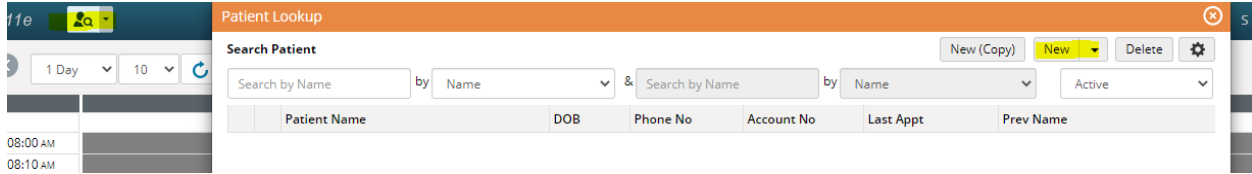


# How to Schedule a New or Existing Patient

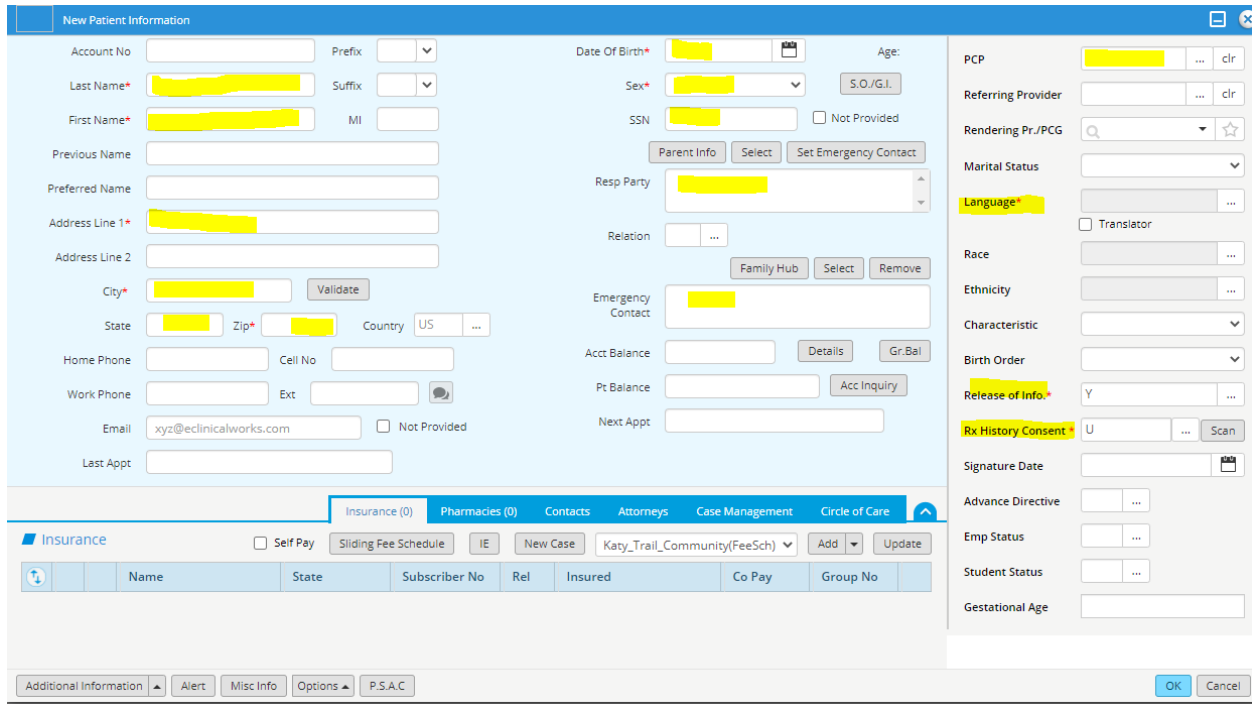
- Procedure on how to schedule a new or existing patient

How to Schedule a new Patient for appointment:

- If you get a person calling you and they are not an established patient, you will have to add them to the system before scheduling an appt.
- Hit the spyglass in the top screen a window will pop up click on new.



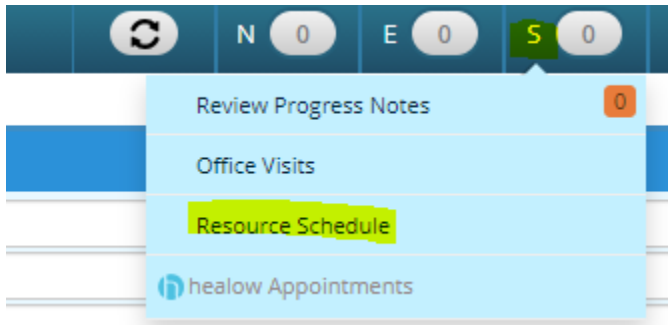
- Fill out the required information – the lines with the red \* next to it along with highlighted information.



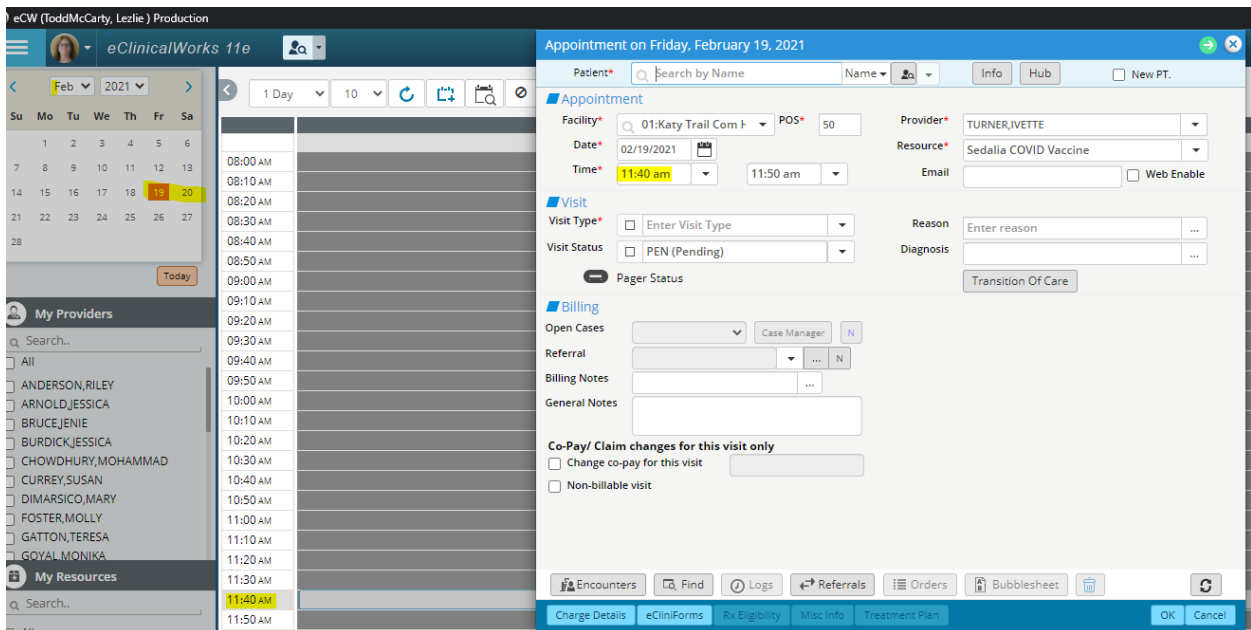
- Once you get them in the system then you schedule BOTH New or Existing patient the same way.

# How to Schedule a New or Existing Patient

- Click on the S at the top ribbon and choose Resource Schedule

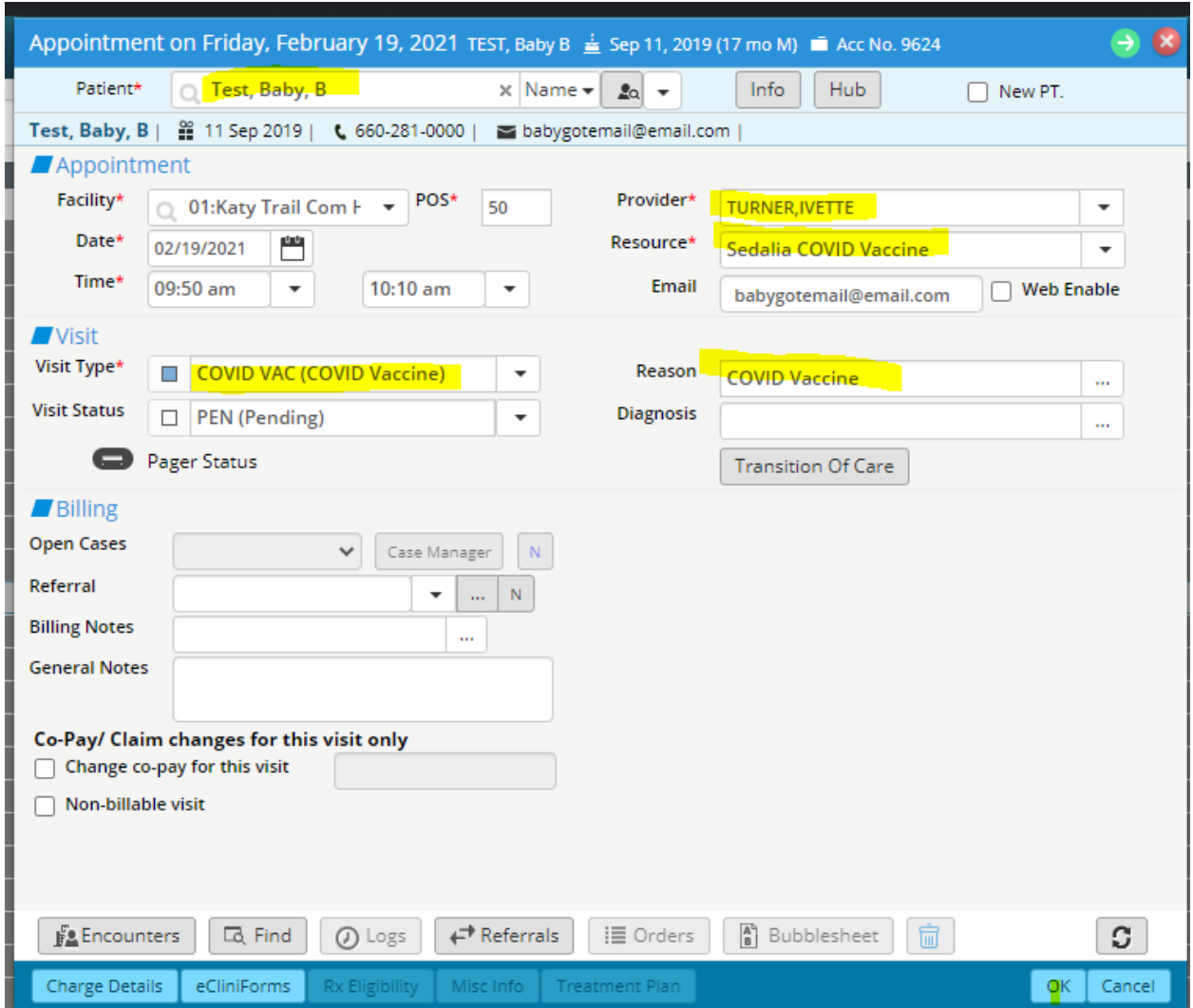


- Make sure the date is correct at the top. Choose a time for appt.- double click on the line next to time slot and it will pop up an appointment window.



## How to Schedule a New or Existing Patient

- Put in patient name along with the following fields:

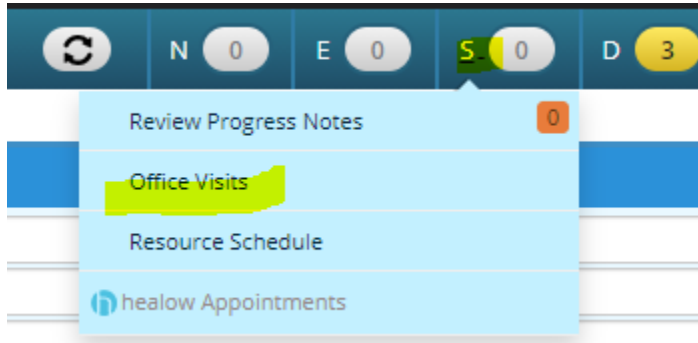


The screenshot shows a software interface for scheduling an appointment. The patient name is 'Test, Baby, B'. The appointment is for Friday, February 19, 2021, at 09:50 am. The facility is '01:Katy Trail Com H' and the provider is 'TURNER, IVETTE'. The resource is 'Sedalia COVID Vaccine'. The visit type is 'COVID VAC (COVID Vaccine)' and the reason is 'COVID Vaccine'. The billing section includes fields for Open Cases, Referral, Billing Notes, and General Notes. There are also checkboxes for 'Change co-pay for this visit' and 'Non-billable visit'. The interface includes a navigation bar at the bottom with buttons for Encounters, Find, Logs, Referrals, Orders, Bubblesheet, and a search bar.

- For Covid -use the following providers and resources
  - Provider: Sedalia – Jeanie Bruce  
Warsaw – Megan Yonker  
Versailles – Mary DiMarsico  
Marshall – Shari Thompson
  - Resource: Sedalia Covid Vaccine  
Warsaw Covid Vaccine  
Versailles Covid Vaccine  
Marshall Covid Vaccine
  - Reason: Covid Vaccine (1<sup>st</sup> shot), Covid Vaccine 2 (2<sup>nd</sup> shot).
  - Visit type: Should pop up COVID VAC (covid Vaccine). Hit ok

## How to Schedule a New or Existing Patient

- For any other type of appointment make sure the provider, resource, type of visit and reason are entered.
- Once the patient is Scheduled you can go to the Office Visit Screen:



- Click on patient and progress note will come up – follow the Covid Workflow.