Reserving a Chair

1. Launch Scheduler

2. Advance to the date desired. (Use “green” date menu option)

3. Click on the Chair Tab. (Right click to change Clinic or to switch from AM to PM)

4. Click on an open chair (white box) with the discipline you need to reserve. The box (chair) turns green once booked.

5. If less than the entire clinic time for appointments, right-click and select Reserve PartialSession for. Use arrow keys for From and To Times. Ok.

Scheduling a Patient in the Reserved a Chair

1. Click on Active tab to schedule the appointment. Time reserved will be displayed in beige. Not grey.

2. Click anywhere in the tab → Appointment Rolodex will pop-up.

3. Double-Click on the patient from Notepad or Rolodex → New Appointment will pop-up

4. Click on the drop-down menu next to Appt. Code and select the estimated appt time.

5. Click on the drop-down menu next to Tx Discipline and select Tx Discipline.

6. Click on the drop-down menu Appt. Status and select REG.

7. Click on Tx. Plan. to open Appointment Treatments

8. Double-Click on the Tx’s you will complete during this appt. Those selected will “move” to the Appointed Treatments section on the screen. Close window.

9. If this is a RECALL, click on Resch. and select the scheduled recall from the bottom of the window.

10. Make a brief note in the Reason/Note window for visibility reasons.

11. Click on Accept to close New Appointment window.

12. Position the yellow-floating box where you want it. Double-Click it to confirm.

13. To change this appt., double-click on the set appt. in the Active tab and reopen New Appointment window.
Scheduling Non-Planned Treatments

1. From within the **New Appointment** window, click on **Tx, Plan.** to open **Appointment Treatments**
2. Click on the **...** button next to *Planned Procedure* at the bottom of the window → *Procedure Codes List.*
3. Click on the + beside D0100 to expand. Double-Click D0150 to select → *Tx Code* will be listed in the *Planned Procedure* field.
4. Click on the right-facing arrow to move the procedure into the *Appointed Treatments* window. Close Window.

Re-Scheduling an Appointment

1. In the **Active** tab, right-click on the appointment and select *Reschedule.*

Position the yellow-floating box to desired time slot. Double-Click it to confirm.

Confirming, Cancelling, Failing, Deleting an Appointment

In the **Active** tab, right-click on the appointment and select *Confirm, Cancel (four options), Failed, No Show,* or *Delete (your error).* Enter a note in either the EHR or in a contact note on the Patient Card noting the cancellation and failures.

Click on **Personal Planner** to view and edit appointments.
Right-Click on patient to open desired appointment, or to select patient.
Other tabs in the **Personal Planner** behave similarly.