Scheduler – Appointments.

Reserving a Chair:

1. Open the scheduler and select the Chair Tab.
2. Make sure you’re looking at the right clinic.
3. Select desired date
4. Select AM or PM
5. Select a Chair – chair turns green
6. Open the Active Tab
7. Click anywhere to open the Appt. Rolodex.
8. Locate your patient and double-click it → New Appointment Window opens.
9. Check start time to ensure that you clicked in the correct area.
10. Fill in all the details related to the appointment.
11. Click on the Tx Plan button to order equipment and supplies.

12. Select the Tx Plan/s you expect to work on during this appointment.

**NOTE:** Appointments must be made before any equipment or supplies are checked-out.

13. Exit

14. Accept the appointment (prompted as shown below)

15. Position the yellow-floating box into the desired time slot. Double-Click it to confirm.
Note: Checking Ordered Equipment and Supplies

16. Launch Personal Planner and select the Dispensary tab.
17. Click on the Magnifying Glass and search for “all ordered equipment during that time range”
18. Check the order thoroughly and make sure nothing is missing.