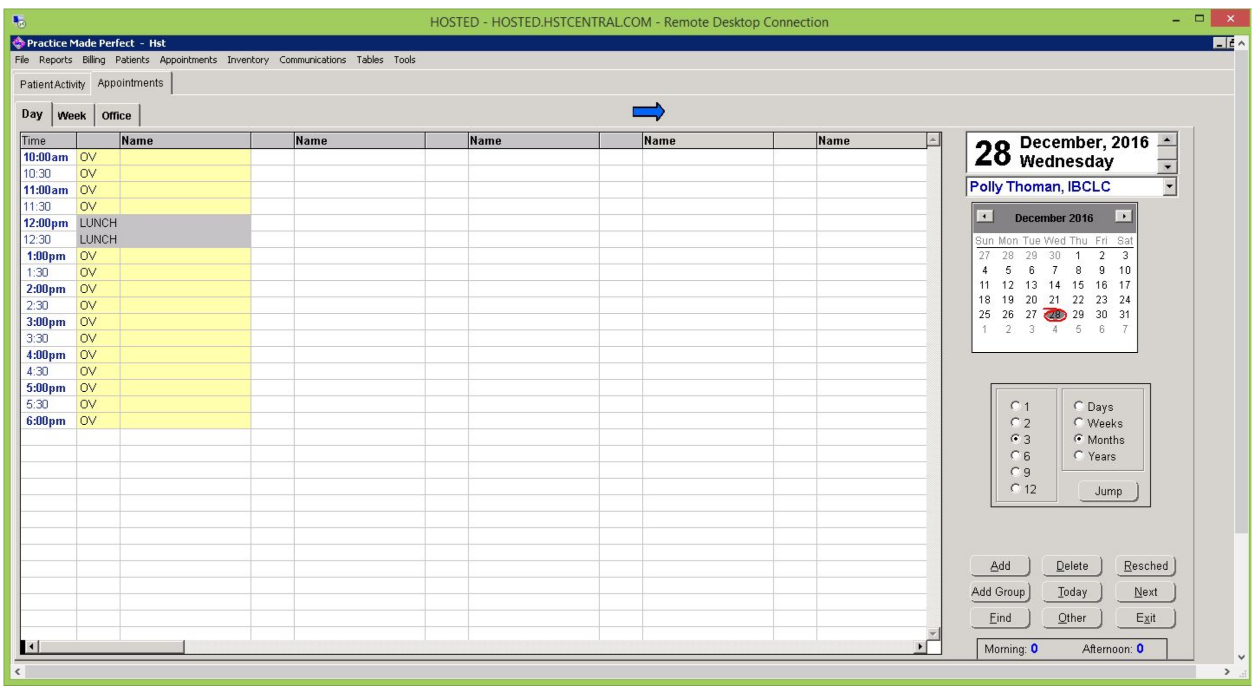
Appointments

Scheduling Appointments

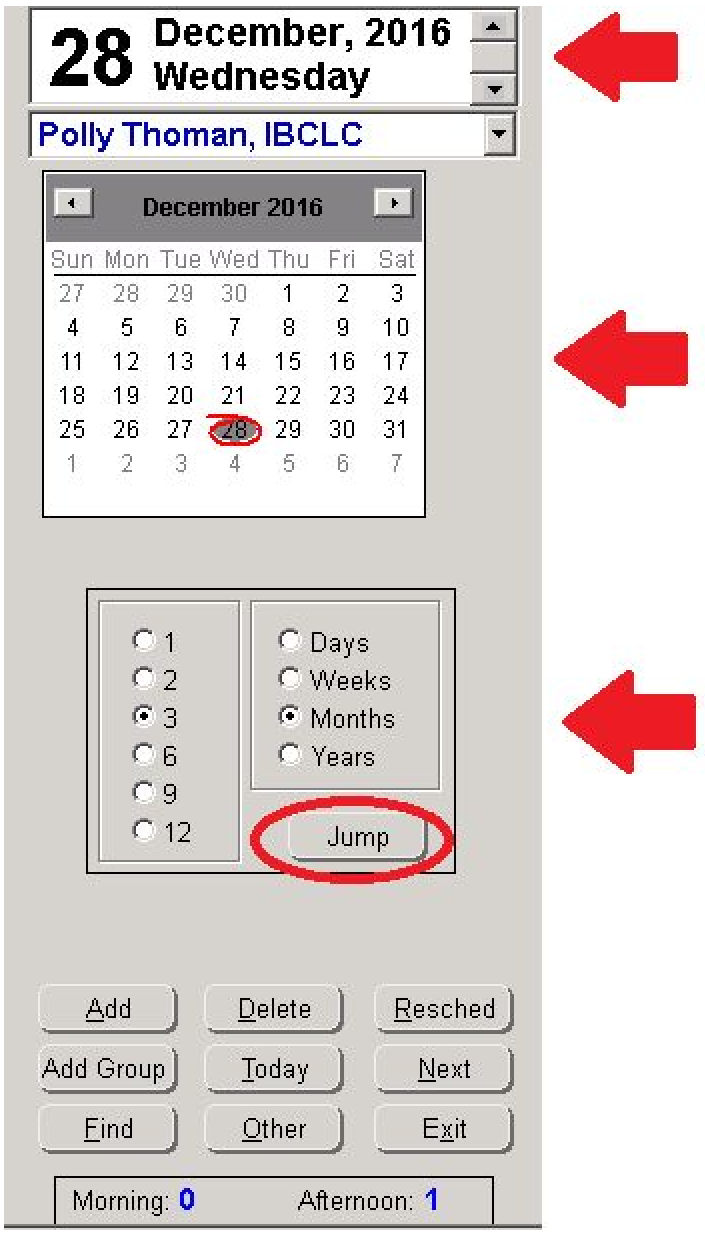
Click on Appointments tab.

This takes you to Appointment screen.



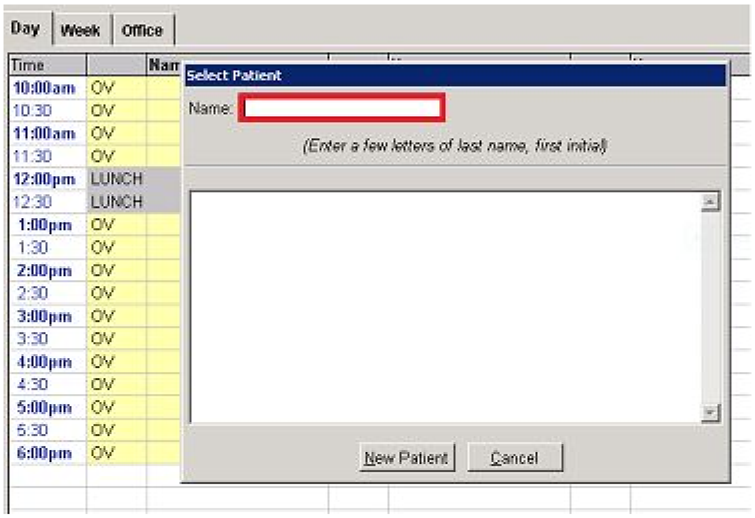
There are numerous ways to navigate through the calendar.

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

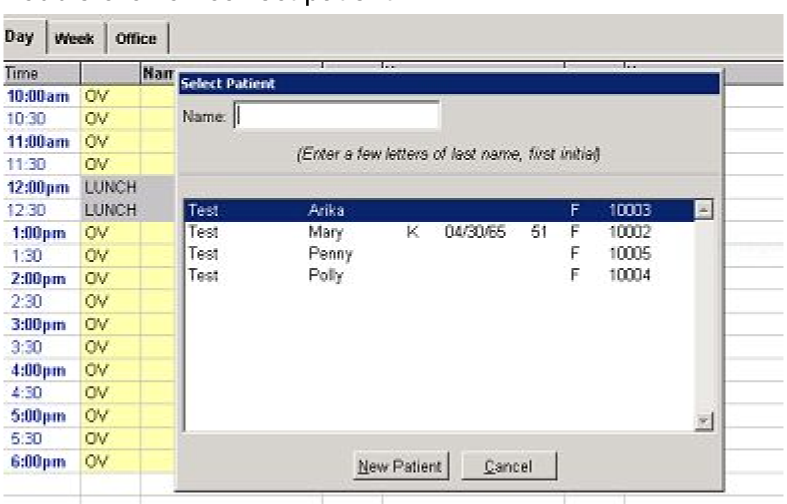


*You can see the number of morning and afternoon appointments scheduled for date chosen.

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.

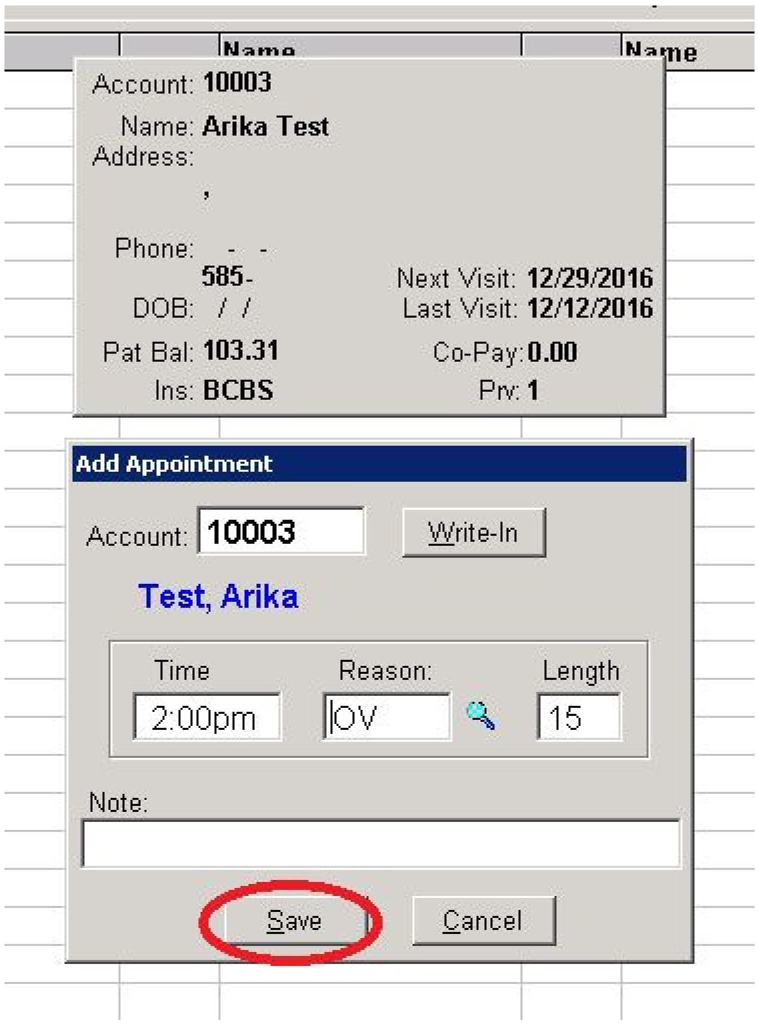


Double click on correct patient.



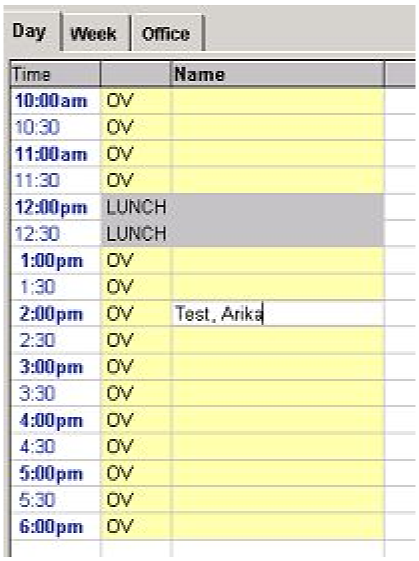
Add Appointment window will appear along with snapshot of patient record. Make sure **Reason** for visit is correct. Other options can be chosen by clicking on the search icon to the right of this field. Click **Save** to Add this patient to the schedule. Appointment scheduling is complete.

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.

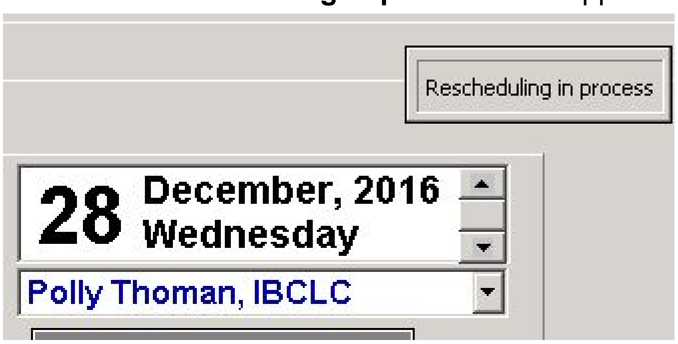


Rescheduling Appointments

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



Make sure "**Rescheduling in process**" box appears in upper right corner.



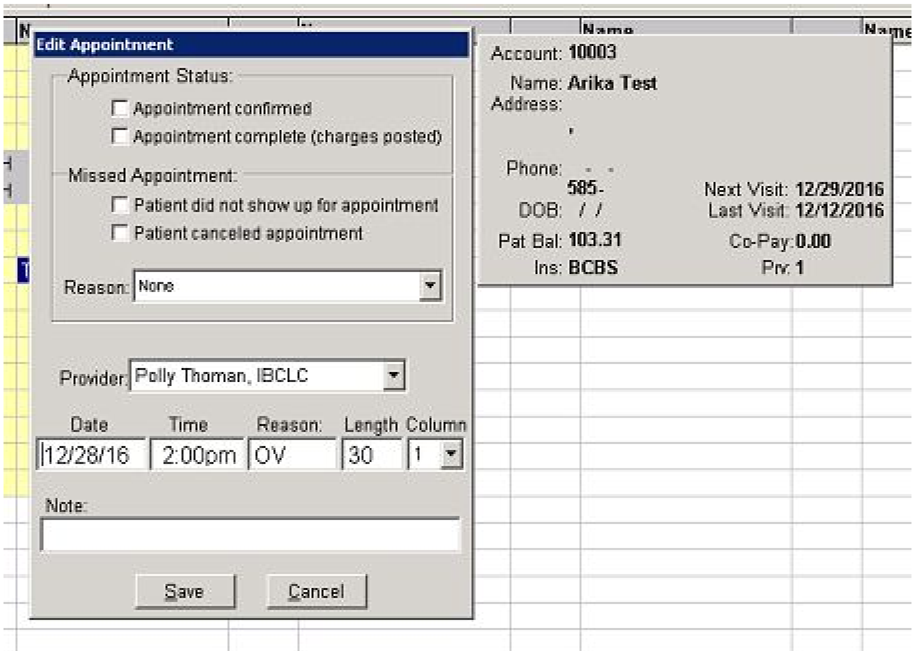
Choose new date and time and double click on that time in the schedule. Patient name will appear at the new date and time and be removed from the old date and time.

Reschedule complete.

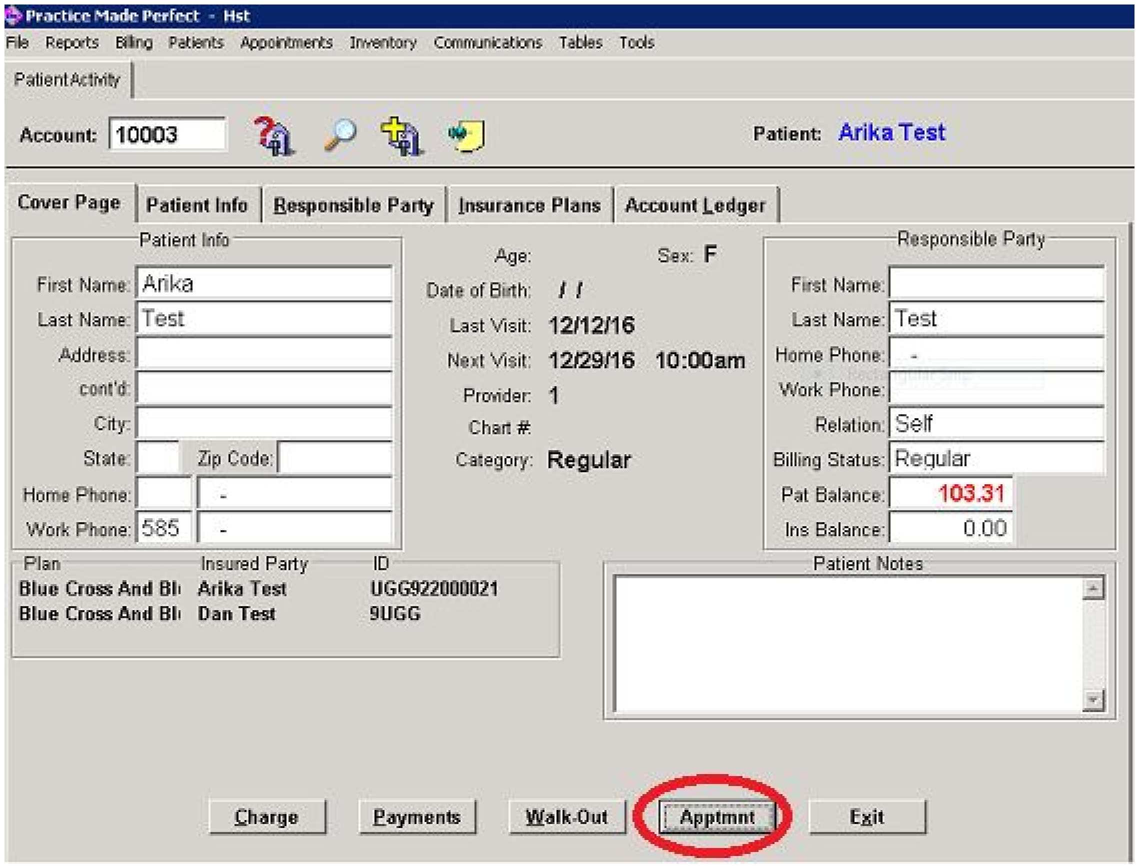
Edit Appointment

Edit appointment by double clicking on the appointment.

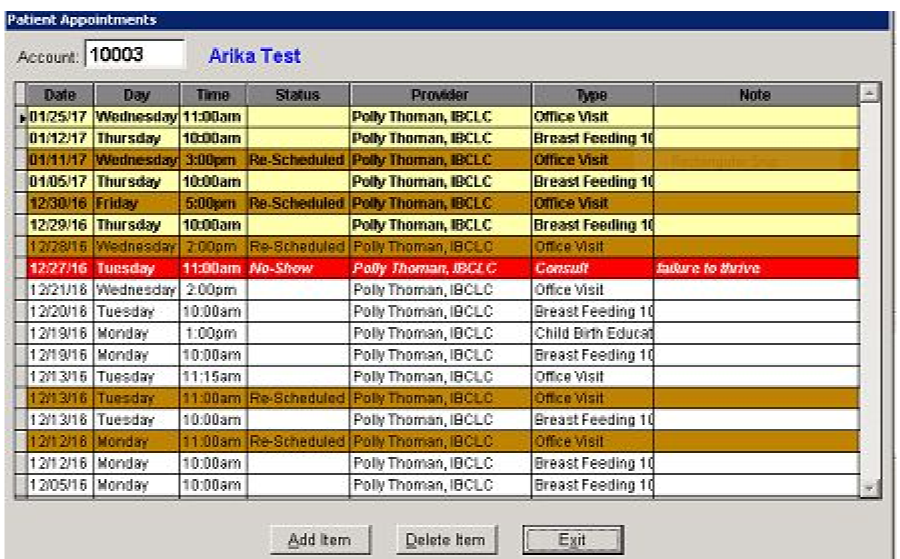
Never Delete an appointment due to cancellation or reschedule. Use Edit and Reschedule functions so office can track patient's appointment record.



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



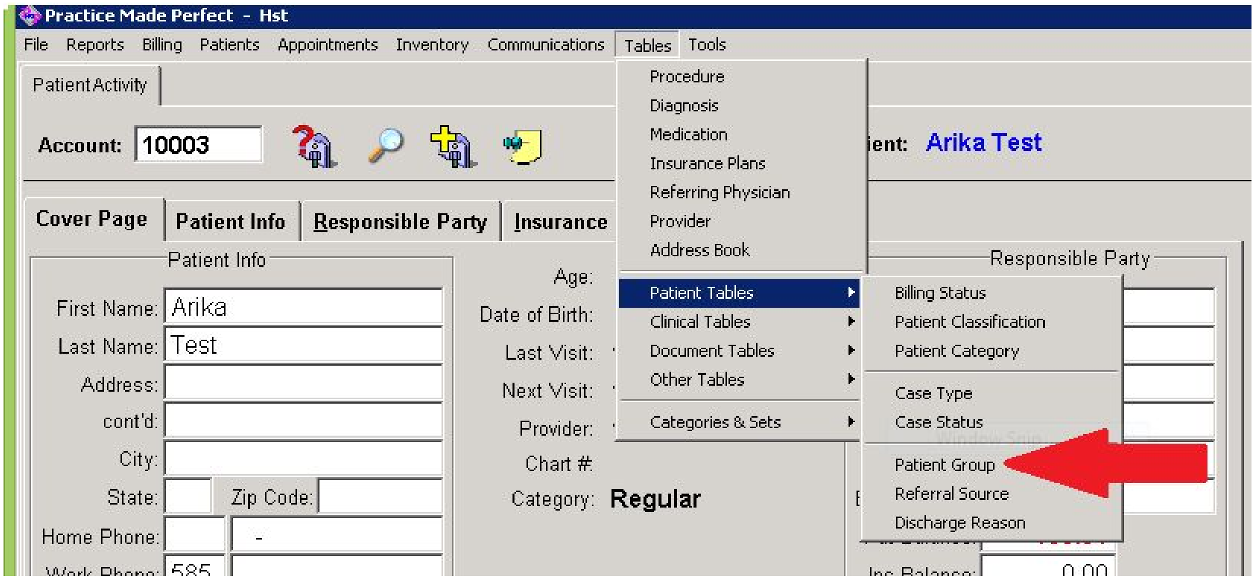
Patient Appointments window:



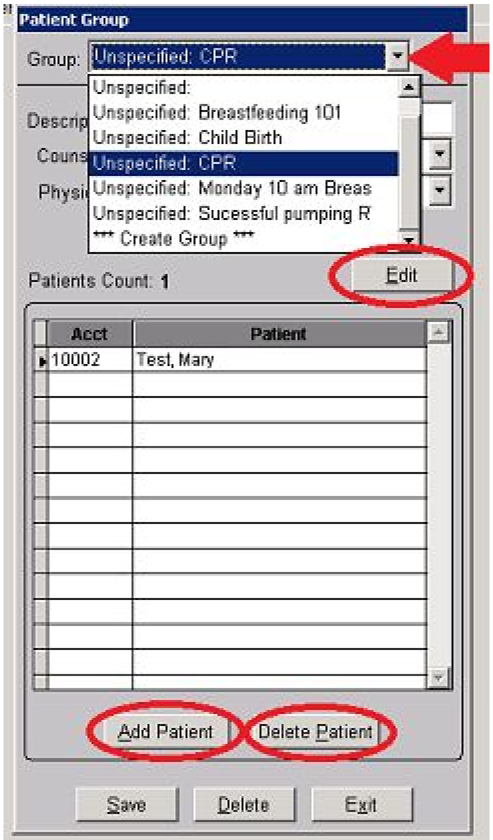
Scheduling Group Appointments

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.

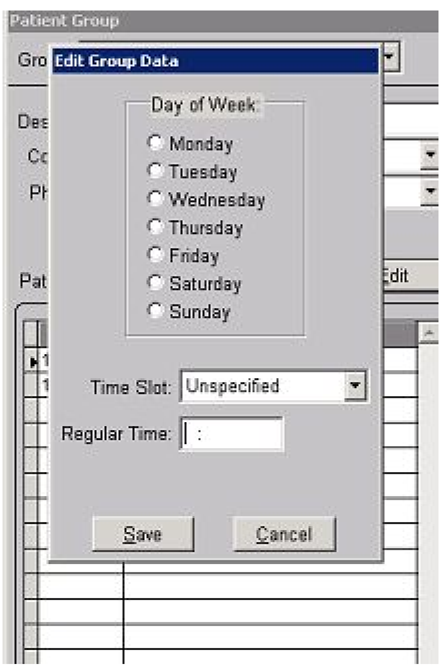
Click on Tables, Patient Tables, Patient Group



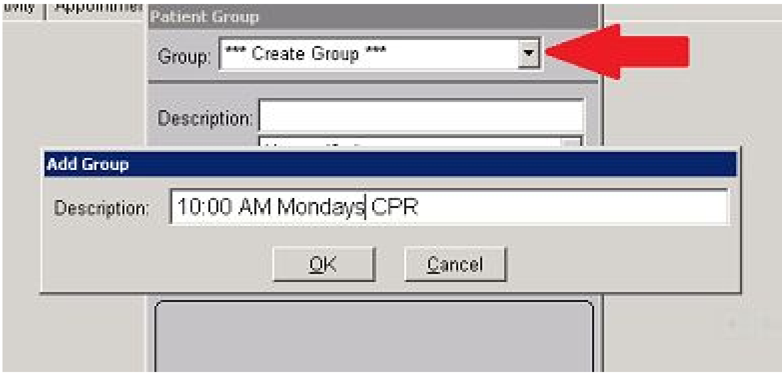
Patient Group window will appear. You can choose an existing group from the drop down box at the top. Current group patients are then listed. You can now add or delete a patient from group. Save.



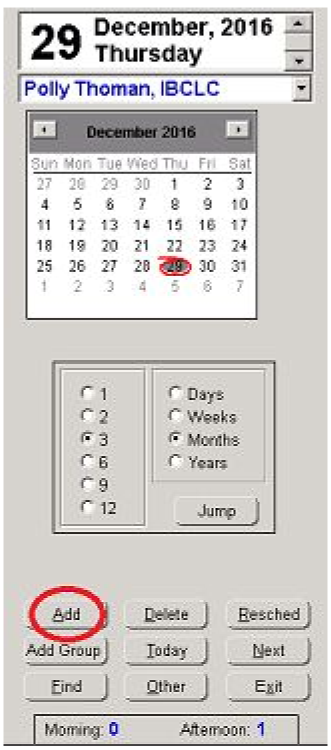
Click **Edit** button circled above to change day of week or time group meets. Save. Exit.



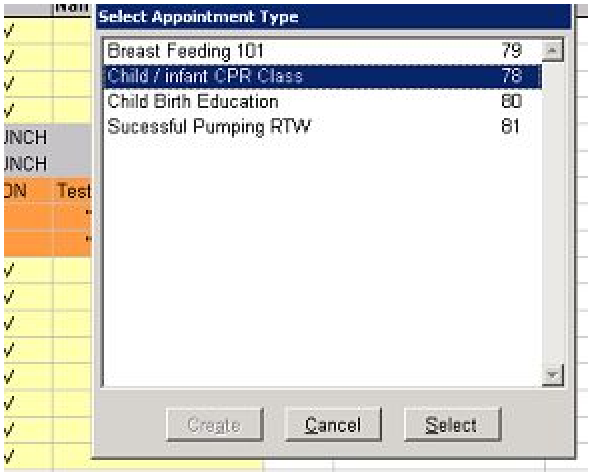
You can also create a new group by choosing *****Create Group***** in drop down list. Enter name of new group in Description Field. OK. Choose counselor from drop down box. You may now begin adding patients to your new group by using **Add Patient** button at bottom of screen.



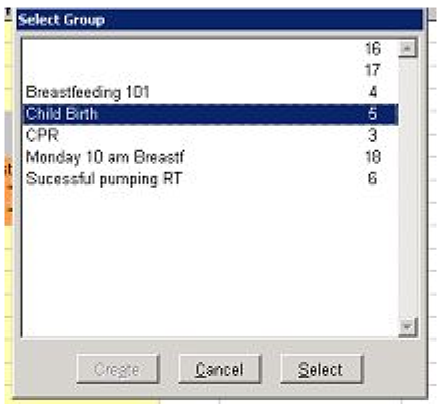
Exiting from creating/editing Group Table will bring you back to the Appointment screen. Click the **Add Group** button in lower right corner.



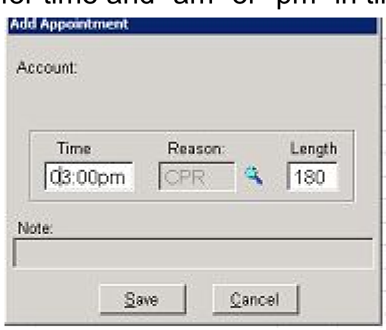
Select Appointment Type window will appear. Highlight correct type. Select.



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



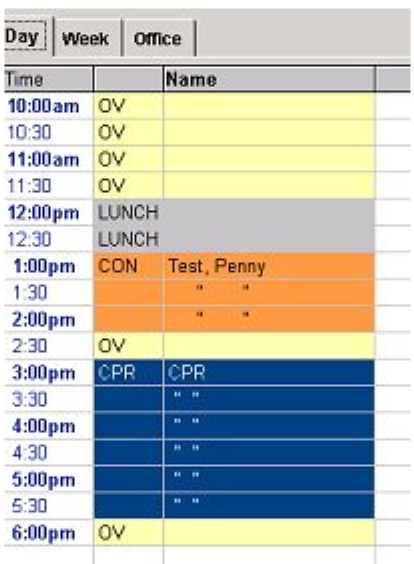
Add Appointment window will appear. Enter **time** and **length of appointment**. Use 4 digits for time and "am" or "pm" in time field. Save.



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.



Group scheduling complete.