Assigning Patient to Provider for Student Rotations

1. Select patient from Rolodex, then click on the Patient Card icon to bring up the Patient Card

   a. Alternatively you can right click on the patient from the Scheduler.
   b. Click on Patient Card. This will open the patient card as well.
2. Click on the Patient name in the upper left portion of the Patient Card to open the Patient Info window.
   a. Click on the Provider button to open the Provider Assignment window
3. Click on the Ellipsis button to the right of the Provider to bring up the Providers List.

4. Type in the criteria for the Student that you want to assign to this patient and press Enter. Click on the Student to select, then double click on the student (Provider) to assign to the patient.
   a. This will bring you back to the Provider Assignment window (above) with the Provider field completed.
   b. Complete the Start Date and End Date for this student’s rotation assignment.
   c. Click on the icon above to assign the patient to this student.
5. Once the Provider has been entered in the lower portion of the Provider Assignment window, click the “x” in the upper right corner of the window to close the window. It will bring you back to the Patient Info window, displaying the assigned Provider.