Scheduling for Students

Reserving a Chair

1. Click on the Scheduler icon.
2. Advance to the date on which you wish to make an appointment (Use green Date, Week, Month, Weekly, or Monthly tabs).
3. Click on Chair tab. If you need to change clinics, right-mouse click, choose “Select Clinic”, and scroll down to the appropriate clinic. If you need a PM reservation, click on the **12:00p** (left bottom). To switch back to the AM, click on **1:00p** (left top).
4. Single click on a white box (open chair). Box turns green on your screen.
5. If you need less than the entire clinic time for appointments, right-mouse click and choose “Reserve Partial Session for”. Use the arrow keys to select “From” and “To” times OK.

Scheduling a Patient in the Reserved Chair

1. Click on the **Active** tab to schedule the appointment. Your reserved time will appear in beige (not grey).
2. Click anywhere in the **Active** tab to bring up the “Appointment Rolodex”.
3. Double-click on patient name from “Notepad” or in the “Rolodex” (brings up a **New Appointment** window.
4. Click on drop-down arrow next to “Appt Code” and select the estimated appointment time.
5. Click on drop-down arrow next to “Tx Discipline” and select the treatment discipline.
6. Click on drop-down arrow next to “Appt Status” and select TXPLAN. Other choices are rarely used.
7. Click on **Tx Plan...** to open Appointment Treatments.
8. Double-click on the Tx’s you will complete at this appointment to move to the “Appointment Treatments” side of the screen. Close.
9. If this appt. is for a recall, click on **Recalls...** and select the scheduled recall from the bottom of the window.
10. Make a brief note in the “Reason/Note” window so that staff can quickly see the reason for the appt. if the patient calls.
11. Click on **Accept** to close New Appointment window.
12. Position the yellow floating box where you want it and double-click to turn it white, seating your patient.
13. To later change this appt, double-click on the set appt. in the **Active** tab to reopen the New Appointment window.

Rescheduling An Appointment

In the **Active** tab, right mouse click the appointment and choose “Reschedule”.

Move floating yellow box to desired time slot. Double click to set schedule and turn it to white.

Note: When you move an appointment from one date to another, or even from one chair to another, you must go back to the original date and/or chair using Chair and remove your reservation by clicking on.

Confirming, Cancelling, Failing, Deleting an Appointment

In the **Active** tab, right mouse click on the appointment and choose **Confirm, Cancel** (6 options), **Failed** (no show), or **Delete** (your error). Enter a note in the “EHR” or in a “Contact Note” on the “Patient Card” noting cancellations and failures.

Click on **Personal Planner** tab, set date range, and click on **Appointments** to view and access appointments. Right-mouse click on patient name to go to select patient. Other tabs in the Personal Planner work similarly.