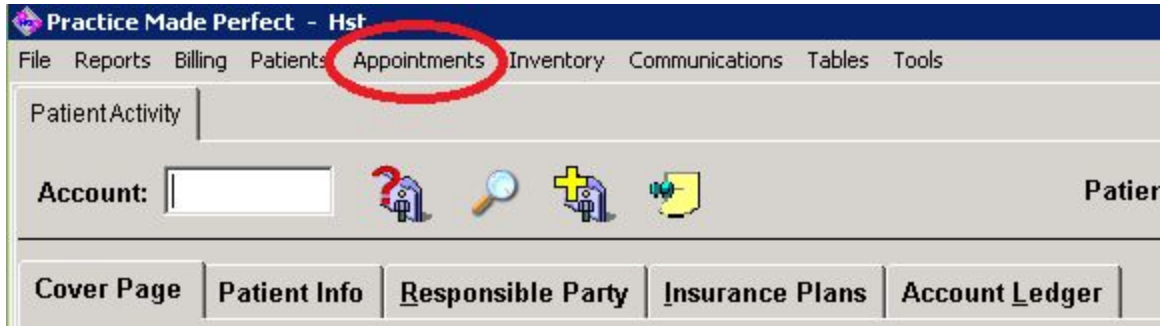


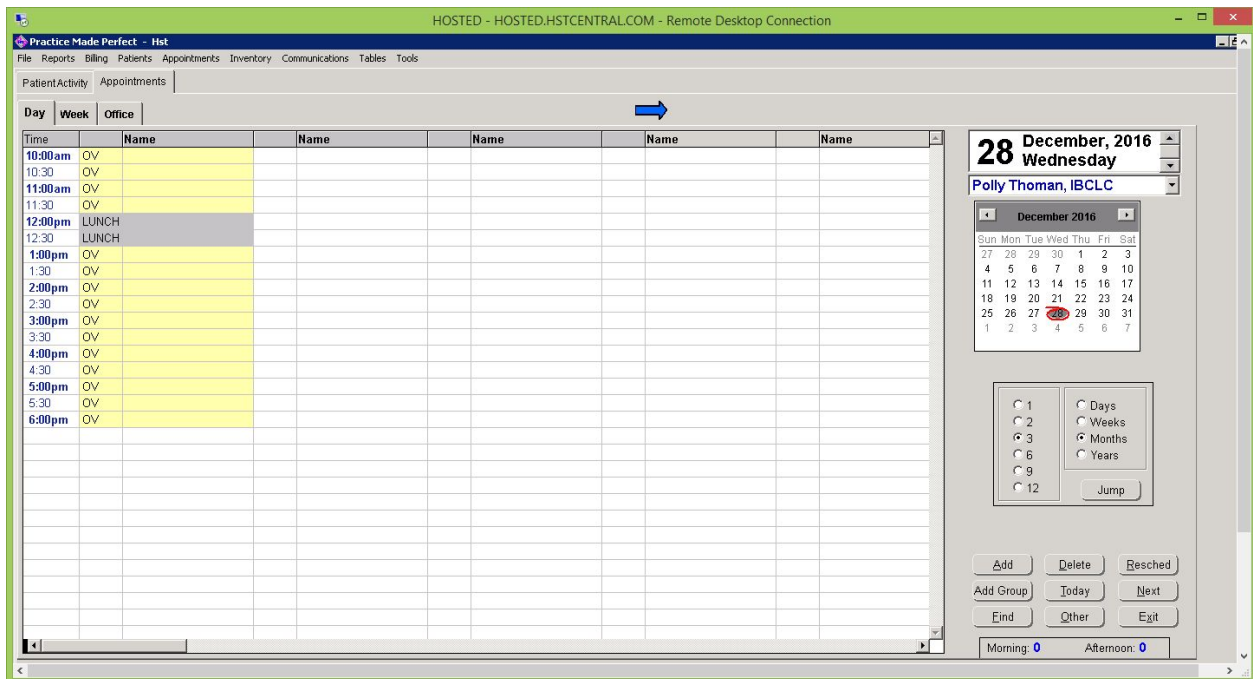
Appointments

Scheduling Appointments

Click on Appointments tab.



This takes you to Appointment screen.



There are numerous ways to navigate through the calendar.

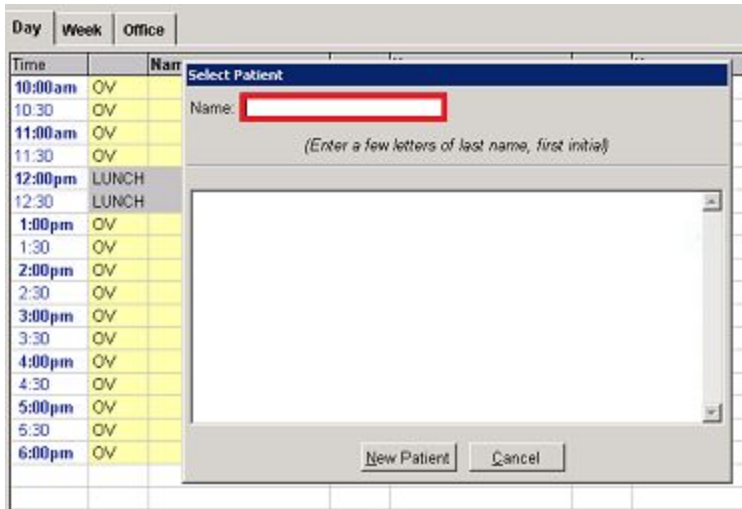
1. Use Date/Day Calendar
2. Use Monthly Calendar
3. Jump ahead

The screenshot shows a software interface for a calendar. At the top, it displays the date "28 December, 2016 Wednesday" and the name "Polly Thoman, IBCLC". Below this is a monthly calendar grid for December 2016, with the date "28" circled in red. To the right of the calendar grid, there are three red arrows pointing left towards the interface. Below the calendar grid is a section with radio buttons for navigation: "1", "2", "3", "6", "9", "12" on the left, and "Days", "Weeks", "Months", "Years" on the right. The "Months" option is selected, and the "Jump" button below it is circled in red. At the bottom, there are buttons for "Add", "Delete", "Resched", "Add Group", "Today", "Next", "Find", "Other", and "Exit". At the very bottom, it shows "Morning: 0" and "Afternoon: 1".

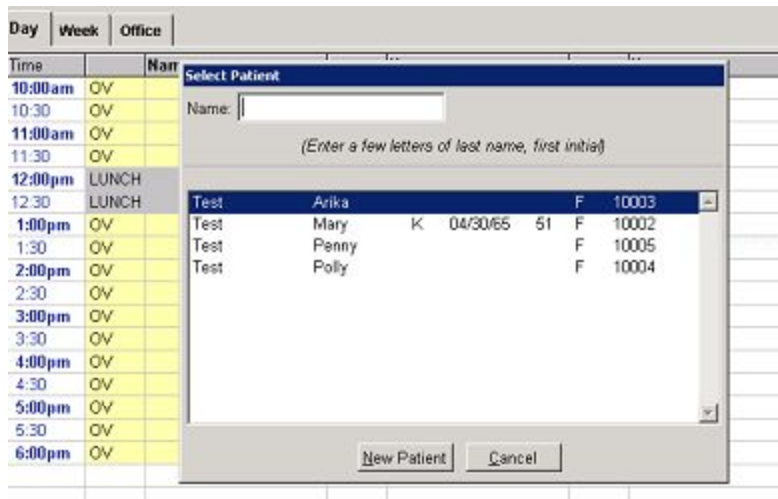
*You can see the number of **morning** and **afternoon** appointments scheduled for date chosen.

Once you choose a date and time for an appointment, double click on that date/time in the schedule.

This will bring up the **Select Patient** window. Search for patient in Name field.



Double click on correct patient.



Add Appointment window will appear along with snapshot of patient record. Make sure **Reason** for visit is correct. Other options can be chosen by clicking on the search icon to the right of this field. Click **Save** to Add this patient to the schedule. Appointment scheduling is complete.

If you need to change Patient, Time, Reason, Length of appointment or Add a Note, click into that field. You can search for another patient from Account Field. You can add a note as office requires.

The image shows a patient record window and an 'Add Appointment' dialog box overlaid on it. The patient record window displays the following information:

Name	Name
Account: 10003	
Name: Arika Test	
Address:	
Phone: - -	
585-	Next Visit: 12/29/2016
DOB: / /	Last Visit: 12/12/2016
Pat Bal: 103.31	Co-Pay: 0.00
Ins: BCBS	Prv: 1

The 'Add Appointment' dialog box contains the following fields and controls:

- Account:
- Test, Arika**
- Time:
- Reason:
- Length:
- Note:
-

The 'Save' button is circled in red.

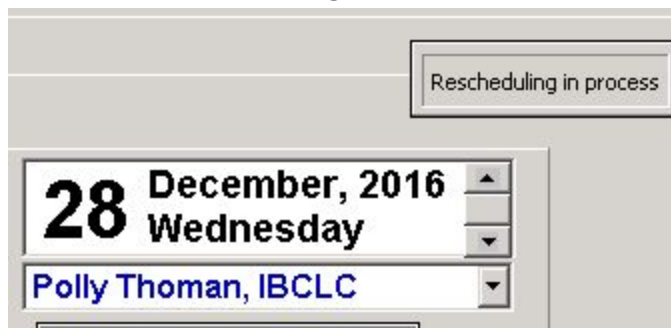
Rescheduling Appointments

Find patient appointment in schedule. Click once on the patient's name to highlight then click Reschedule button on bottom right of screen.

Day	Week	Office	
Time		Name	
10:00am	OV		
10:30	OV		
11:00am	OV		
11:30	OV		
12:00pm	LUNCH		
12:30	LUNCH		
1:00pm	OV		
1:30	OV		
2:00pm	OV	Test, Arika	
2:30	OV		
3:00pm	OV		
3:30	OV		
4:00pm	OV		
4:30	OV		
5:00pm	OV		
5:30	OV		
6:00pm	OV		



Make sure “Rescheduling in process” box appears in upper right corner.



Choose new date and time and double click on that time in the schedule. Patient name will appear at the new date and time and be removed from the old date and time.

Reschedule complete.

Edit Appointment

Edit appointment by double clicking on the appointment.

Never Delete an appointment due to cancellation or reschedule. Use Edit and Reschedule functions so office can track patient's appointment record.

Edit Appointment

Appointment Status:

- Appointment confirmed
- Appointment complete (charges posted)

Missed Appointment:

- Patient did not show up for appointment
- Patient canceled appointment

Reason:

Provider:

Date	Time	Reason	Length	Column
12/28/16	2:00pm	OV	30	1

Note:

Account: 10003
Name: Arika Test
Address:
Phone: - -
DOB: / /
Pat Bal: 103.31
Ins: BCBS

Next Visit: 12/29/2016
Last Visit: 12/12/2016
Co-Pay: 0.00
Prv: 1

Click on **Appointment** button from Patient Activity Screen to bring up patient's past and future appointments.

Practice Made Perfect - Hst
 File Reports Billing Patients Appointments Inventory Communications Tables Tools

PatientActivity

Account: 10003 Patient: Arika Test

Cover Page Patient Info Responsible Party Insurance Plans Account Ledger

Patient Info

Age: Sex: F
 Date of Birth: / /
 Last Visit: 12/12/16
 Next Visit: 12/29/16 10:00am
 Provider: 1
 Chart #:
 Category: Regular

Responsible Party

First Name:
 Last Name: Test
 Home Phone: -
 Work Phone:
 Relation: Self
 Billing Status: Regular
 Pat Balance: 103.31
 Ins Balance: 0.00

Plan Insured Party ID
 Blue Cross And Bl Arika Test UGG922000021
 Blue Cross And Bl Dan Test 9UGG

Patient Notes

Charge Payments Walk-Out **Apptmnt** Exit

Patient Appointments window:

Patient Appointments

Account: 10003 Arika Test

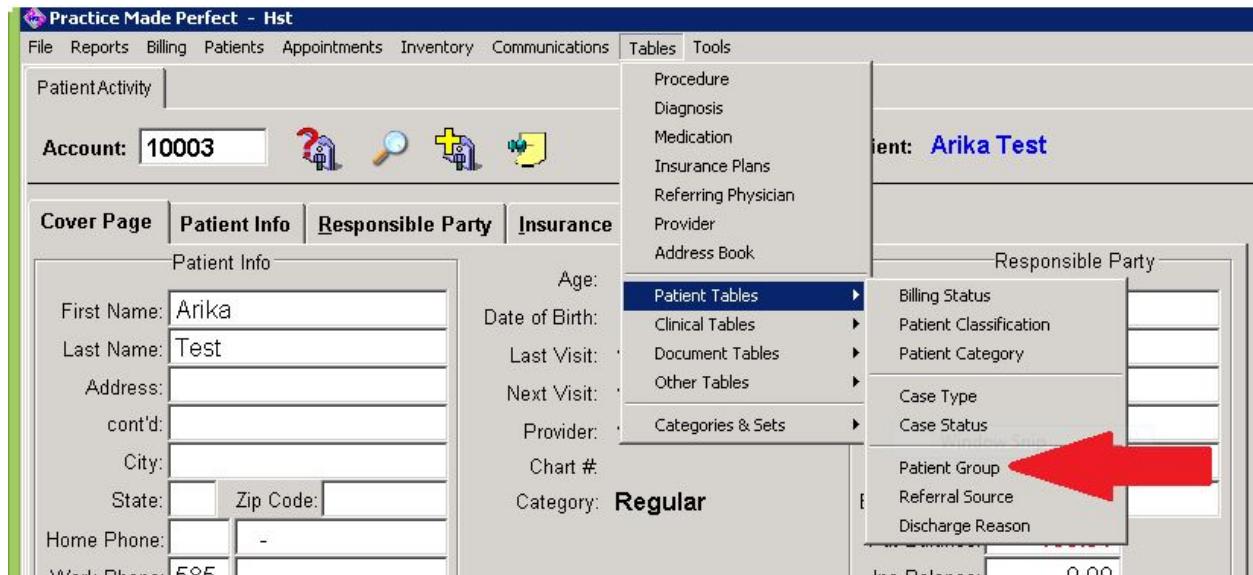
Date	Day	Time	Status	Provider	Type	Note
01/25/17	Wednesday	11:00am		Polly Thoman, IBCLC	Office Visit	
01/12/17	Thursday	10:00am		Polly Thoman, IBCLC	Breast Feeding 10	
01/11/17	Wednesday	3:00pm	Re-Scheduled	Polly Thoman, IBCLC	Office Visit	
01/05/17	Thursday	10:00am		Polly Thoman, IBCLC	Breast Feeding 10	
12/30/16	Friday	5:00pm	Re-Scheduled	Polly Thoman, IBCLC	Office Visit	
12/29/16	Thursday	10:00am		Polly Thoman, IBCLC	Breast Feeding 10	
12/29/16	Wednesday	2:00pm	Re-Scheduled	Polly Thoman, IBCLC	Office Visit	
12/27/16	Tuesday	11:00am	No-Show	Polly Thoman, IBCLC	Consult	failure to thrive
12/21/18	Wednesday	2:00pm		Polly Thoman, IBCLC	Office Visit	
12/20/18	Tuesday	10:00am		Polly Thoman, IBCLC	Breast Feeding 10	
12/19/18	Monday	1:00pm		Polly Thoman, IBCLC	Child Birth Educat	
12/19/18	Monday	10:00am		Polly Thoman, IBCLC	Breast Feeding 10	
12/13/18	Tuesday	11:15am		Polly Thoman, IBCLC	Office Visit	
12/13/18	Tuesday	11:00am	Re-Scheduled	Polly Thoman, IBCLC	Office Visit	
12/13/18	Tuesday	10:00am		Polly Thoman, IBCLC	Breast Feeding 10	
12/12/18	Monday	11:00am	Re-Scheduled	Polly Thoman, IBCLC	Office Visit	
12/12/18	Monday	10:00am		Polly Thoman, IBCLC	Breast Feeding 10	
12/05/18	Monday	10:00am		Polly Thoman, IBCLC	Breast Feeding 10	

Add Item Delete Item Exit

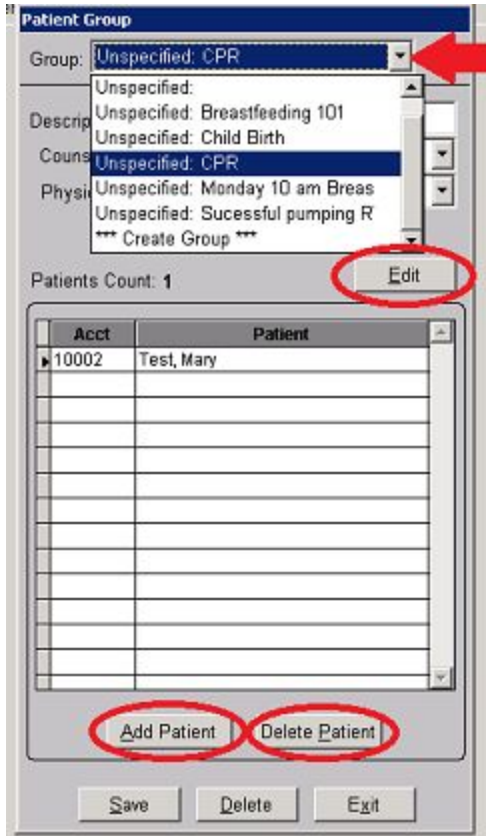
Scheduling Group Appointments

To create a group, you first must put the patients in the group in a **Table**. You can also add a patient to an existing group.

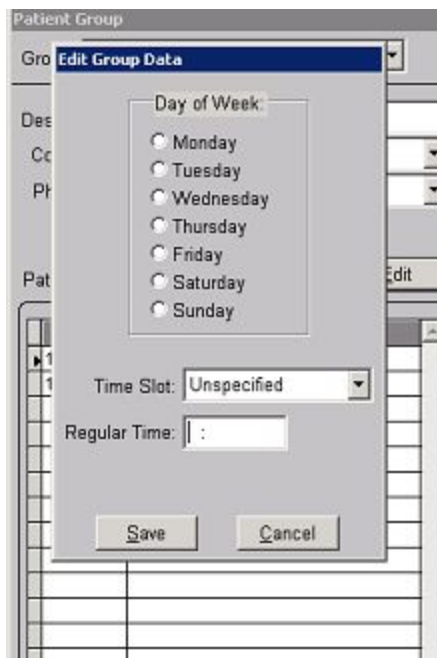
Click on Tables, Patient Tables, Patient Group



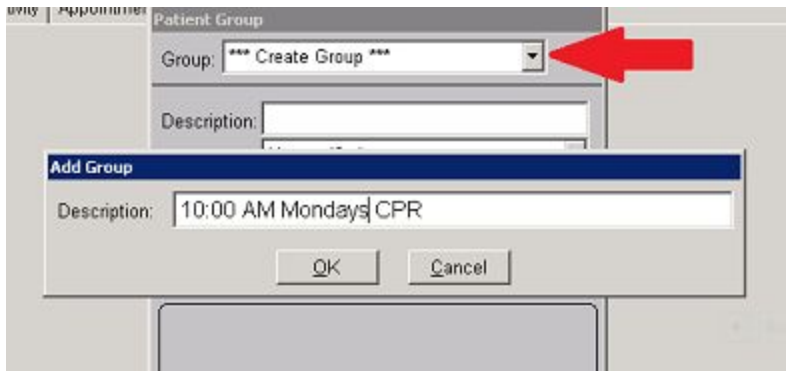
Patient Group window will appear. You can choose an existing group from the drop down box at the top. Current group patients are then listed. You can now add or delete a patient from group. Save.



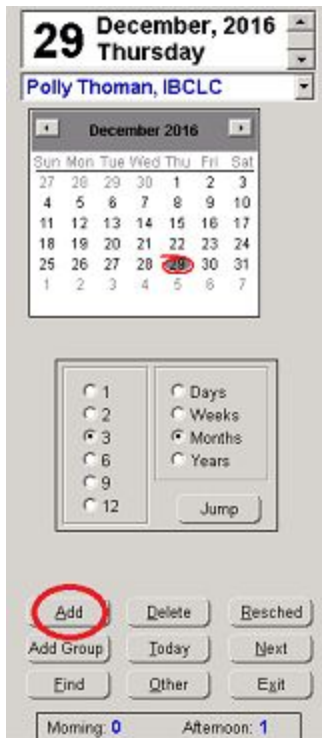
Click **Edit** button circled above to change day of week or time group meets. Save. Exit.



You can also create a new group by choosing *****Create Group***** in drop down list. Enter name of new group in Description Field. OK. Choose counselor from drop down box. You may now begin adding patients to your new group by using **Add Patient** button at bottom of screen.



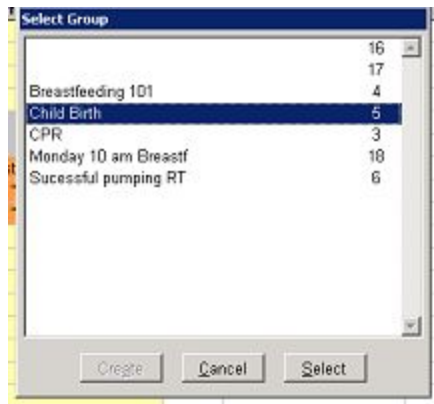
Exiting from creating/editing Group Table will bring you back to the Appointment screen. Click the **Add Group** button in lower right corner.



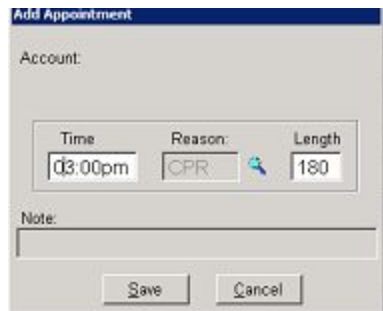
Select **Appointment** Type window will appear. Highlight correct type. Select.



Select Group window will appear. Highlight correct group. Select.



Add Appointment window will appear. Enter time and length of appointment. Use 4 digits for time and “am” or “pm” in time field. Save.



Next window will allow you to choose number of weeks group will be scheduled. OK.



System will ask if you are sure you want to schedule for multiple weeks. Click "Yes" and group appointments scheduled are confirmed.



Group appointment now appears on schedule for chosen start date and on subsequent number of weeks chosen.

Day	Week	Office
Time		Name
10:00am	OV	
10:30	OV	
11:00am	OV	
11:30	OV	
12:00pm	LUNCH	
12:30	LUNCH	
1:00pm	CDN	Test, Penny
1:30		" "
2:00pm		" "
2:30	OV	
3:00pm	CPR	CPR
3:30		" "
4:00pm		" "
4:30		" "
5:00pm		" "
5:30		" "
6:00pm	OV	

Group scheduling complete.