

How do I know who scheduled an appointment?

07/08/2024 7:59 pm EDT

If you need to know which provider or staff member created an appointment, you can find out on the schedule.

Hover over the appointment and the appointment information will be displayed on the left-hand side of the screen.

The screenshot displays a medical scheduling interface. At the top, there is a navigation bar with tabs for Schedule, Clinical, Patients, Reports, Billing, Account, Marketplace, and Help. Below the navigation bar, there is a patient profile card for Laurie Sample, Female, born 12/08/1990. The card includes a photo and a list of appointment details: Provider (Dr. James Smith), Location (Exam 1), Time (10:12 AM for 10 minutes), Date (Wednesday June 15), Created (10:13:02 AM, 6/15/2022), Created By (Dr. James Smith), Reason, Status, Phone ((650) 555-5555), Chart ID (SAJA000001), Primary Insurer (United HealthCare 87726), Secondary Insurer, Co-pay (20), Referrer (Sample Doctor), Notes, and Next Appt. (Thursday Jun 2,). To the right of the patient card is a scheduling grid. The grid shows a 10:00am slot with an appointment for Laurie Sample: Office 1 from 10:12 - 10:22 am. A tooltip is displayed over this appointment, showing 'Created By Dr. James Smith'. A black arrow points from the 'Created By' field in the patient card to the tooltip. Below the 10:00am slot is an 11:00am slot, and below that is a 12:00pm slot with a 'Break Lunch (Dr. James Smith)' from 12:00 - 12:30 pm. The grid continues down to 1:00pm.

If a patient schedules through the [scheduling widget](#), the Created By field show `online_scheduling_widget` as the creator.

Schedule Clinical Patients Reports Billing Account Marketplace Help

Laurie Sample
Female - 12/08/1990

+ Event Today Refresh Print Appts

Jun 15 2022

Wed 6/15

Provider Dr. James Smith
Location Exam 1
Time 01:30 PM for 20 minutes
Date Wednesday June 15
Created 1:10:40 PM, 6/15/2022
Created By online_scheduling_widget
Reason Sick
Status
Phone (650) 555-5555
Chart ID SAJA000001
Primary Insurer United HealthCare 87726

1:00pm

1:30 - 1:50 pm
Laurie Sample: Office 3

2:00pm

You can also see who scheduled an appointment in the Audit Log (Go to **Clinical > Audit Log**). The Audit Log includes more information about the appointment. You can see who created the appointment under the user column.

Schedule Clinical Patients Reports Billing Account Marketplace Help

User

usersample

Audit Log Report

Patient's Name: usersample Appointment: 06/08/2022 06/15/2022 Update Filter

Export to File

Date	Time	Patient	User	Type	Action	Details	IP
06/15/2022	10:13:02 AM		usersample	Appointment	Create	Created Appointment [214851291] 06/15/22 10:12 Laurie Sample: from iPad	
06/15/2022	10:13:02 AM	Laurie Sample [SAJA000001]	usersample	Appointment	Update	Updated Appointment [214851291] 06/15/22 10:12 Laurie Sample: Changed "Scheduled Time" from "None" to "2022-06-15 10:12:00" Changed "Patient" from "[None]" to "Laurie Sample [100103542]" Changed "Office" from "[None]" to "Office 1 [215348]" Changed "Duration" from "15" to "10" Changed "Doctor" from "[None]" to "Dr. James Smith [248094]" Changed "Payment Profile" from "" to "Insurance" Changed "Patient Payment Posted Date" from "None" to "2022-06-15"	

PAGE 1