Scheduler – Overview and Functions (buttons)

The Scheduler

Tool Bar (upper right corner)
What each button does:

- Opens a new window for the user to select other Appt Books from other Clinics.
- Opens a new window for the user to select patient and view past, current and future appts.
- Opens a new window for use to access the Appointment Expert mode (enhanced appt. tool)
- Produces a list of appointments & recalls per provider, patient, dates, codes, status, & clinic.
- Scheduler options (type, view, availability, time-blocks, appt background colors, etc)
- Creates notes (sticky notes)
- Shows provider non-clinic times
- Shows provider working schedules
- Prints appointment lists by clinic, book, provider, date and time
- Selects printer and printer properties, including “print to file.”

Chair Color Coding
The clinic sessions will appear in the **Active** tab in different colors:

- Gray is an unavailable time slot (i.e., the clinic is closed)
- Bronze is a clinic holiday or provider holiday
- Pale yellow is an available time slot

In **Chair Mode**, the chairs will appear in different colors:

- White if the chair is not reserved
- Yellow if the chair is reserved for another person without an appointment made yet
- Red if the chair is reserved for another person with a staff-entered appointment
- Green if the chair is reserved for the student currently logged in

**Appointment Expert**

1. Open the scheduler and click on the **Expert** icon (see below)
2. After clicking on SEARCH, the results will be displayed as shown below:

```
<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
<th>Duration</th>
<th>Provider</th>
<th>Clinic</th>
<th>Chair</th>
<th>Discipline</th>
</tr>
</thead>
<tbody>
<tr>
<td>02/11/2006</td>
<td>11:00 AM</td>
<td>01:00</td>
<td>Hauberneck, J.</td>
<td>Faculty Patient</td>
<td>FPC 10</td>
<td></td>
</tr>
<tr>
<td>02/11/2006</td>
<td>03:00 PM</td>
<td>01:00</td>
<td>Hauberneck, J.</td>
<td>Faculty Patient</td>
<td>FPC 10</td>
<td></td>
</tr>
<tr>
<td>02/12/2006</td>
<td>03:00 PM</td>
<td>01:00</td>
<td>Hauberneck, J.</td>
<td>Faculty Patient</td>
<td>FPC 10</td>
<td></td>
</tr>
</tbody>
</table>
```

Select the time you want and double click on the highlighted appointment.

3. Click and Drag the Appointment Box into the appropriate time slot and provider, then release mouse click.

NOTE: Appointment Expert can also be used to view/review a group of patients’ past, present and future appointments (e.g. A patient and a his/her family member, or patient’s carpooling)