How do I schedule an appointment? (EHR Web)

07/24/2024 4:15 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.

Schedule	Clinical	Pa
SCHEDULING	G TOOLS	
Calendar		
Availability	Search	
Appointmer	nts Dashboard	d
Dashboard		
Appointmer	nt Profiles	
Appointmer	nt Templates	
Billing Profi	les	
Reminder P	rofiles	
Follow-up F	Reminders	
Recurring E	vents	
Bulk Appoir	ntments	
Appointmer	nt Recovery	

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

0	Feb	>	~ 2	2023	~	0	+ Event	Today 2 Refresh ⊖ Print Appts 4 Feb 3	2023	Daily	Exam Rooms	Doctor	Weekly	Monthly
Su	Мо	Tu	We	Th	Fr	Sa			Fri 2/3					
29	30	31	1	2	3	4								
5	6	7	8	9	10	11	9:00am	- 9:30 am ny (Jen) Harris: Office 1						JS
12	13	14	15	16	17	18								
19	20	21	22	23	24	25								
26	27	28	1	2	3	4		- 10:00 am re T. Sample: Office 1						JS
Doo	tors		S	elect	all / r	one								
	Jane	Smith	ı			1	10:00am							
	Dr. Ja	mes	Smit	h		2		0 - 10:40 am Patient: Office 1						JS
Offi	ces		S	elect	all / r	ione								
	Office	e 1												
	Office	2												
	Office	3					11:00am							
	Office	e 4												

--OR---

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

0	Feb		~	2023	~	0	+ Event	🗂 Today	\mathcal{C} Refresh	🖨 Print Appts	H Feb 3 202	23	Daily	Exam Rooms	Doctor	Weekly	Monthly
Su	Мо	Tu	We	Th	Fr	Sa						Fri 2/3					
29	30	31	1	2	3	4											
5	6	7	8	9	10	11	9:00am	9:00 - 9:30 am Jenny (Jen) Ha	arris: Office 1								JS
12	13	14	15	16	17	18											
19	20	21	22	23	24	25											
26	27	28	1	2	3	4		9:30 - 10:00 am Laurie T. Samp									JS
Doc	tors		S	elect	all / r	none											
	Jane	Smith	٦			1	10:00am	►									
	Dr. Ja	mes	Smit	th		2		10:10 - 10:40 ar Jeff Patient: O	n ffice 1								JS
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v (Office	1															
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	Office	4															

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.

ppointment	Billing	Eligibility	Vitals	Growt	hcharts	Flags	Log Comm.	Revisions	Custom Data	MU Helper
Тур	e 💿 Appoint	ment OVid	eo Visit 🜖	⊖ Break	U Walk-	in 🗌 Tra	nsition of Care	New Patient	Referral	
Provider	Nick Riviera		~			Billing	- If different to	provider -	~	
Patient	harris		++,	/		Office:	Primary Office	9	v 🕇 🥖	
Reason:	George Harris	larris - 02/11/19 son - 09/01/197				Profile:			*	
Scheduled:	Michelle Harr 07/26/2020	is - 10/14/1999 Time 09:3	OAM \$			Exam:	Dr. A		~	
Duration:	30 minu	tes 🗌 Allow	overlapping			Color:				
Notes:						Status:			*	
Consent	× HIPAA Dat	a Use Agreeme	nt (default)				C View	Clinical Note		
Forms:							View All A	ppointments		
lecurring Appo rrange a Follo lew Active Re	w-up Remind	er								
noose a Remir	nder Profile:				~					
ico and Toxt P	eminders are o	nly delivered be	ween 5:00 AM	to 11:00PM					+	New Reminde

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.

dr	ch	гог	סר															→ Lane Smith → Jane Smith
Sc	hedul	le	Cli	inical		Pati	ents	Repor	ts Billing	Account	Marketplace	Help	₩₽-	×				Jane Smith 23 = 6
0	Fet	5	~	2023	3	~	0	+ Event	🗂 Today	${oldsymbol{\mathcal{C}}}$ Refresh	🔒 Print Appts			•	H Feb	3 2023	••	Practice Group: Family Practice
Su	Мо	Tu	We	∋ TI	h F	r :	Sa									Fr	ri 2/3	
29	30	31	1	2	3		4											
5	6	7	8	9	1	0	11	9:00am	9:00 - 9:30 am									
12	13	14	15	5 16	6 1 ⁻	7	18		Jenny (Jen) Ha	arris: Office 1								
19	20	21	22	2	3 2	4 :	25											
26	27	28	1	2	3	5	4		9:30 - 10:00 am Laurie T. Samp	ole: Office 1		_			_	_	_	
Doc	tors		;	Sele	ct all	/ nc	one											
v .	Jane	Smit	th				1	10:00am										
v (Dr. Ja	ames	s Sm	ith			2		10:10 - 10:40 a Jeff Patient: O	n ffice 1								
Offi	ces		;	Sele	ct all	/ nc	one		oon raton. o									
v (Office	91																
v (Office	2																
v (Office	3						11:00am										
v (Office	94						ouan										

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.

d	ch	ron	0						Schedule App	ointment									
Sc	nedule	e	Clinic	cal	Pa	tients	Repor	ts Billing	Appointment	Billing	Eligibility	Vitals	Gro	wthcharts	Flags	Log Comm.	Revisions	Custom Data	MU Helper
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Su	Мо	Tu	We	Th	Fr	Sa			Ту	pe 💿 Appoint	ment OVide	eo Visit 🔾	Break	U Walk-in	Transit	tion of Care	New Patient	Referral	
29	30	31	1	2	3	4			Provider	Dr. James S	mith	-		s	upervising	- If different	to provider -	~	
5	6	7	8	9	10	11							/			Office 1	to providor	· • •	
12	13	14	15	16	17	18	9:00am	9:00 - 9:30 am Jenny (Jen) Harris	Patient						Office:				
				23					Reason:						Profile:			~	
26	27	28	1	2	3	4		9:30 - 10:00 am							Eligibility Profile:			~	
Doc	tors		Se	lect a	ull / r	ione		Laurie T. Sample:	Scheduled:	02/03/2023	Time 10:3	¢ MA0			Exam:	Exam 1		~	
	Jane \$	Smith				◀			Duration:	30 minu	tes 🗌 Allow d	overlapping			Color:				
	Dr. Ja	mes	Smith	1		2	10:00am		Notes:						Status:			~	
Offi	ces		Se	lect a	ull / r	ione													
	Office	1						10:30am - 10:30am	Consent Forms:		a Use Agreemer					C Viev	w Clinical Note		
	Office	2						New event	Ponns.		Consent (defaul Policy (default)	t)				View Al	I Appointments		
	Office	3								R NO SHOW H	oncy (default)								

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.

dr chr	on	0						Schedule App	ointment									
Schedule		Clini	ical	Ρ	atients	Repo	rts Billing	Appointment	Billing	Eligibility	Vitals	Gro	owthcharts	Flags	Log Comm	. Revisions	Custom Data	MU Helper
O Feb		~ 2	2023	~	0	+ Event	🗂 Today 🛛	1										
Su Mo	Ти	We	Th	Fr	Sa			Тур	e 💿 Appointi	ment OVid	leo Visit (Break	Walk-in	n 🗌 Trans	ition of Care	New Patient	Referral	
29 30	31	1	2	3	4			Provider	Jane Smith		~		_ s	Supervising	- If differe	nt to provider -	~	
5 6	7	8	9	10	11							•			Office 1		~ + /	
12 13	14	15	16	17	18	9:00an	9:00 - 9:30 am Jenny (Jen) Harris	Patient						Office:	Office 1			
19 20	21	22	23	24	25			Reason:						Profile:			~	
26 27	28	1	2	3	4		9:30 - 10:00 am Laurie T. Sample:						10	Eligibility Profile:			~	
Doctors		S	elect	all /	none		Laune n'oumpie.	Scheduled:	02/03/2023	Time 10:0	MA00	;		Exam:	Exam 1		~	
🗹 Jane S	mith	n		4	1		10.00 10.00	Duration:	30 minut	es 🗌 Allow	overlapping			Color:				
🗹 Dr. Jar	nes	Smit	h		2	10:00am	10:00am - 10:00am New event	Notes:						Status:			~	
Offices		S	elect	all /	none		10:10 - 10:40 am Jeff Patient: Office											
Office	1							Consent	× HIPAA Dat	a Use Agreeme	nt (default)				🛛 🖉 V	iew Clinical Note		
_								Forms:	× Telehealth	Consent (defau	lit)				16	6 II. 6 I- t t-		
Office									× No Show F	olicy (default)					View	All Appointments		
Office	3																	

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.

chedule Appo	ointment								
Appointment	Billing	Eligibility	Vitals	Growthcha	rts Flags	Log Comm.	Revisions	Custom Data	MU Helper
Тур	e 💿 Appoint	tment OVide	eo Visit 🜖 🛛	Break	Walk-in 🗌 Tr	ansition of Care	New Patien	t 🗌 Referral	
WARNING: This p	atient is pre-	populated samp	ole data. 6 p	ast appointment	s CDS: Mamr	mogram screening	for all women a	ged 40-74	
Provider	Nick Riviera	1	~		Billing	- If different to	provider -	~	
Patient	Jenny (Jen) I	Harris	+ +	1	Office:	Primary Office	Э	+	
Reason:					Profile:			~	
Scheduled:	07/26/2020	Time 09:3	¢ MAD	/	Exam:	Dr. A		~	
Duration:	30 minu	utes 🗌 Allow d	overlapping		Color:				
Notes:					Status:			~	
Consent Forms:	× HIPAA Da	ta Use Agreemer	nt (default)			C View	Clinical Note		
						View All	Appointments		
] Recurring Appo] Arrange a Follov] View Active Rer	w-up Remind	ler							
Choose a Remin	der Profile:	Use Patient's	Last Reminde	rs	~				
Voice and Text Re	eminders are o	nly delivered bet	ween 5:00 AM	to 11:00PM.				+	New Reminder
				Delete Save &	Close Save	Cancel			

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

+ Event	🗂 Today	2 Refresh	🖶 Print A	ppts				••	Jul 26 2020 - Aug 1	₩
	ę	Sun 7/26	×		Mon 7/27	×	Tue 7/28	×	Wed 7	/29 🗙
8:00am										
9:00am	9:00 - 9:30 am Jenny (Jen) H	arris: Primary O	BW	9:00 - 10:11 Jenny (Jer	5 am n) Harris: Primary C	BW Office	A 9:00 - 9:30 am Chrissy Bright: Primary	BW	A 9:00 - 12:20 pm Jenny (Jen) Harris: P	BW Primary Office
10:00am	9:30 - 10:00 an Jenny (Jen) H Primary Office	9:45 - 10	15 am BW Ivatinos: Office				9:45 - 10:20 am Daniel Kivatinos: Primar	BW y Office		
	10:30 - 11:00 a Chris Genninç	m j: Primary Office	BW	10:30 - 11: Daniel Kivi	15 am atinos: Primary Off	BW) fice	10:35 - 11:10 am Daniel Kivatinos: Primar	BW y Office		
11:00am										

To go to your calendar click here.