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 C	linical	Ра
SCHEDULING TO	DOLS	
Calendar		
Availability Sea	ırch	
Appointments	Dashboard	b
Dashboard		
Appointment P	rofiles	
Appointment T	emplates	
Billing Profiles		
Reminder Profi	les	
Follow-up Rem	inders	
Recurring Ever	nts	
Bulk Appointm	ents	
Appointment R	ecovery	

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

0	Feb)	~	2023	~	0	+ Event	🗂 Today 🖸 Refresh 🔒 Print Appts 💜 Feb 3 2023 🇭	3 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) 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		9:30 - 10:00 am Laurie T. Sample: Office 1		_	JS
Doo	tors		S	elect	all / ı	one					
	Jane	Smith	n			1	10:00am				
	Dr. Ja	mes	Smit	h		2		10:10 - 10:40 am Jeff Patient: Office 1	_		JS
Offi	ces		S	elect	all / I	ione					
	Office	1									
	Office	2									
	Office	3					11:00am				
	Office	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]	4 Feb 3 202	3 🇰	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	ole: Office 1									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
Offi	ces		S	elect	all / I	none												
v (Office	1																
Z (Office	2																
Office 3			11:00am															
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.

opointment	Billing	Eligibility	Vitals	Growt	hcharts	Flags	Log Comm.	Revisions	Custom Data	MU Helper				
Type () Appointment Video Visit () Break Walk-in Transition of Care New Patient Referral														
Provider	Nick Riviera		~			Billing	- If different to	provider -	~					
Patient	harris		++	/		Office:	Primary Office	9	v 🕇 🥖					
Reason:	Jenny (Jen) H George Harris	larris - 02/11/19 son - 09/01/197	80 2			Profile:			*					
Scheduled:	Michelle Harr 07/26/2020	I Ime 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						
Recurring Appointment Arrange a Follow-up Reminder View Active Reminders:														
noose a Remir	nder Profile:				*				_					
ion and Taxt D	eminders are o	nly delivered be	tween 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 chrono						Lane Smith ▼	Jane Smith	
Schedule Clir	nical Patients	Reports Billing	Account Marketplace H	Help 🛊 X		Jane Smith		_ <mark>⊵23</mark> ⊒ 9 +
G Feb V	2023 ~ 0	+Event ⊟Today 3	Refresh 🖨 Print Appts	€ Fet	o 3 2023 ₩	Practice Group: Family Practice	Joms Doctor	Weekly Monthly
Su Mo Tu We	e 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						JS
12 13 14 15	16 17 18	Jenny (Jen) Harris: 0	Office 1					
19 20 21 22	23 24 25							
26 27 28 1	2 3 4	9:30 - 10:00 am Laurie T. Sample: O	Office 1					JS
Doctors S	Select all / none							
Jane Smith	1	10:00am						
Dr. James Smi	ith 2	10:10 - 10:40 am Jeff Patient: Office 1	1					JS
Offices S	Select all / none							
Office 1								
Office 2								
Office 3		11:00am						
Office 4								

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 Appointment										
Sc	Schedule Clinical Patients Reports Billing								Appointment	nent Billing Eligibility Vitals Growthcharts Flags Log Comm. Revisions Custom Data MI									MU Helper
0	Feb		× 20	023	~	0	+ Event	🗂 Today 🛭 🗧	1										
Su	Su Mo Tu We Th Fr Sa							Ту	Type (a) Appointment Video Visit Break Walk-in Transition of Care New Patient Referral										
29	30	31	1	2	3	4			Provider	Dr. James S	mith	-		s	unervising	- If different	to provider -	~	
5	6	7	8	9	10	11			Detient					0	Officer	Office 1	to providor		
12	13	14	15	16	17	18	9:00am	9:00 - 9:30 am Jenny (Jen) Harris	Patient						Office:	Onice I			
19	20	21	22	23	24	25			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	× HIPAA Dat	a Use Agreemer	nt (default)				C Viev	w Clinical Note		
	Office	2						New event	Ponns.	× Telehealth	Consent (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	Schedule Appointment											
Schedule		Clini	ical	Ρ	atients	Repo	rts Billing	Appointment	Appointment Blilling Eligibility Vitals Growthcharts 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						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	New event	Notes:						Status:			~			
Offices		S	elect	all /	none		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	2								× 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 Appointment														
Appointment	Billing	Eligibility	Vitals	Growthcha	rts Flags	Log Comm.	Revisions	Custom Data	MU Helper					
Type Appointment Video Visit Break Walk-in Transition of Care New Patient Referral 														
VARNING: This patient is pre-populated sample data. 6 past appointments CDS: Mammogram screening for all women aged 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	intment w-up Remind minders:	ler												
Choose a Remin	der Profile:	Use Patient's	Last Reminde	rs	~									
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	2 Refresh	🔒 Print A	ppts				•	Jul 26 2020 - Aug 1	*	
	Ś	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 - 10:15 am Jenny (Jen) Harris:	Primary Office	BW	A 9:00 - 9:30 am Chrissy Bright: Primary Office	BW	A 9:00 - 12:20 pm Jenny (Jen) Harris: P	rimary Office	BW
10:00am	9:30 - 10:00 an Jenny (Jen) H Primary Office	n NR larris: 9 9:45 - 10 Daniel K Primary	15 am BW Ivatinos: Office				9:45 - 10:20 am Daniel Kivatinos: Primary Offic	BW			
	10:30 - 11:00 a Chris Genninç	m g: Primary Office	BW	10:30 - 11:15 am Daniel Kivatinos: P	rimary Office	BW	10:35 - 11:10 am Daniel Kivatinos: Primary Offic	BW			
11:00am											

To go to your calendar click here.