

# How to Search for an Appointment

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Version 14.19



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.

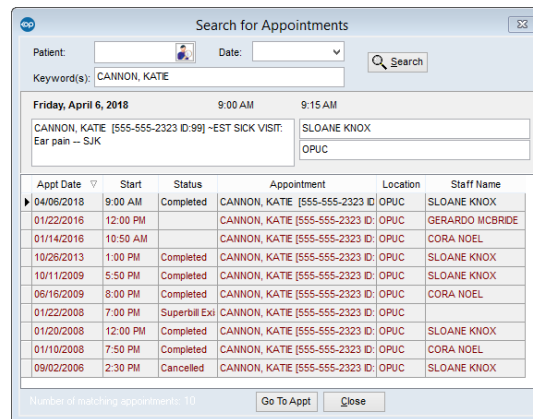
**Path: Clinical, Practice Management, or Billing tab > Schedule button > Calendar radio button**

## Overview

This page will instruct you on how to search for an appointment.

## Search For an Appointment

1. Click the **Search** button located beneath the small calendar. The Search for Appointments window will open.



Appt Date	Start	Status	Appointment	Location	Staff Name
04/06/2018	9:00 AM	Completed	CANNON, KATE [555-555-2323 ID:99] -EST SICK VISIT: Ear pain -- SJK	SLOANE KNOX	OPUC
01/22/2018	12:00 PM		CANNON, KATE [555-555-2323 ID:99]	OPUC	SLOANE KNOX
01/14/2016	10:50 AM		CANNON, KATE [555-555-2323 ID:99]	OPUC	CORA NOEL
10/26/2013	1:00 PM	Completed	CANNON, KATE [555-555-2323 ID:99]	OPUC	SLOANE KNOX
10/11/2009	5:50 PM	Completed	CANNON, KATE [555-555-2323 ID:99]	OPUC	SLOANE KNOX
06/16/2009	8:00 PM	Completed	CANNON, KATE [555-555-2323 ID:99]	OPUC	CORA NOEL
01/22/2008	7:00 PM	Superbill Excl	CANNON, KATE [555-555-2323 ID:99]	OPUC	
01/20/2008	12:00 PM	Completed	CANNON, KATE [555-555-2323 ID:99]	OPUC	SLOANE KNOX
01/10/2008	7:50 PM	Completed	CANNON, KATE [555-555-2323 ID:99]	OPUC	CORA NOEL
09/02/2006	2:30 PM	Cancelled	CANNON, KATE [555-555-2323 ID:99]	OPUC	SLOANE KNOX

2. There are three parameters you can use to search for appointments:

- **Patient:** Search for and select the patient whose appointments you would like to view. This field can be used alone without a date or keyword.
- **Date:** Enter a date to view all of the appointments schedule for that day. This field can be used alone without a patient or keyword.
- **Keyword(s):** Enter a keyword to view all patients whose appointments contain that word. This field can be used alone without a patient or date.

**Example:** To locate all appointments made with an appointment reason of Sore Throat on 4/27/2018:



1. Enter **4/27/2018** in the date field.
2. Enter **Sore Throat** in the Keyword(s) field.
3. Click the **Search** button.

3. The appointment(s) matching your search parameters will be listed. As you click through the appointments, the details will show and will include:

- Appt Date
- Start (time of appointment)
- Status: The Billing status of the appointment will be displayed here. If there is not a Billing Status yet, this field will be blank.

- Appointment: The details of the appointment will be displayed here.
- Location: The location for which the appointment was scheduled.
- Staff Name: The staff/provider with whom the appointment is scheduled will be listed here.

**Note:** If the appointment was not assigned to a provider, this field will be blank. If this field is blank, and you click Go To Appt, you will *not* see the appointment on the scheduled unless the Not Assigned checkbox is selected on the Calendar.



Show columns:

Not assigned

Out of office

4. Click the **Go To Appt** button to be taken to a particular appointment's schedule day.


Version 14.10

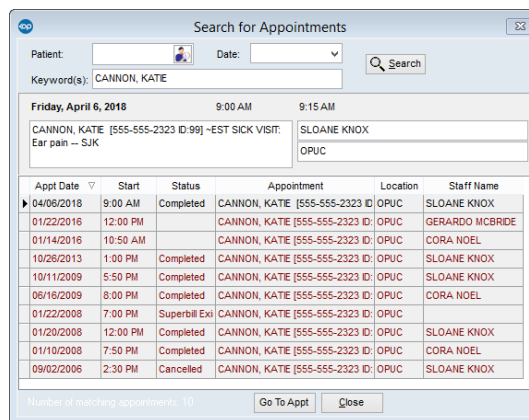
**Path: Smart Toolbar > Schedule button > Calendar tab**

## Overview

This page will instruct you on how to search for an appointment.

## Search For an Appointment

1. Click the **Search For Keyword** button  located beneath the small calendar. The Search for Appointments window will open.



Appt Date	Start	Status	Appointment	Location	Staff Name
04/06/2018	9:00 AM	Completed	CANNON, KATE [555-555-2323 ID]	OPUC	SLOANE KNOX
01/22/2016	12:00 PM		CANNON, KATE [555-555-2323 ID]	OPUC	GERARDO MCBRIDE
01/14/2016	10:50 AM		CANNON, KATE [555-555-2323 ID]	OPUC	CORA NOEL
10/26/2013	1:00 PM	Completed	CANNON, KATE [555-555-2323 ID]	OPUC	SLOANE KNOX
10/11/2009	5:50 PM	Completed	CANNON, KATE [555-555-2323 ID]	OPUC	SLOANE KNOX
06/16/2009	8:00 PM	Completed	CANNON, KATE [555-555-2323 ID]	OPUC	CORA NOEL
01/22/2008	7:00 PM	Superbill Exi	CANNON, KATE [555-555-2323 ID]	OPUC	
01/20/2008	12:00 PM	Completed	CANNON, KATE [555-555-2323 ID]	OPUC	SLOANE KNOX
01/19/2008	7:50 PM	Completed	CANNON, KATE [555-555-2323 ID]	OPUC	CORA NOEL
09/02/2006	2:30 PM	Cancelled	CANNON, KATE [555-555-2323 ID]	OPUC	SLOANE KNOX

Number of matching appointments: 10

Go To Appt Close

2. There are three parameters you can use to search for appointments:

- **Patient:** Search for and select the patient whose appointments you would like to view. This field can be used alone without a date or keyword.
- **Date:** Enter a date to view all of the appointments schedule for that day. This field can be used alone without a patient or keyword.
- **Keyword(s):** Enter a keyword to view all patients whose appointments contain that word. This field can be used alone without a patient or date.

**Example:** To locate all appointments made with an appointment reason of Sore Throat on 4/27/2018:



1. Enter 4/27/2018 in the date field.
2. Enter Sore Throat in the Keyword(s) field.
3. Click the **Search** button.


3. The appointment(s) matching your search parameters will be listed. As you click through the appointments, the details will

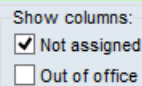
show and will include:

- Appt Date
- Start (time of appointment)
- Status: The Billing status of the appointment will be shown here.

 **Note:** If there is not yet a Billing Status, this field will be blank.

- Appointment: The details of the appointment will show here.
- Location: The location for which the appointment was scheduled.
- Staff Name: The staff/provider with whom the appointment is scheduled will be listed here.

 **Note:** If the appointment was not assigned to a provider, this field will be blank. If this field is blank, and you click **Go To Appt**, you will not see the appointment on the scheduled unless the **Not Assigned** checkbox is selected on the Calendar.



Show columns:  
 Not assigned  
 Out of office

4. Click the **Go To Appt** button to be taken to a particular appointment's schedule day.