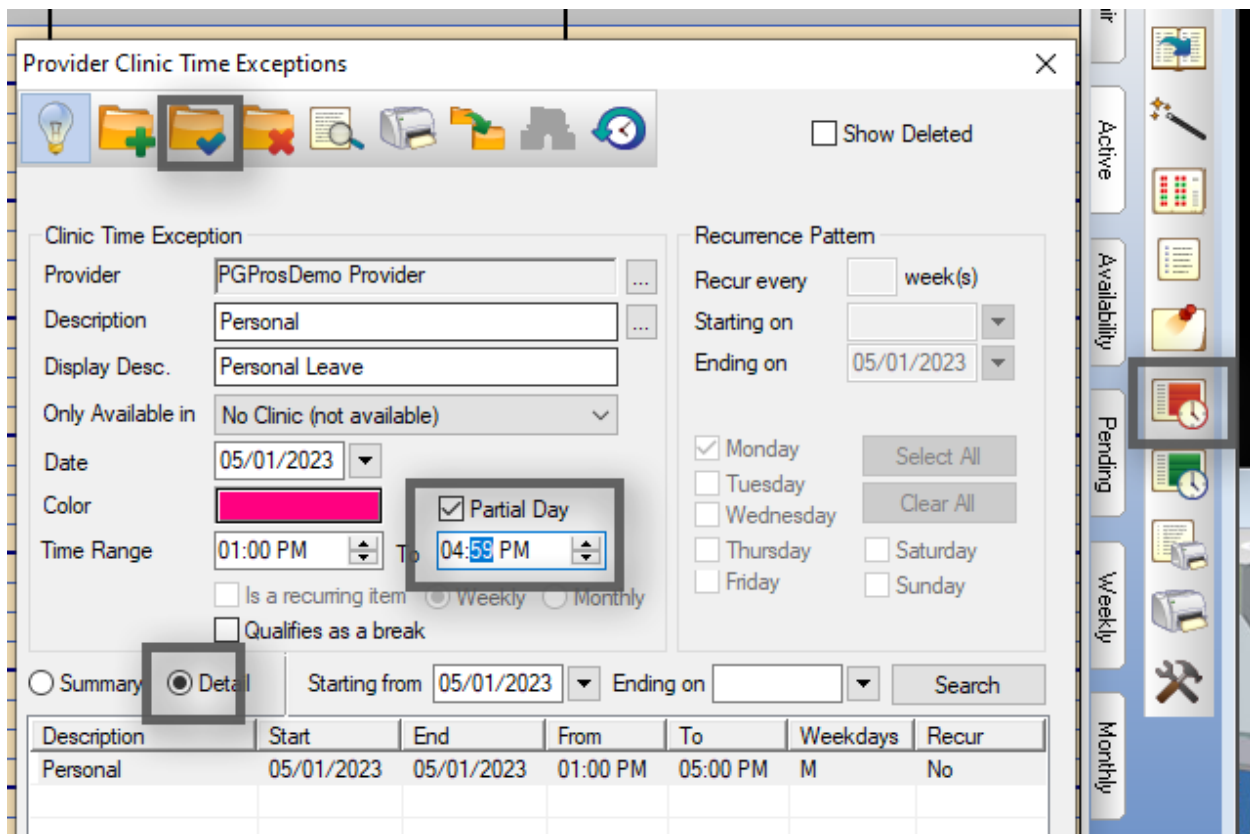
Select **Clinic Time Exceptions** button 

Select the **Detail** button to sort by each date

Select entry causing the problem

Change the end time to 4:59 instead of 5:00 pm

Hit the **Modify** (blue check) button



Provider Clinic Time Exceptions

☐ Show Deleted

Clinic Time Exception

Provider: PGProsDemo Provider

Description: Personal

Display Desc.: Personal Leave

Only Available in: No Clinic (not available)

Date: 05/01/2023

Color:

Time Range: 01:00 PM To 04:59 PM

☒ Partial Day

☐ Is a recurring item ☐ Weekly ☐ Monthly

☐ Qualifies as a break

Recurrence Pattern

Recur every:  week(s)

Starting on:

Ending on: 05/01/2023

☒ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday ☐ Saturday ☐ Sunday

Select All Clear All

☐ Summary ☒ Detail

Starting from: 05/01/2023 Ending on:  Search

Description	Start	End	From	To	Weekdays	Recur
Personal	05/01/2023	05/01/2023	01:00 PM	05:00 PM	M	No