

Appointment Move-Up Option

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Version 14.10



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

The Move-Up option allows you to make a note in an appointment scheduled on a future date regarding a rescheduling preference and then also access a list of all appointments that have a preference note for the purpose of rescheduling or moving up appointments.

Here's How

Your browser does not support HTML5 video.

Add a Move-Up Note to a Scheduled Appointment

1. From the Calendar, select and double-click an appointment to open it. If you're in the process of scheduling the appointment and already have the Appointment window open, proceed to the next step.
2. Click into the **Move up option** field and type the details of the rescheduling preference.
3. Click **Save** to save the note in the appointment.

Access the Patient Rescheduling List

1. From the Calendar view of the Schedule, click the **Find Move-Up** button. The Patient Rescheduling List is displayed.
2. Review the list of appointments with a Move-Up option indicated, and double-click the appointment you'll be rescheduling.
3. **Reschedule/move** the appointment as you normally would.
4. Double-click the appointment to open the Add/Edit Appointment window.
5. Remove the **Move-up option field** text by highlighting the text and pressing backspace on your keyboard.
6. Click **Save** to save the appointment. The appointment is removed from the Patient Rescheduling List.

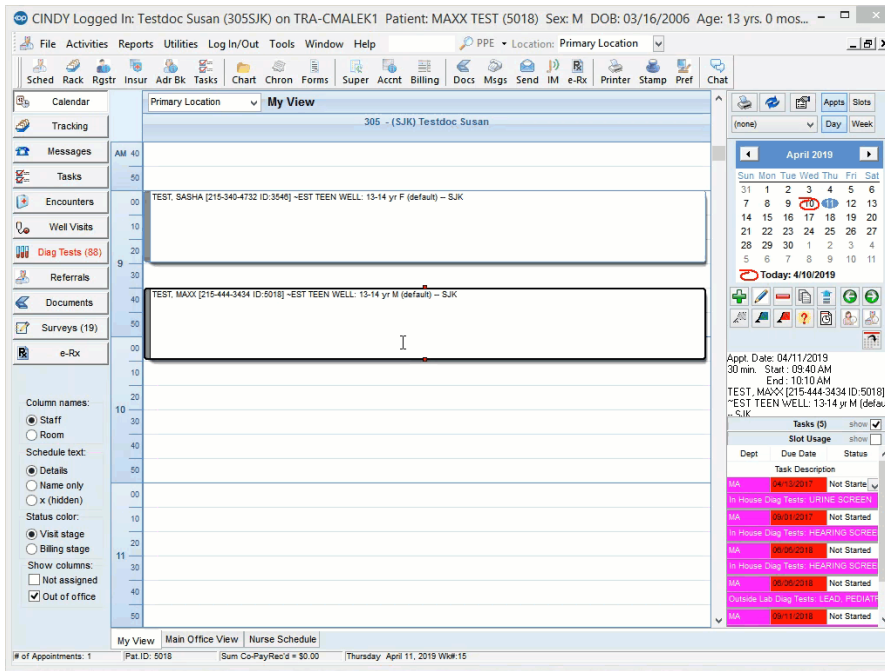
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Overview

The Move Up option found in the Add/Edit appointment window is used to document a schedule change request for a selected appointment.

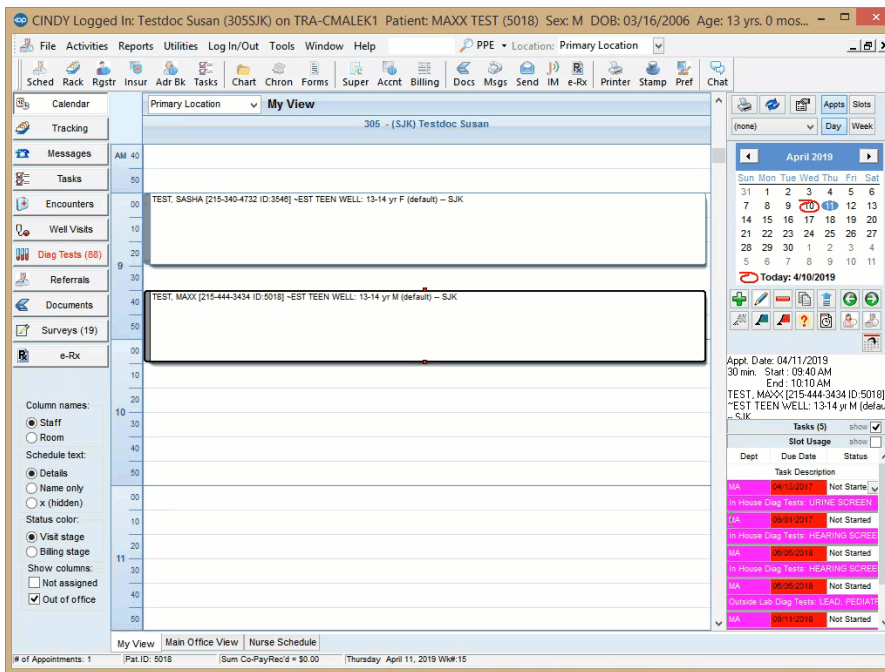
1. From the Calendar select an appointment.
2. Open the **Add/Edit Appointment** window by double-clicking or selecting the **Edit** button.
3. Click into the **Move up option** field and type the appointment request.

The video below provides an example for adding the appointment request to the Add/Edit Appointment window.



The screenshot shows the 'My View' appointment schedule for patient MAXX TEST (5018). The interface includes a menu bar, a toolbar, and a sidebar with navigation options like Calendar, Tracking, Messages, Tasks, Encounters, Well Visits, and e-Rx. The main area displays a grid of appointments for the date 04/11/2019. Two appointments are visible: 'TEST, SASHA [215-340-4732 ID:3545] -EST TEEN WELL: 13-14 yr F (default) - SJK' and 'TEST, MAXX [215-444-3434 ID:5018] -EST TEEN WELL: 13-14 yr M (default) - SJK'. The right sidebar shows a calendar for April 2019, a task list, and a slot usage table.

The next video below provides an example for running a report.



This screenshot is identical to the one above, showing the 'My View' appointment schedule for patient MAXX TEST (5018) on 04/11/2019. It displays the same two appointments and interface elements.

Note: The Move up option field is a free-text field that allows you to indicate any preference for the selected appointment. For example, request an end of day appointment. The request is added to the Patient Rescheduling Lists. The report lists all patients with a Move Up option for future appointments, will not list patients with Move Up request for the current day. For information on the Patient Rescheduling List click [here](#).