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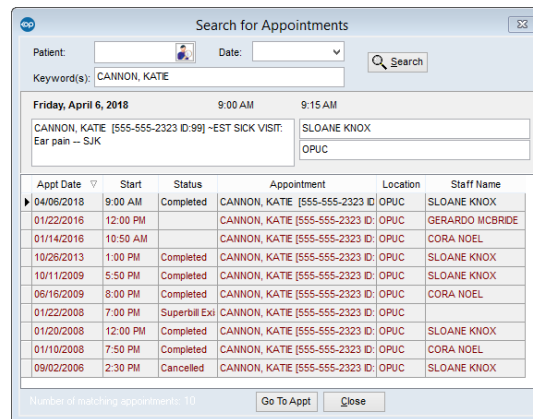
Path: Clinical, Practice Management, or Billing tab > Schedule button > Calendar radio button

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.

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.
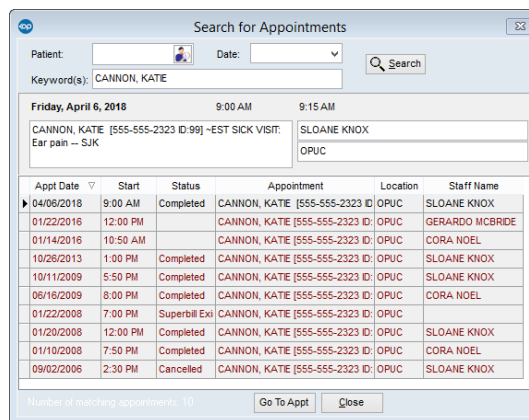
Version 14.10

| **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.

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
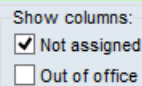
show and will include:

- 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.