

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.

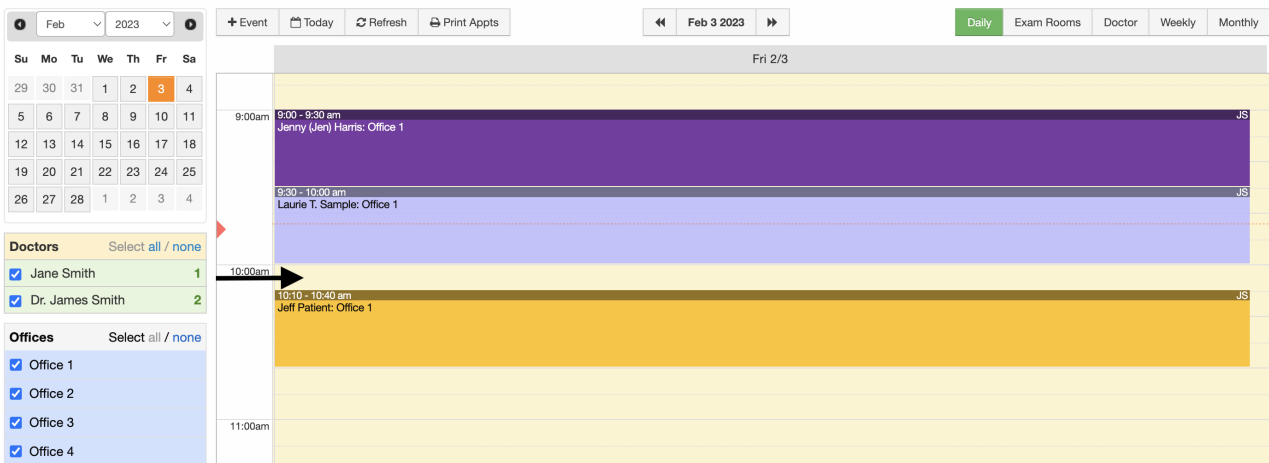
The screenshot shows the top navigation bar with 'Schedule', 'Clinical', and 'Patient' tabs. Below it is the 'SCHEDULING TOOLS' section, which is currently expanded to show 'Calendar'. Other options listed include Availability Search, Appointments Dashboard, Dashboard, Appointment Profiles, Appointment 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 displays a calendar interface for February 3, 2023. On the left, there is a calendar grid and a filter panel for 'Doctors' (Jane Smith, Dr. James Smith) and 'Offices' (Office 1, Office 2, Office 3, Office 4). The main calendar area shows a grid with time slots from 9:00am to 11:00am. Two appointments are visible: a purple slot from 9:00-9:30 am for Jenny (Jen) Harris in Office 1, and a yellow slot from 10:10-10:40 am for Jeff Patient in Office 1. A black arrow points to the '+ Event' button in the top toolbar, which also includes 'Today', 'Refresh', and 'Print Appts' options. The view is set to 'Daily'.

--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

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

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

Duration: 30 minutes Allow overlapping

Notes:

Consent Forms: HIPAA Data Use Agreement (default)

Billing: - If different to provider -

Office: Primary Office

Profile: -----

Exam: Dr. A

Color: [Orange]

Status: [Dropdown]

[View Clinical Note](#)

[View All Appointments](#)

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

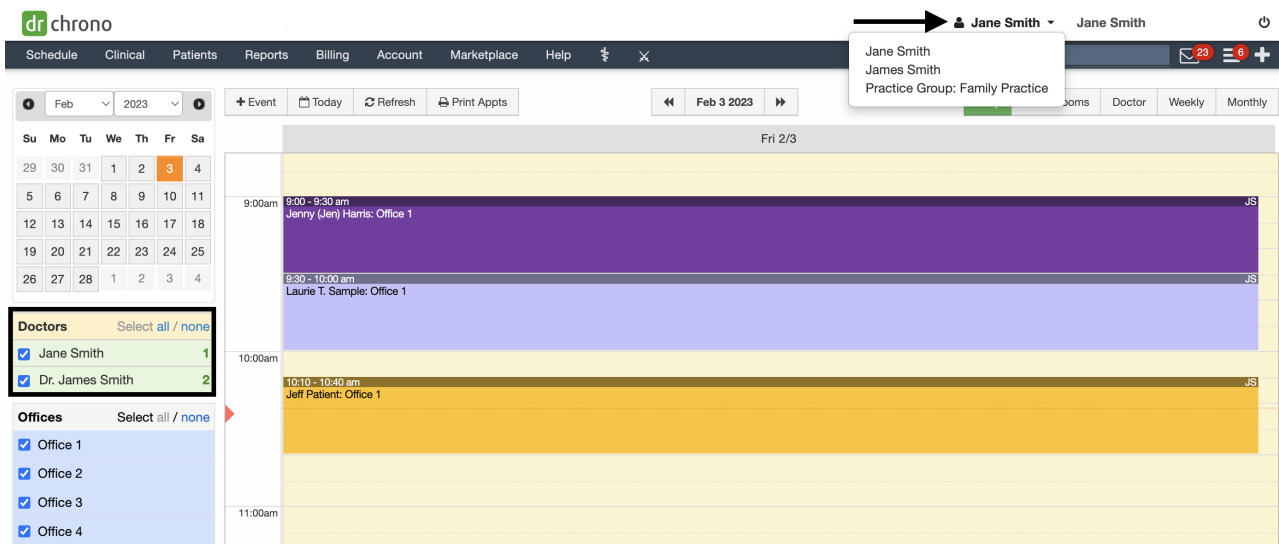
Choose a Reminder Profile: [Dropdown]

[+ New Reminder](#)

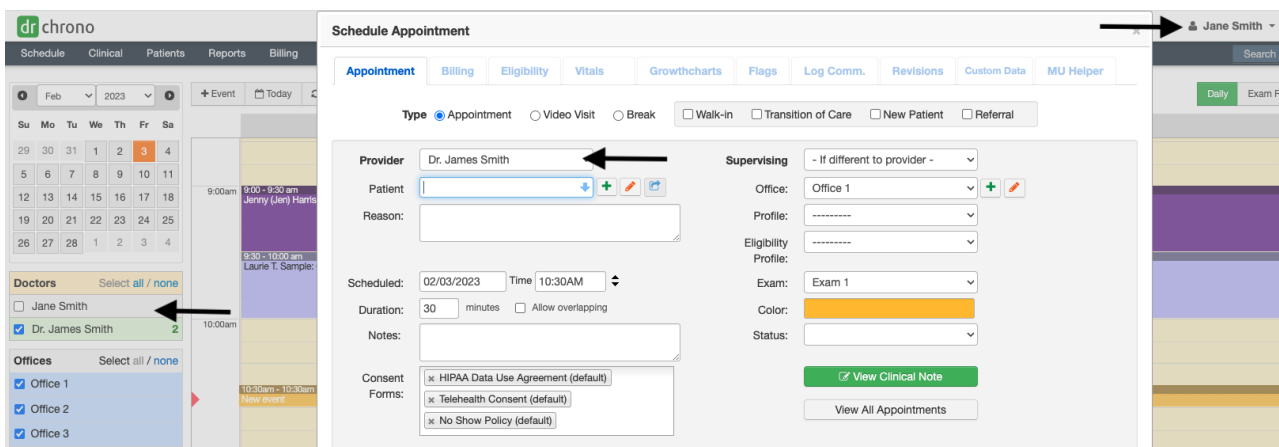
Voice and Text Reminders are only delivered between 5:00 AM to 11:00PM.

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

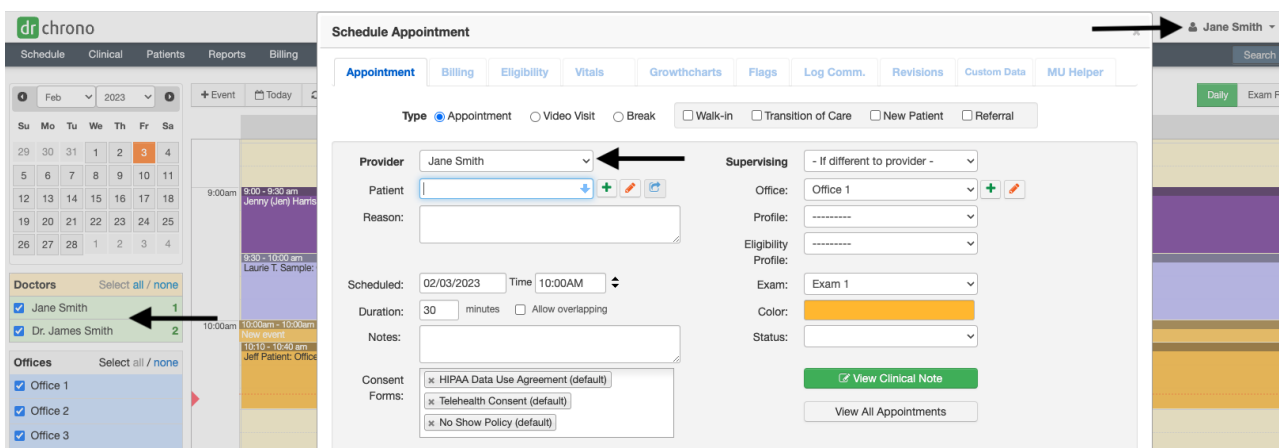
The default provider for the appointment will depend on which provider is selected in the provider dropdown on top and the providers selected on the side. Keep in mind that the provider for the appointment can be changed anytime in the appointment window.



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

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

Choose a Reminder Profile:

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

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](#).