Planned Appointments

A planned appointment is usually scheduled in the future and would normally work with Planned Treatment. This appointment is available to be scheduled but would usually be planned with a “not before date” attached.

1. Select the Planned Treatment in the Tx History tab of the EHR that you wish to add a Planned Appointment for, and right-click:
2. Select **Add Planned Appt** from the drop-down menu:
3. Enter in the necessary appointment credentials: **Provider**, **Appt. Code**, **Clinic** and any other relevant information. Don’t forget to include the **Not Before Date** (this isn’t necessary, but can be helpful).

![New Planned Appointment window](image)

**When Booking Multiple Appointments:**

*Use the Reason field in the New Planned Appointment window to make note of which appointment this is in the series (e.g. Resto 1 of 3, Resto 2 of 3, Resto 3 of 3).*
4. Behind the **Tx Plan** button, the user can see which treatment is tied to the appointment.

5. A yellow icon now appears in the same line as the **Planned Treatment** in the EHR indicating there is a **Planned Appointment** linked to that treatment.
6. The Scheduling staff can view the new **Planned Appointment** from the **Family Appointments** window.
7. There is the option of clicking the Schedule button along the right-hand side of the screen, or right-click on the selected Planned Appointment and choose Schedule from the drop-down menu.

If your institution uses Appointment Expert, select the Schedule with Expert option. In our example, we will choose Schedule.
8. The appointment will now show in the **Scheduler** as a yellow floating appointment. Keep in mind the **Not Before Date** when scheduling – an error will appear if the user tries to book before that date.
9. Move through the **Scheduler** until the user is able to find a suitable day and time. Drag the appointment to the desired time slot and double-click to seat the appointment.