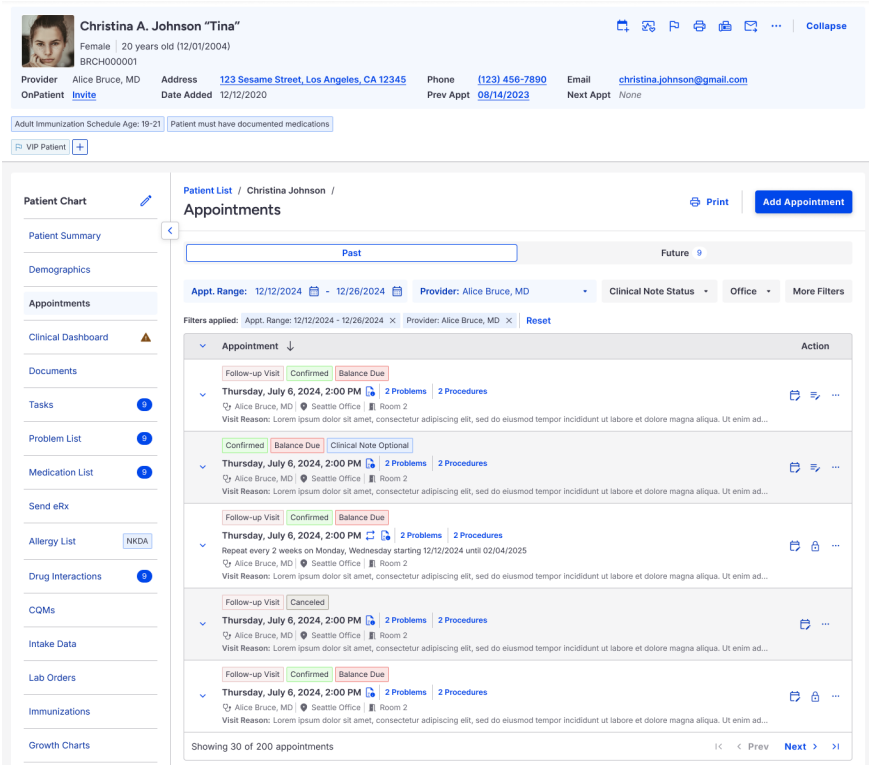
Patient Chart Appointments

Last modified on 10/08/2026 7:52 pm EDT

Screen layout | Future appointments | Past appointments

The Patient Chart **Appointments** page provides a comprehensive view of all scheduled and past patient visits. You can toggle between future and past appointments, apply filters to find specific visits, and access detailed information about each appointment.



Screen layout

At the top of the screen, you'll find:

- **Print button** – Exports the current view to a printable format
- **Add Appointment button** – Creates a new patient appointment
- **Past/Future toggle** – Switches between viewing upcoming and completed appointments

Future appointments

View future appointments

When you select the Future view, the system displays all upcoming patient visits. Each appointment shows key information including:

- Date and time (displayed as example: Thursday, July 6, 2024, 2:00 PM)
- Provider name
- Office location
- Exam room
- Recurring appointment indicator (if applicable)
- Note indicator (shows if notes exist; displays a lock icon if the note is locked)

- Number of reminders sent

Filter future appointments

You can quickly filter appointments using the face-up filters at the top of the screen:

- **Appointment Range** – Select a specific date range
- **Provider** – Filter by specific healthcare provider
- **Office** – Filter by office location
- **More Filters** – Opens additional filtering options

The More Filters option provides access to:

- Appointment Profile (dropdown selection)
- Appointment Status (dropdown selection)
- Billing Status (dropdown selection)
- Clinical Note Status (checkboxes for Locked/Not Locked)

Active filters display at the top of the grid so you always know which filters are applied.

Sort appointments

You can sort the appointments by clicking on the appointment date column header. This allows you to organize visits chronologically in ascending or descending order.

Expand appointment details

Each appointment row can be expanded to reveal additional information:

- **Reason for Visit** – The documented purpose of the appointment
- **Appointment Notes** – Any notes recorded about the visit
- **Reminders Sent** – A log of appointment reminders that have been sent to the patient
- **Communications Log** – A complete history of communications with the patient

Recurring appointments

If a patient has recurring appointments scheduled, the system displays a recurring appointment icon next to the appointment date. You can expand these appointments to see a list of all scheduled recurring visits in a sub-grid.

Manage multiple appointments

The grid includes selection tools that allow you to:

- **Select individual appointments** – Click the checkbox next to any appointment
- **Select all appointments** – Click the checkbox in the header to select all appointments on the current page
- **Bulk cancel appointments** – Select multiple appointments and cancel them simultaneously

The expand/collapse icon in the header allows you to expand or collapse all appointments at once for easier viewing.

Navigate pages

If you have many appointments, use the pagination controls at the bottom of the grid to move between pages of results.

Past appointments

View past appointments

When you select the Past view, the system displays all completed patient visits. Past appointments show similar information to future appointments, with some key differences:

Each past appointment displays:

- Date and time
- Appointment badges (Profile, Status, and Billing Status when applicable)
- Provider name
- Office location
- Exam room
- **Diagnoses** – ICD-10 codes from the clinical note
- **CPT Code** – Procedure codes for the visit
- Recurring appointment indicator (if applicable)
- Note indicator (shows if notes exist; displays a lock icon if the note is locked)

Filter past appointments

Past appointments offer the same filtering capabilities as future appointments:

- Face-up filters for Appointment Range, Provider, and Office
- More Filters option for Appointment Profile, Status, Billing Status, and Clinical Note Status

Sort past appointments

You can sort past appointments by clicking on the appointment date column to organize visits chronologically.

Expand past appointment details

Expand any past appointment to view:

- **Reason for Visit** – The original reason the patient scheduled the appointment
- **Notes** – Documentation from the visit
- **Reminders Sent** – Record of reminders sent before the appointment

Communications log

Each past appointment includes a detailed communications log where you can:

- View all communications with the patient
- Filter between Active and Archived communications
- Add new log entries using the "+ Log" button

Appointment actions

For each past appointment, you can access several actions through the Actions column:

Edit Appointment – Opens a window to modify appointment details

Edit Notes – Opens a window to update appointment notes

Additional Actions (Ellipsis menu):

- **Super Bill** – Opens a PDF of the patient receipt with options to print or send to the patient's profile
- **View Summary of Care Provided** – Opens the appointment's clinical summary document (CCDA file) in a new window

Print past appointments

Click the Print button to generate a printable version of the current page of past appointments. The printout includes the day of the week for each appointment date, matching the format displayed on screen.