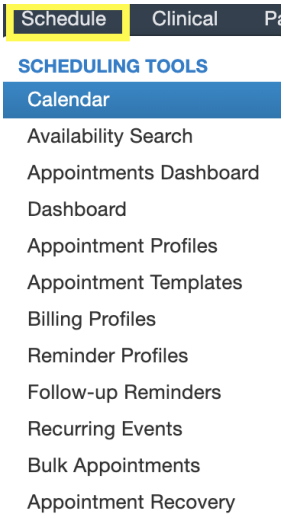
How do I schedule an appointment? (EHR Web)

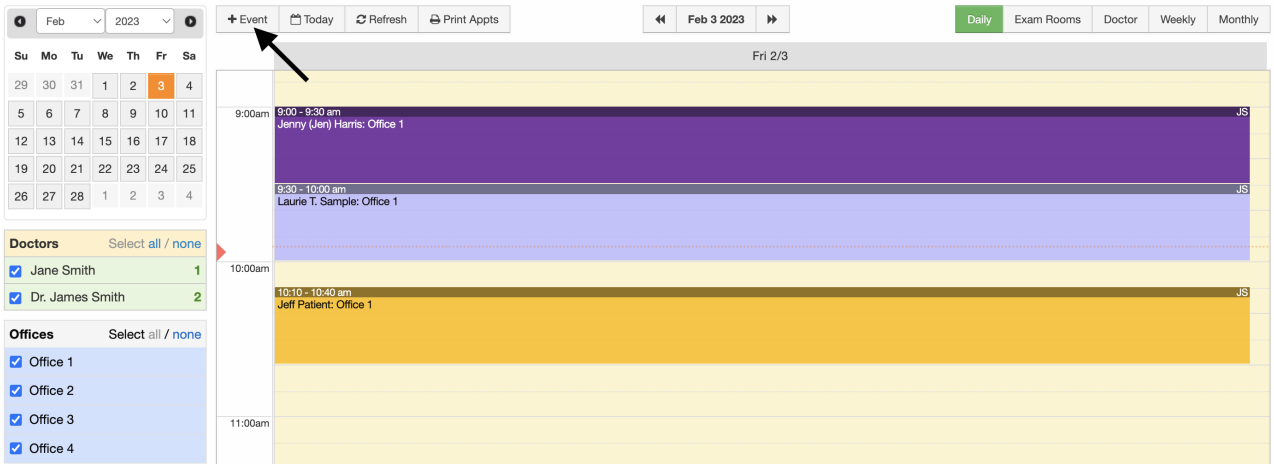
07/08/2024 7:37 pm EDT

You can easily schedule an appointment for new or existing patients from the calendar. In just a few short steps you will be able to make an appointment and add specific information to the patient file straight from your DrChrono calendar.

1. Go to **Schedule** > **Calendar**.

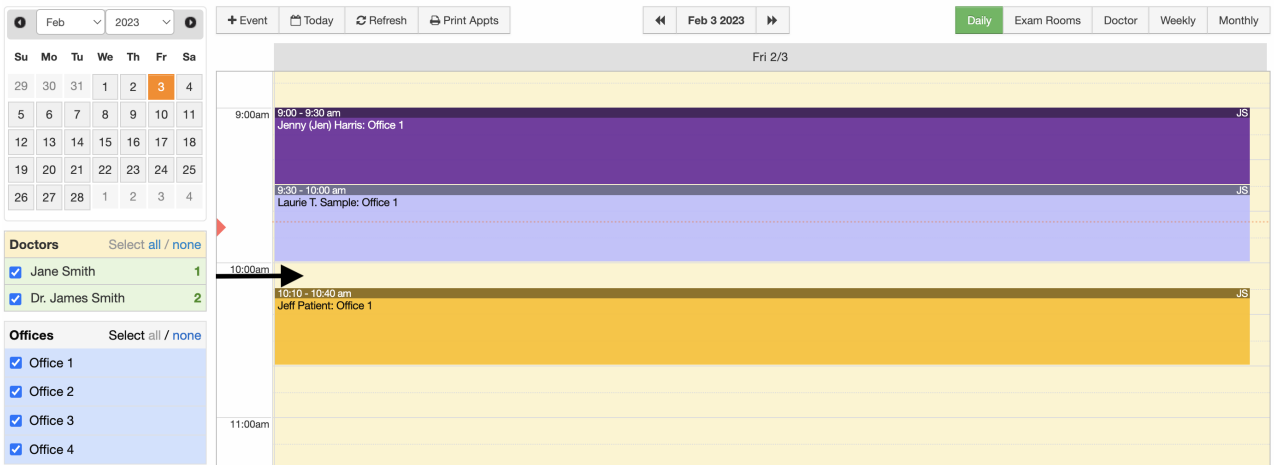


2. The easiest way to schedule an appointment is to click on an empty time slot.

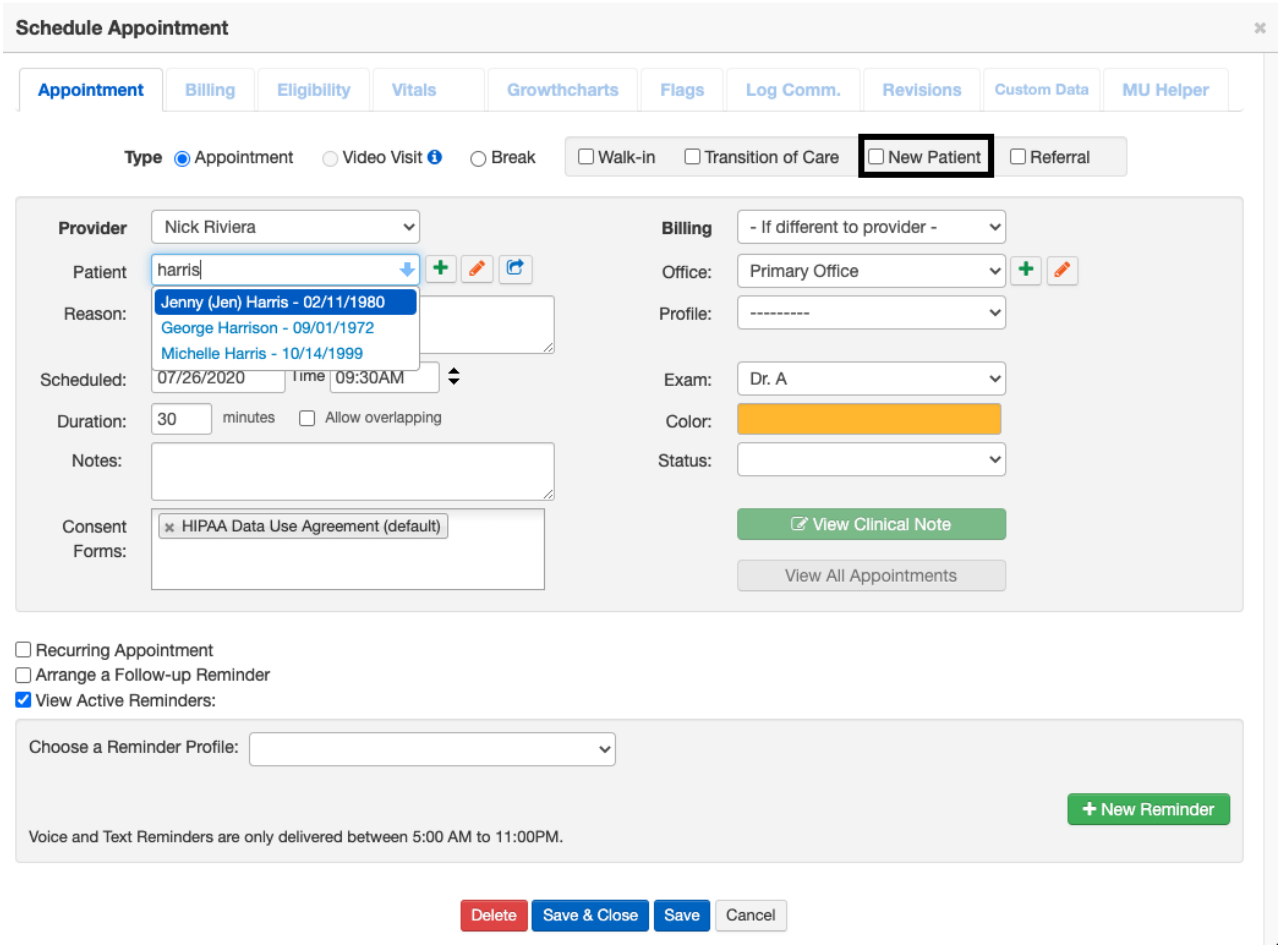


--OR--

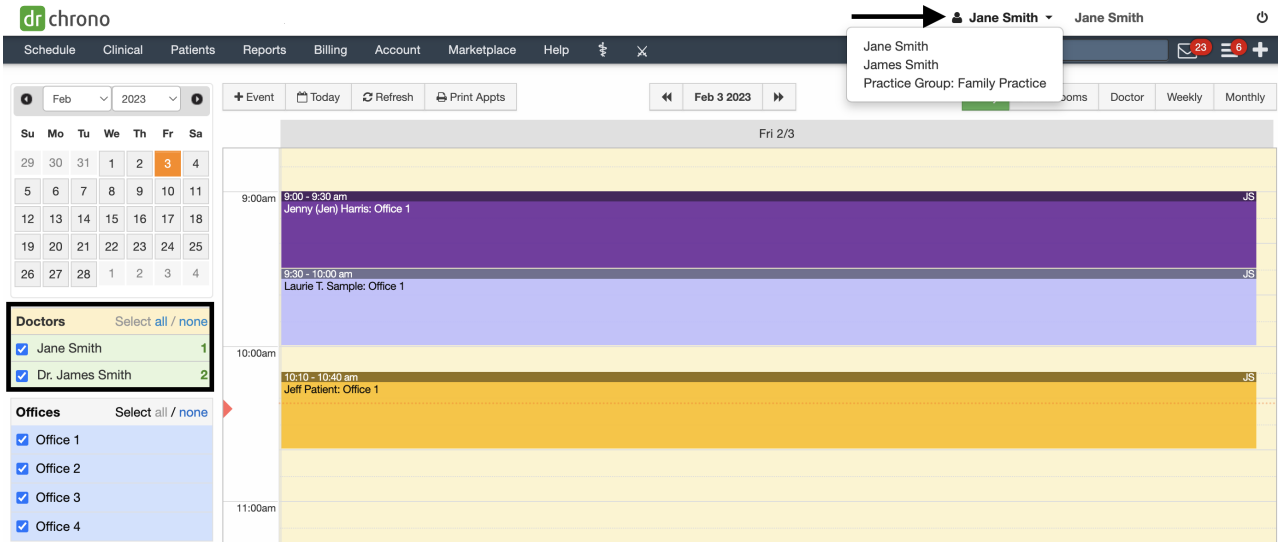
You can click **+ Event** and enter the time and date of the appointment.



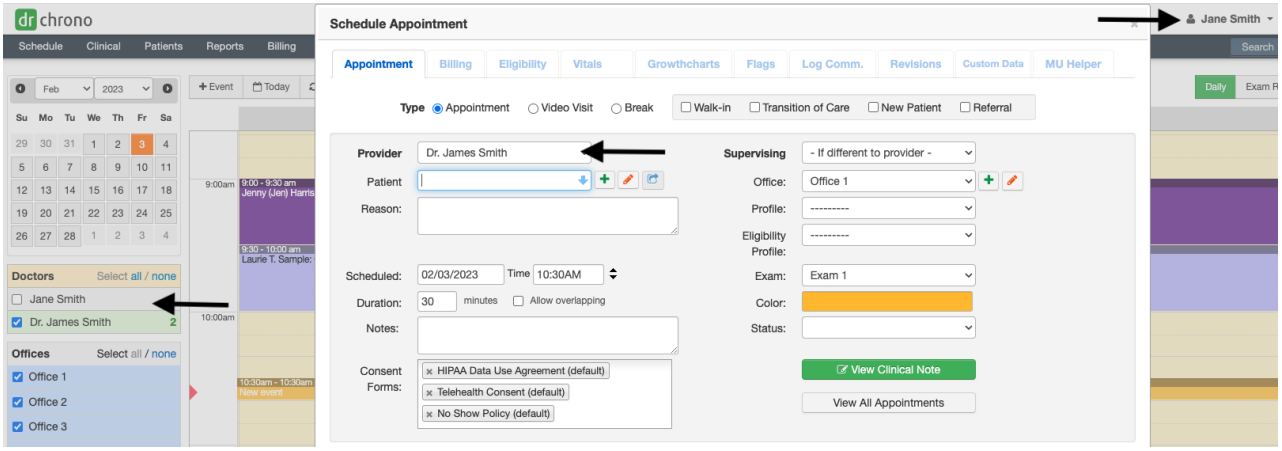
3. Start typing the patient's name into the **Patient** field. If the patient is an existing patient you will see their name appear in a drop-down menu for you to choose from. If the patient is new to your practice, select the **New Patient** check box and fill out the information accordingly.



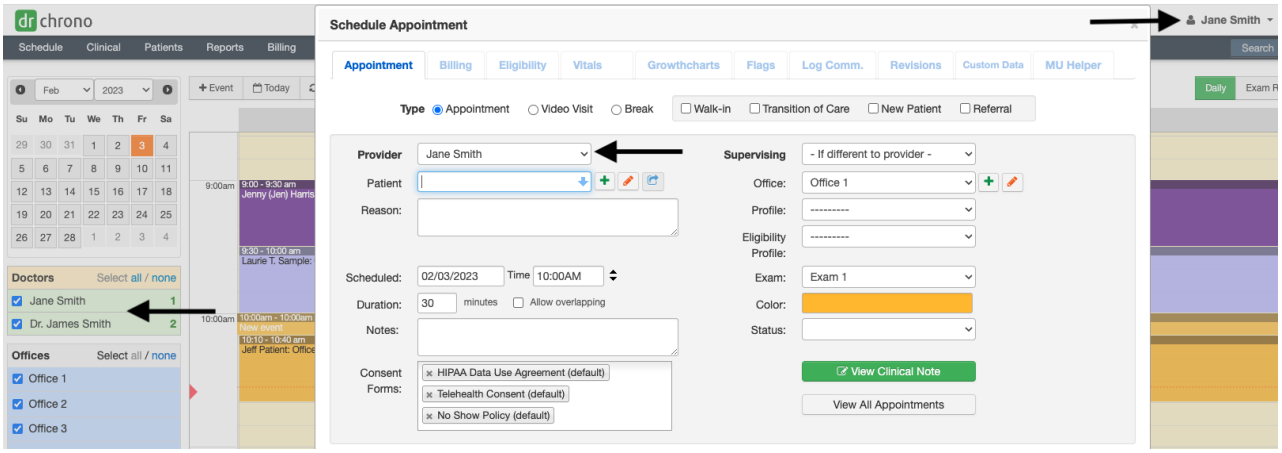
The default provider for the appointment will depend on which provider is selected in the provider dropdown on top and the providers selected on the side. Keep in mind that the provider for the appointment can be changed anytime in the appointment window.



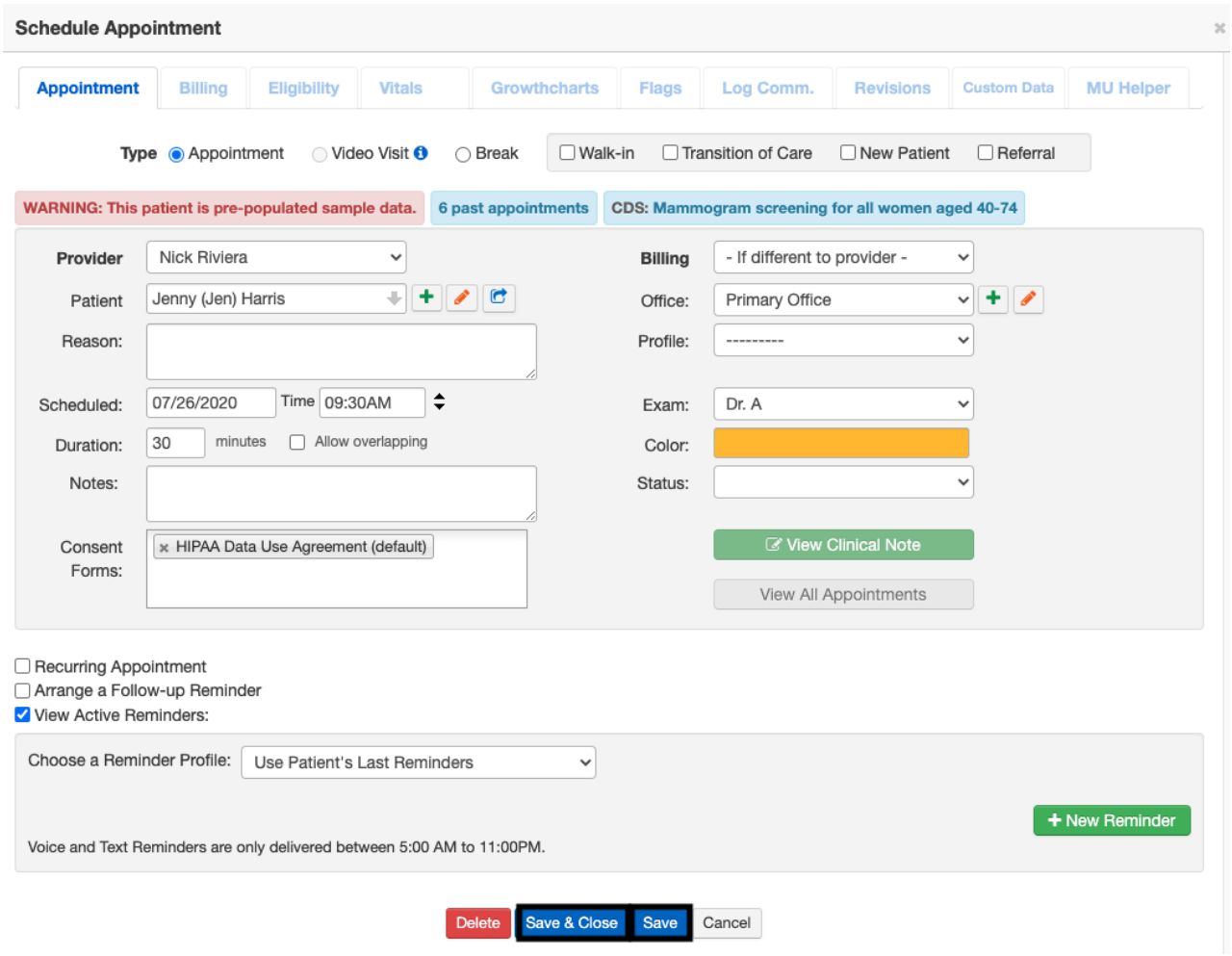
For example, if Jane Smith is selected in the provider dropdown above, and both providers are selected on the side, Jane Smith will appear as the default provider for the appointment.



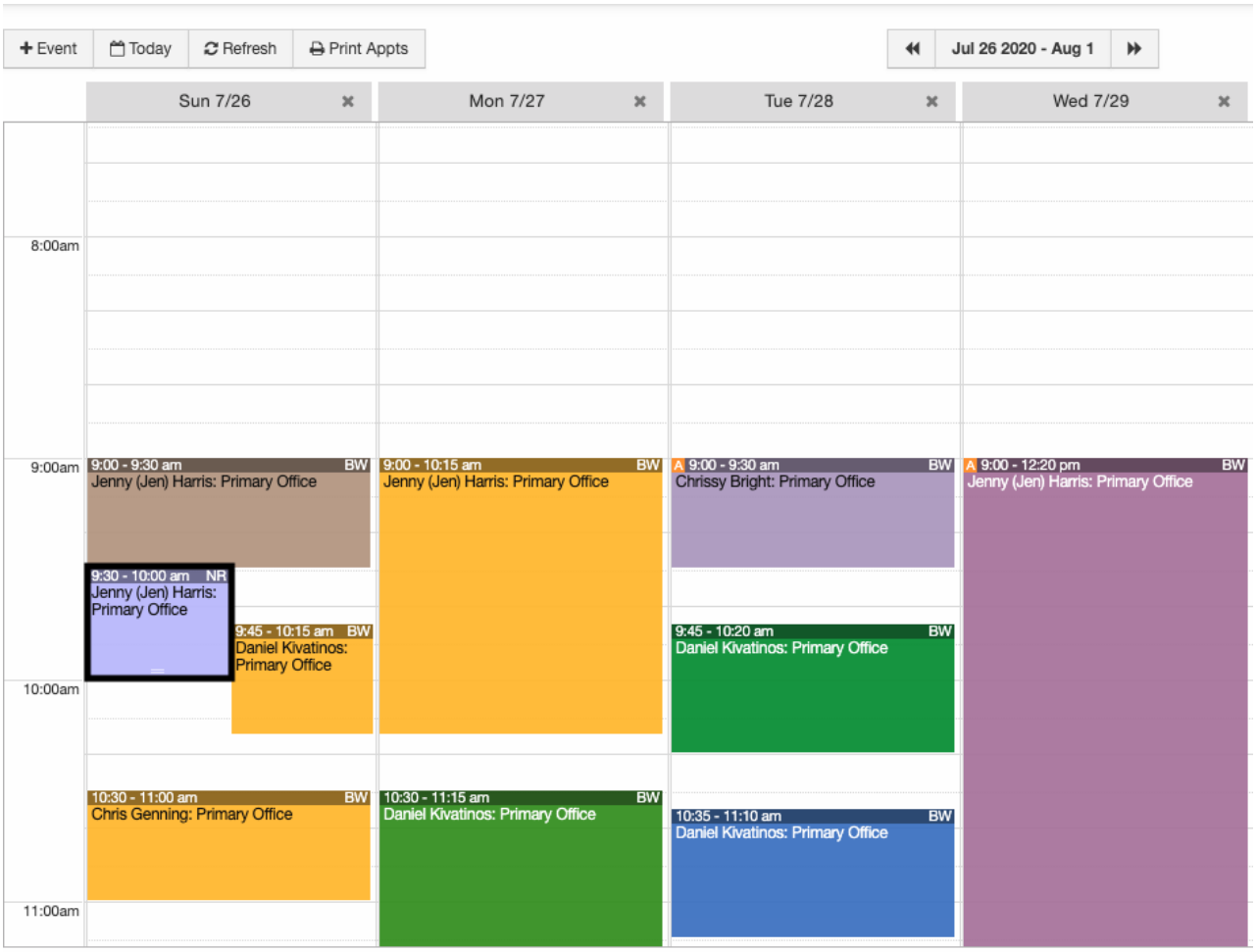
Or, if Jane Smith is selected in the provider dropdown above but not selected on the side, James Smith will appear as the default provider for the appointment.



4. Once you have filled out all of the appointment information, click **Save and Close** after entering all the information needed. If you want to save the appointment, but still work within the appointment window, select **Save** to keep the appointment window open and continue working.



5. You will now see the patient's appointment show up on your DrChrono calendar.



To go to your calendar click here.