

Schedule an Appointment

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Version 21.1




Our new Multi-Location Calendar updates are here! Please see the [OP 21.3 Calendar Articles](#) for an overview of the changes. Practices can configure OP to [switch to the new calendar](#) and explore its features.

Path: Clinical, Practice Management, or Billing tab > Schedule button > Calendar radio button

About

Appointments are typically scheduled for patients who have already been registered in OP. If, however, your Practice workflow allows for you to create an appointment without registering a patient first, you can enter minimal patient information while scheduling the appointment and then visit the Patient Chart to complete the patient registration. The steps to do this are included below. Remember, it is best practice to conduct a full patient search before registering them to ensure you are not creating a duplicate Patient Chart.

Schedule an Appointment for an Existing Patient

1. Access the Calendar Schedule by following the path above.
2. Confirm the correct location is selected in the upper left-hand corner of the Calendar Schedule window.
3. Double-click the time slot where the appointment should be scheduled. The **Add/Edit Appointment** window is displayed.
4. Search for and select the patient using the **Patient Search** field .
5. Select an **Appt Reason** from the drop-down menu.



Note: The selections that are displayed in the **Appt Reason** list are based upon your visibility level and the template visibility level. Well Visit templates are available to view by all users.

6. If not auto-populated based on your Appt Reason selection, select an **Appt type** from the drop-down menu.




Tip: An Appt Type is **required** in order for the appointment to be displayed in the Tracking view of the Schedule.

7. Confirm the **Location** and **Staff** fields are accurately populated.
8. Click the **Save** button at the bottom of the window, or the **Save + Chart** button to save the appointment and open the patient's chart.



Note: The **Save + Chart** button in the Add/Edit appointment window will take the user to the **Basic Info** screen of the chart.

Schedule an Appointment for a New Patient (Minimal Patient Info)

1. Access the Calendar Schedule by following the path above.
2. Confirm the correct location is selected in the upper left-hand corner of the Calendar Schedule window.
3. Double-click the time slot where the appointment should be scheduled. The **Add/Edit Appointment** window is displayed.
4. Conduct a full patient search to ensure the patient does not already have a chart established in your system.
5. Click the **Create a New Patient with Appointment** button .
6. Complete ALL fields highlighted in yellow: **Last / Suffix, First / Middle, Birth date, Sex, Prim/alt phone** (these are the minimum required fields, and your practice may have more fields that are required).

7. Proceed with completing the appointment details, and click **Save**, or the **Save + Chart** button to save the appointment and open the patient's chart.



Important: Additional required Demographic fields, Family Contacts, and Insurance information are all needed to create a reliable Patient Chart. Navigate to the chart for the new patient and complete this information as soon as possible.


Version 21.0

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4. Search for and select the patient using the **Patient Search** field .
5. Select an **Appt Reason** from the drop-down menu.



Note: The selections that are displayed in the **Appt Reason** list are based upon your visibility level and the template visibility level. Well Visit templates are available to view by all users.


6. If not auto-populated based on your Appt Reason selection, select an **Appt type** from the drop-down menu.



Tip: An Appt Type is **required** in order for the appointment to be displayed in the Tracking view of the Schedule.

7. Confirm the **Location** and **Staff** fields are accurately populated.
8. Click the **Save** button at the bottom of the window.

Schedule an Appointment for a New Patient (Minimal Patient Info)

1. Access the Calendar Schedule by following the path above.
2. Confirm the correct location is selected in the upper left-hand corner of the Calendar Schedule window.
3. Double-click the time slot where the appointment should be scheduled. The **Add/Edit Appointment** window is displayed.
4. Conduct a full patient search to ensure the patient does not already have a chart established in your system.
5. Click the **Create a New Patient with Appointment** button .
6. Complete the field highlighted in yellow: **Last / Suffix, First / Middle, Birth date, Sex, Prim/alt phone**.
7. Proceed with completing the appointment details, and click **Save**.



Important: Additional required Demographic fields, Family Contacts, and Insurance information are all needed to create a reliable Patient Chart. Navigate to the chart for the new patient and complete this information as soon as possible.