

Adding and Editing Appointments

Last Modified on 07/26/2023 1:54 pm EDT

Version 21.1

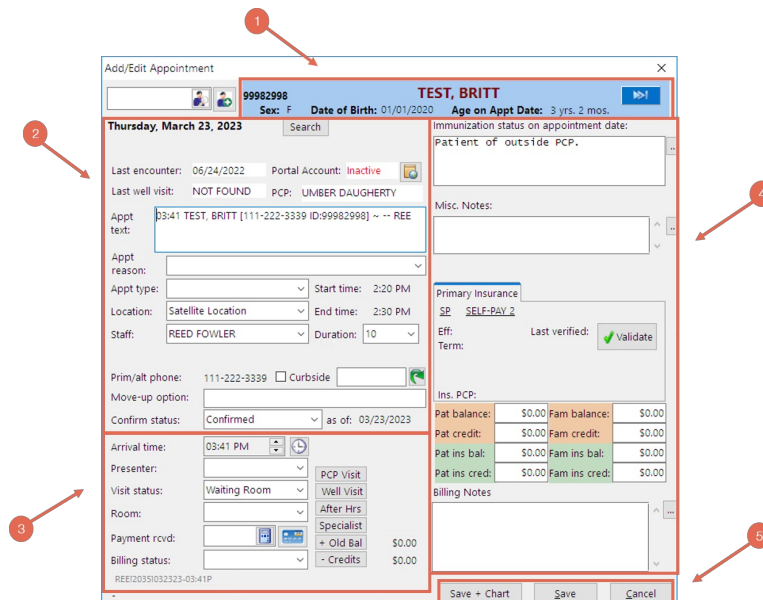


This window map article points out some of the important aspects of the window you're working with in OP but is not intended to be instructional. To learn about topics related to using this window, see the **Related Articles** section at the bottom of this page.


About Add/Edit Appointment

Path: Clinical, Practice Management or Billing tab > Schedule button > Calendar radio button > Double-click an appointment slot or click Add button

The Add/Edit Appointment window is displayed when you double-click an appointment slot or click the Add button in the Calendar Schedule window. Appointments are created or modified in this window.



Add/Edit Appointment Map

Number	Section	Description
1	Patient Info Header	The Patient Info Header displays the patient's Sex, Date of Birth, Age on Appointment Date, and Patient Number. The header is a read-only panel that displays information from the Basic Info section of the Patient Chart. Expand the Appointment Patient Banner  to view additional demographic information.
2	Appointment panel	The Appointment Information panel is where the appointment can be created or modified. Set the appointment duration, type, location, and provider in this field group. The previous visit status, Portal account status, and PCP information can also be found here.

3	Visit panel	The Visit panel follows the patient through the current visit. Payment can be applied in this panel.
4	Information panel	The Information panel contains required/recommended immunizations, Billing, and Miscellaneous notes if any. Insurance and balance information can also be found in this panel. The insurance verification PCP will be listed here and insurance can be validated in this window.
5	Save, Save + Chart, and Cancel Buttons	Save or cancel the new information entered in the Add / Edit Appointment window. Save + Chart will save the new information entered, and automatically bring up that patient's chart on the Basic Information window.

Version 21.0

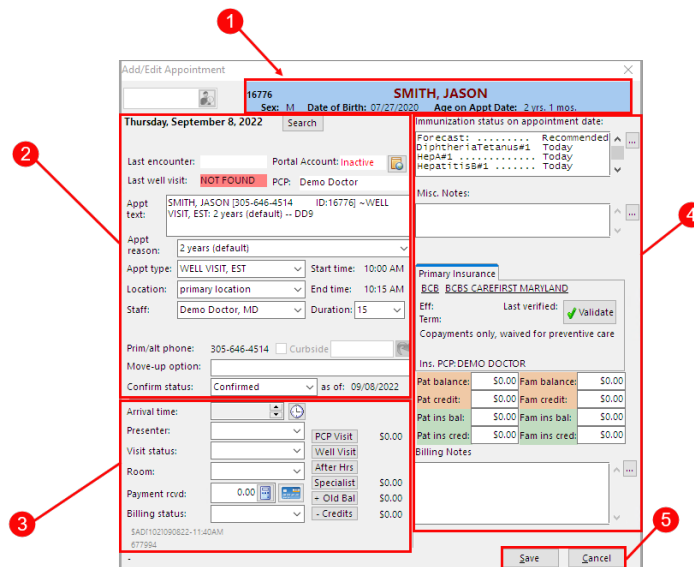


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The screenshot shows the 'Add/Edit Appointment' window for patient SMITH, JASON. Red callouts are placed as follows:

- 1:** Points to the patient header area containing the patient ID (16776), name (SMITH, JASON), sex (M), date of birth (07/27/2020), and age on appointment date (2 yrs, 1 mos).
- 2:** Points to the appointment date and time, showing 'Thursday, September 8, 2022' and a search field.
- 3:** Points to the 'Appt text' field, which contains 'SMITH, JASON [305-646-4514 ID:16776] -WELL VISIT, EST: 2 years (default) -- DD9'.
- 4:** Points to the 'Immunization status on appointment date' section, which includes a table for recommended immunizations like Tetanus, HepA#1, and HepatitisB#1.
- 5:** Points to the 'Save' and 'Cancel' buttons at the bottom right of the window.

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