

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.

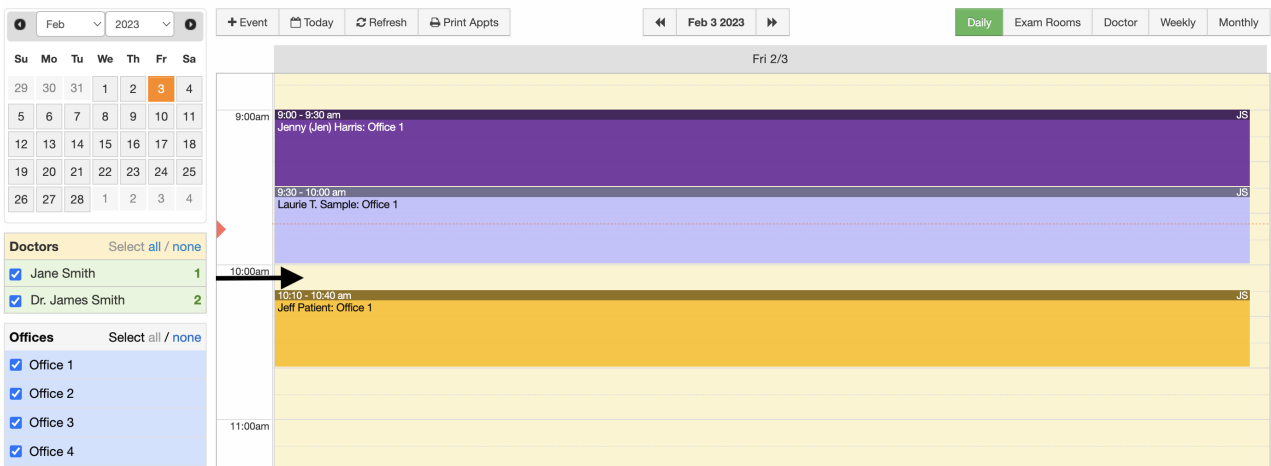
The screenshot shows a navigation menu with three tabs: 'Schedule' (highlighted in yellow), 'Clinical', and 'Pa'. Below the tabs is a section titled 'SCHEDULING TOOLS' with a list of options: 'Calendar' (highlighted in blue), 'Availability Search', 'Appointments Dashboard', 'Dashboard', 'Appointment Profiles', 'Appointment Templates', 'Billing Profiles', 'Reminder Profiles', 'Follow-up Reminders', 'Recurring Events', 'Bulk Appointments', and 'Appointment Recovery'.

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

The screenshot shows a calendar interface for February 2023. The main calendar grid shows the date 'Fri 2/3'. On the left, there are filters for 'Doctors' (Jane Smith, Dr. James Smith) and 'Offices' (Office 1, Office 2, Office 3, Office 4). The main calendar area shows appointment slots for 'Jenny (Jen) Harris: Office 1' (9:00 - 9:30 am) and 'Laurie T. Sample: Office 1' (9:30 - 10:00 am). There is also a slot for 'Jeff Patient: Office 1' (10:10 - 10:40 am). A black arrow points to the '+ Event' button at the top of the calendar.

--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.

Schedule Appointment

Appointment | Billing | Eligibility | Vitals | Growthcharts | Flags | Log Comm. | Revisions | Custom Data | MU Helper

Type Appointment Video Visit Break Walk-in Transition of Care **New Patient** Referral

Provider: Nick Riviera

Patient: harris | Jenny (Jen) Harris - 02/11/1980 | George Harrison - 09/01/1972 | Michelle Harris - 10/14/1999

Reason: [Empty]

Scheduled: 07/26/2020 Time: 09:30AM

Duration: 30 minutes Allow overlapping

Notes: [Empty]

Consent Forms: x HIPAA Data Use Agreement (default)

Billing: - If different to provider -

Office: Primary Office

Profile: -----

Exam: Dr. A

Color: [Orange]

Status: [Empty]

View Clinical Note

View All Appointments

Recurring Appointment
 Arrange a Follow-up Reminder
 View Active Reminders:

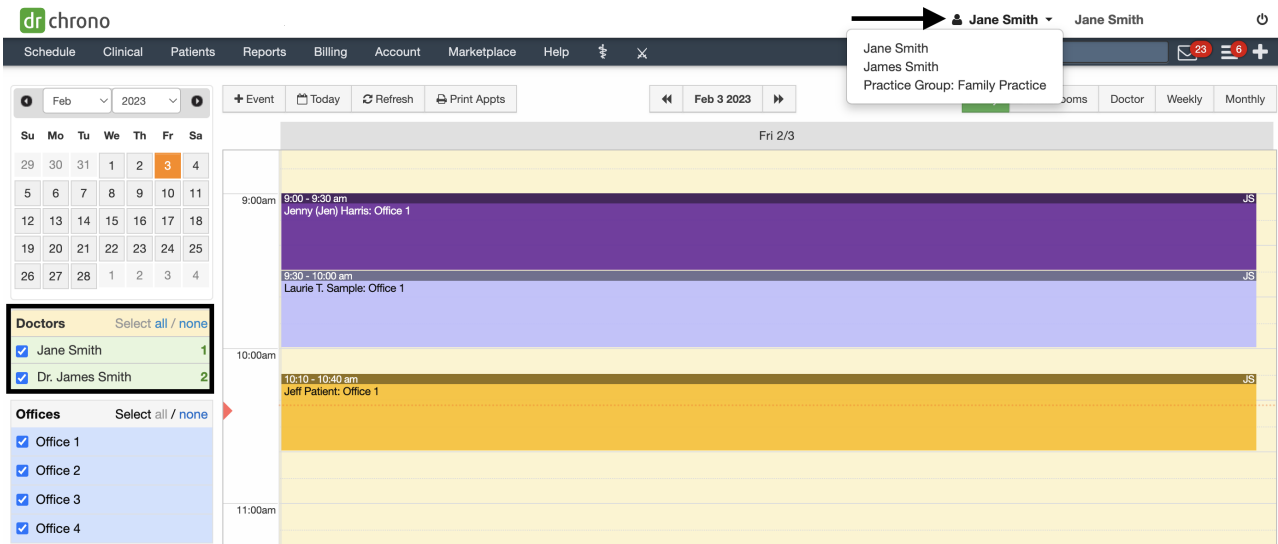
Choose a Reminder Profile: [Empty]

Voice and Text Reminders are only delivered between 5:00 AM to 11:00PM.

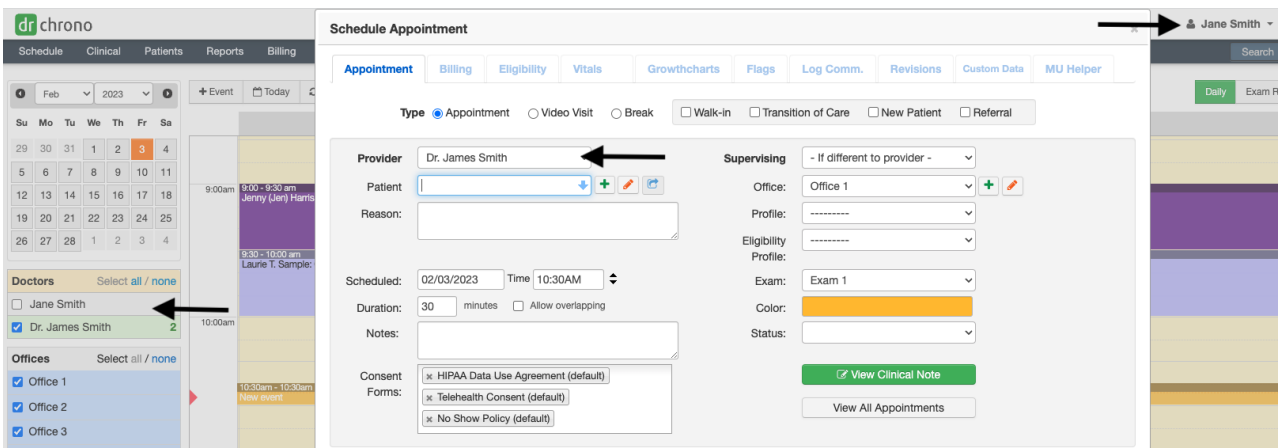
+ New Reminder

Delete Save & Close Save Cancel

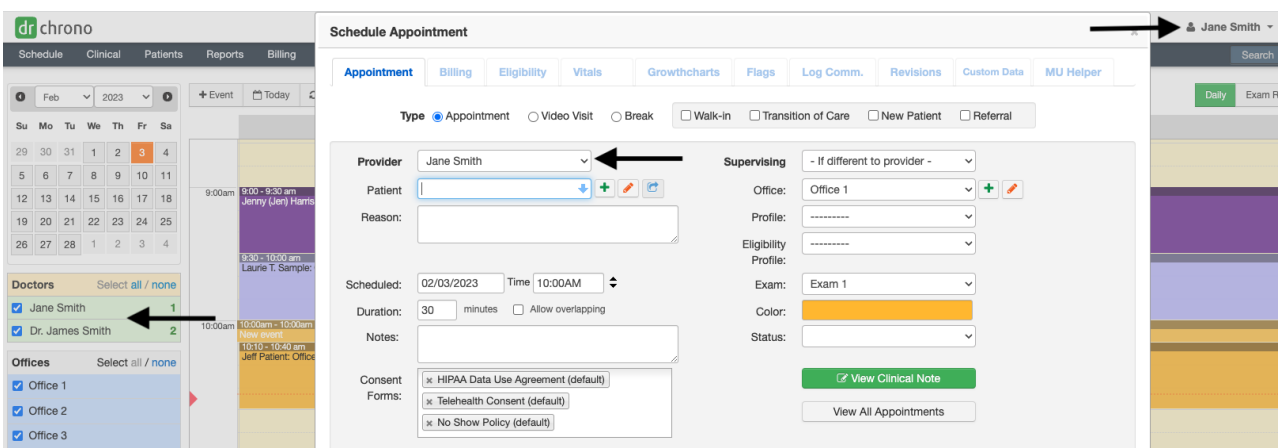
The default provider for the appointment will depend on which provider is selected in the provider dropdown on top and the providers selected on the side. Keep in mind that the provider for the appointment can be changed anytime in the appointment window.



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.

Schedule Appointment

Appointment

Billing

Eligibility

Vitals

Growthcharts

Flags

Log Comm.

Revisions

Custom Data

MU Helper

Type Appointment Video Visit Break Walk-in Transition of Care New Patient Referral

WARNING: This patient is pre-populated sample data.

6 past appointments

CDS: Mammogram screening for all women aged 40-74

Provider	Nick Riviera	Billing	- If different to provider -
Patient	Jenny (Jen) Harris	Office:	Primary Office
Reason:		Profile:	-----
Scheduled:	07/26/2020	Exam:	Dr. A
Time	09:30AM	Color:	
Duration:	30 minutes <input type="checkbox"/> Allow overlapping	Status:	
Notes:			
Consent Forms:	<input checked="" type="checkbox"/> HIPAA Data Use Agreement (default)	View Clinical Note	
		View All Appointments	

- Recurring Appointment
- Arrange a Follow-up Reminder
- View Active Reminders:

Choose a Reminder Profile: Use Patient's Last Reminders

[+ New Reminder](#)

Voice and Text Reminders are only delivered between 5:00 AM to 11:00PM.

[Delete](#) [Save & Close](#) [Save](#) [Cancel](#)

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

		+ Event		Today	Refresh	Print Appts	Jul 26 2020 - Aug 1	
		Sun 7/26	Mon 7/27	Tue 7/28	Wed 7/29			
8:00am								
9:00am	9:00 - 9:30 am BW Jenny (Jen) Harris: Primary Office 9:30 - 10:00 am NR Jenny (Jen) Harris: Primary Office 9:45 - 10:15 am BW Daniel Kvatinos: Primary Office	9:00 - 10:15 am BW Jenny (Jen) Harris: Primary Office	A 9:00 - 9:30 am BW Chrissy Bright: Primary Office 9:45 - 10:20 am BW Daniel Kvatinos: Primary Office	A 9:00 - 12:20 pm BW Jenny (Jen) Harris: Primary Office				
10:00am	10:30 - 11:00 am BW Chris Genning: Primary Office	10:30 - 11:15 am BW Daniel Kvatinos: Primary Office	10:35 - 11:10 am BW Daniel Kvatinos: Primary Office					
11:00am								

To go to your calendar click [here](#).