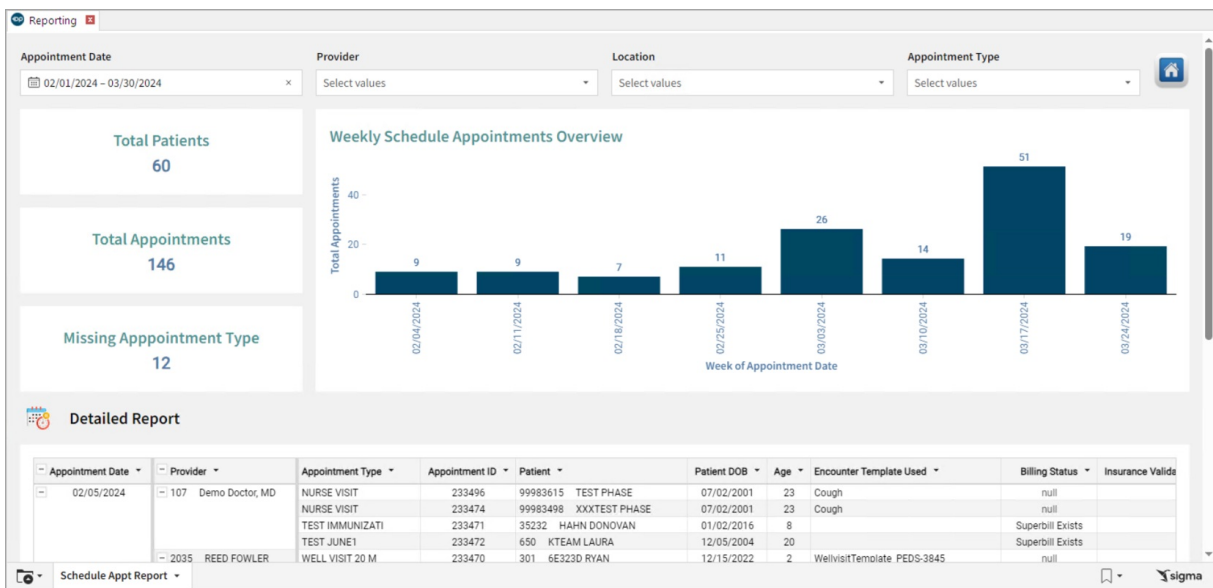# Scheduling Reports: Scheduled Appointments

Last Modified on 06/26/2024 4:33 pm EDT

Version 21.3

When to Use this Report

Use this report when you want to see a total count of appointments for your scheduled providers for a specified time frame. This report also can be used to see how many appointments were No Show or Cancelled appointments for the day, week, month, or year.

About Scheduled Appointments

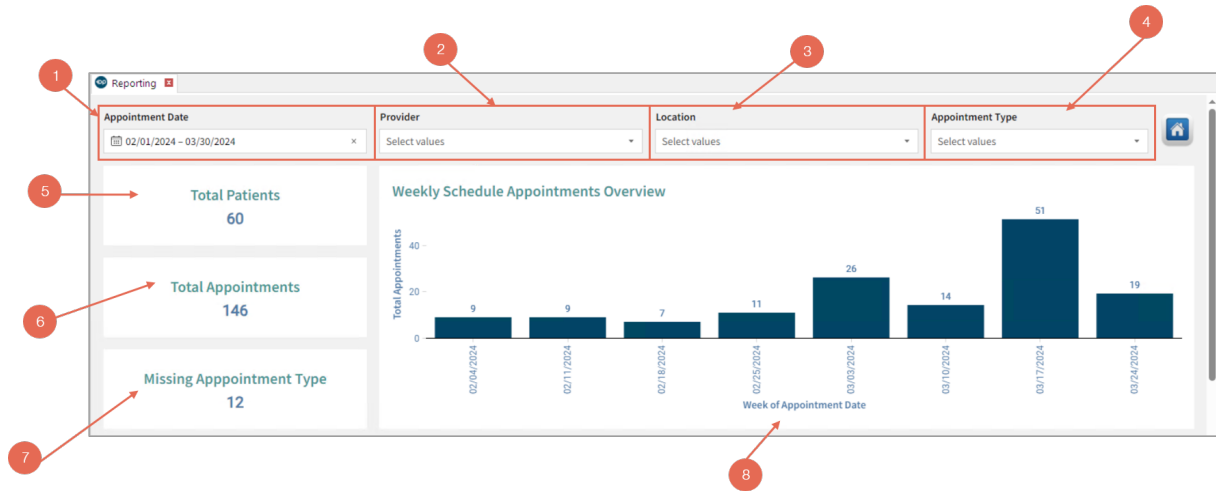> **Path: Tools > Reporting > Scheduling Reports > Scheduled Appointments**

Scheduling Reports: Scheduled Appointments Map

Hover over each of the Summary Tiles, to see specific data. For instructions on how to drill down and expand that information from the Summary Tiles, please see the **Drill Down** section of the Data Element Tutorial.

> 📌 **Note**: All columns in the Detailed Report section will show by default. To hide columns, see the **Visualization** section of the Maximized Elements article.

Filters and Summary Tiles

Number	Section	Description
1	Appointment Date	Use this filter to select the date(s) you wish to search based on the date of the appointment. See the **Dates** section of the Filter Tutorial article for the different selections.
2	Provider	Use this filter to select a provider(s) associated appointments.
3	Location	Use this filter to select the Location(s) of the appointments.
4	Appointment Types	Use this filter to select the Appointment Types you wish to pull in this report.
5	Total Patients	The **Total Patients** tile shows the total number of patients pulled in this report based on the selected parameters. This is a distinct patient count pulled from the Patient column.
6	Total Appointments	The **Total Appointments** tile shows the totals from the Appointment ID column.
7	Missing Appointment Type	The **Missing Appointment Type** tile shows the total of blanks from the Appointment Type column, or the number of Appointments with a blank Appointment Type.
8	Week of Appointment Date	The **Week of Appointment Date** graph shows the total number of appointments for each week in the selected date range.

Detailed Report

Detailed Report

Appointment Date	Provider	Appointment Type	Appointment ID	Patient	Patient DOB	Age	Encounter Template Used	Billing Status	Insurance Valida
02/05/2024	107 Demo Doctor, MD	NURSE VISIT	233496	99983615 TEST PHASE	07/02/2001	23	Cough	null	
		NURSE VISIT	233474	99983498 XXXTEST PHASE	07/02/2001	23	Cough	null	
		TEST IMMUNIZATI	233471	35232 HAHN DONOVAN	01/02/2016	8		Superbill Exists	
		TEST JUNE1	233472	650 KTEAM LAURA	12/05/2004	20		Superbill Exists	
	2035 REED FOWLER	WELL VISIT 20 M	233470	301 6E323D RYAN	12/15/2022	2	WellvisitTemplate_PEDS-3845	null	
02/08/2024	2035 REED FOWLER	EST WELL CHK	233479	99982998 TEST BRITT	01/01/2020	4	4 years (default)	null	
02/09/2024	107 Demo Doctor, MD	TEST CONSULTATI	233483	7452 Test Friday	09/14/1980	44	SINUSITIS	null	
		EST TEEN WELL	233485	99983033 JOHNSON EMILY	12/16/2010	14	15-17 yr F (default)	null	
		WELL VISIT 10 M	233484	99983500 TEST ATLAS	05/07/2008	16	WellvisitTemplate_PEDS-3845	null	
02/12/2024	107 Demo Doctor, MD	TEST WELL CHK	233487	99983383 TESTONE EMILY	12/16/2020	4	12 month (default)	null	
02/14/2024	107 Demo Doctor, MD	SQA WELL VISIT	233514	99983615 TEST PHASE	07/02/2001	23	WARTS	null	
02/15/2024	107 Demo Doctor, MD	TEST BH WH	233510	99983625 ALT ALT	02/15/2000	24	{Special_Characters_Peds-3911}	null	
02/16/2024	107 Demo Doctor, MD	NURSE VISIT	233497	99983615 TEST PHASE	07/02/2001	23	Cough	null	SELF
		NURSE VISIT	233491	99983605 SKAR TEST	02/08/2000	24	Cough	null	
		NURSE VISIT	233494	99983498 XXXTEST PHASE	07/02/2001	23	Cough	null	
		NURSE VISIT	233492	99983174 XXXTEST TRISTIN	06/05/2023	1	Cough	null	
		NURSE VISIT	233493	99983614 TEST TRISTIN	06/05/2023	1	Cough	null	
	2035 REED FOWLER	EST TEEN WELL	233512	99983033 JOHNSON EMILY	12/16/2010	14	15-17 yr F (default)	null	
02/20/2024	107 Demo Doctor, MD	EST TEEN WELL	233498	7741 XXXTEST CAREPLAN	01/01/1997	27	18-21 yr M (default)	null	
		EST TEEN WELL	233519	99983033 JOHNSON EMILY	12/16/2010	14	13-14 yr F (default)	Cancelled	
		EST TEEN WELL	233502	99983616 TEST CAREPLAN	01/01/1997	27	18-21 yr M (default)	null	
	2035 REED FOWLER	EST SICK VISIT	233518	99983631 SIB ONE	02/20/2000	24	Cold symptoms	null	
02/21/2024	107 Demo Doctor, MD	EST TEEN WELL	233503	8520 TEST VAN	01/01/1997	27	18-21 yr F (Default)	null	
	2035 REED FOWLER	EST TEEN WELL	233504	99983073 XXXTEST CLINICAL	01/01/2000	24	18-21 yr F (Default)	null	
		EST TEEN WELL	233508	99983619 TEST CLINICAL	01/01/2000	24	18-21 yr F (Default)	null	
02/29/2024	2035 REED FOWLER	EST TEEN WELL	233515	99983033 JOHNSON EMILY	12/16/2010	14	13-14 yr F (default)	null	

Detailed Report

Patient DOB	Age	Encounter Template Used	Billing Status	Insurance Validation	Validation Date	Staff Name	Location	Confirm Status	Confirm Date
07/02/2001	23	Cough	null		null	2035 REED FOWLER	Anon Peds	Confirmed	02/08/2024 09:33:04 AM
07/02/2001	23	Cough	null		null	2035 REED FOWLER	Anon Peds	Confirmed	02/08/2024 09:33:04 AM
01/02/2016	8		Superbill Exists		null	107 Demo Doctor, MD	Main Office - Horsham Pediatrics	Confirmed	02/05/2024 01:34:00 PM
12/05/2004	20		Superbill Exists		null	107 Demo Doctor, MD	Main Office - Horsham Pediatrics	Confirmed	02/05/2024 01:49:26 PM
12/15/2022	2	WellvisitTemplate_PEDS-3845	null		null	2035 REED FOWLER	Main Office	Confirmed	02/05/2024 03:30:39 AM
01/01/2020	4	4 years (default)	null		null	102 Administrative User	Main Office	Confirmed	02/08/2024 02:25:03 PM
09/14/1980	44	SINUSITIS	null		null	2035 REED FOWLER	Anon Peds	Confirmed	02/09/2024 07:36:50 PM
12/16/2010	14	15-17 yr F (default)	null		null	102 Administrative User	Main Office - Horsham Pediatrics	Confirmed	02/09/2024 11:10:56 AM
05/07/2008	16	WellvisitTemplate_PEDS-3845	null		null	2035 REED FOWLER	Main Office	Confirmed	02/09/2024 08:06:42 PM
12/16/2020	4	12 month (default)	null		null	102 Administrative User	Main Office - Horsham Pediatrics	Confirmed	02/12/2024 08:41:42 AM
07/02/2001	23	WARTS	null		null	2035 REED FOWLER	Main Office	Unconfirmed	02/16/2024 04:37:12 AM
02/15/2000	24	{Special_Characters_Peds-3911}	null		null	2035 REED FOWLER	Anon Peds	Confirmed	02/15/2024 03:54:05 AM
07/02/2001	23	Cough	null	SELF	02/16/2024	2035 REED FOWLER	Main Office - Horsham Pediatrics	Attempt, no answer	02/16/2024 12:02:01 AM
02/08/2000	24	Cough	null		null	2035 REED FOWLER	Main Office - Horsham Pediatrics	Attempt, no answer	02/15/2024 11:32:01 PM
07/02/2001	23	Cough	null		null	2035 REED FOWLER	Main Office - Horsham Pediatrics	Attempt, no answer	02/16/2024 12:02:01 AM
06/05/2023	1	Cough	null		null	2035 REED FOWLER	Main Office - Horsham Pediatrics	Unconfirmed	02/13/2024 02:43:37 PM
06/05/2023	1	Cough	null		null	2035 REED FOWLER	Main Office - Horsham Pediatrics	Attempt, no answer	02/15/2024 11:32:01 PM
12/16/2010	14	15-17 yr F (default)	null		null	2035 REED FOWLER	Main Office - Horsham Pediatrics	Awaiting confirmat...	02/16/2024 12:23:30 PM
01/01/1997	27	18-21 yr M (default)	null		null	2035 REED FOWLER	Main Office - Horsham Pediatrics	Unconfirmed	02/13/2024 03:06:32 PM
12/16/2010	14	13-14 yr F (default)	Cancelled		null	2035 REED FOWLER	Anon Peds	Confirmed	02/20/2024 02:10:15 PM
01/01/1997	27	18-21 yr M (default)	null		null	2035 REED FOWLER	Main Office - Horsham Pediatrics	Unconfirmed	02/13/2024 03:06:32 PM
02/20/2000	24	Cold symptoms	null		null	2035 REED FOWLER	Anon Peds	Confirmed	02/20/2024 07:47:03 PM
01/01/1997	27	18-21 yr F (Default)	null		null	2035 REED FOWLER	Main Office - Horsham Pediatrics	Unconfirmed	02/13/2024 03:29:55 PM
01/01/2000	24	18-21 yr F (Default)	null		null	102 Administrative User	Main Office - Horsham Pediatrics	Unconfirmed	02/13/2024 03:44:44 PM
01/01/2000	24	18-21 yr F (Default)	null		null	102 Administrative User	Main Office - Horsham Pediatrics	Unconfirmed	02/13/2024 03:44:44 PM
12/16/2010	14	13-14 yr F (default)	null		null	100 Web Portal User	Main Office	Self confirmed	02/19/2024 09:54:33 AM

Number	Section	Description
a	Appointment Date	The Appointment Date column lists the date of the appointments in groups. You can minimize the individual appointment dates to refine the search.
b	Provider	The Provider lists the provider associated with the appointment. These are grouped and you can minimize the provider in each appointment date group.
c	Appointment Type	The Appointment Type column lists the appointment type as set in OP.
d	Appointment ID	The Appointment ID column lists the unique numerical ID of the appointment in OP.
e	Patient	The Patient column displays the full name of the patient associated with the appointment.
f	Patient DOB	The Patient DOB displays the date of birth for the associated patient.
g	Age	The Age column displays the age of the associated patient.
h	Encounter Template Used	The Encounter Template Used indicates the template type used for the visit (Sore throat, ear pain, flu vaccine, etc.).
i	Billing Status	The Billing Status column displays the Billing Status associated with the appointment, as seen on the Tracking Screen (Superbill Exists, etc).

j	Insurance Validation	The Insurance Validation column displays whether the insurance is validated or not.
k	Validation Date	The Validation Date column displays the date that the insurance was validated within OP.
l	Staff Name	The Staff Name column displays the name of the staff member who scheduled the appointment.
m	Location	The Location column displays the location for the appointment. This is useful for practices that have multiple locations.
n	Confirm Status	The Confirm Status column displays the confirmation status of the appointment in OP (Unconfirmed, Confirmed, etc).
j	Confirm Date	The Confirm Date column displays the date the appointment was confirmed.