

Duplicate Appointment Warning

07/24/2024 2:10 pm EDT

In the event that an appointment is scheduled for the same patient on the same day, you can enable a setting so that a warning message will appear.

To enable the setting, go to **Account > Provider Settings** and click on the **General** tab.

Account Marketplace

ACCOUNT SETTINGS

User Settings

Provider Settings

onpatient Settings

Account Setup

Custom Fields

Under the Calendar Setting section, check the box for the **Duplicate Appointment Warning**.

Calendar Settings

Display flag icon on appointment	<input type="checkbox"/>	Display Flag icon on appointments when a patient/appointment has flag associated
Display lock icon on appointment	<input checked="" type="checkbox"/>	Display Lock icon on appointments when a patient/appointment is locked
Use new dashboard homescreen	<input type="checkbox"/>	Uncheck to go straight to the calendar after logging in
Show user satisfaction survey	<input checked="" type="checkbox"/>	Uncheck to opt out of user satisfaction surveys.
Default Office	<input type="text" value="Office 2"/>	Default Office on Calendar
Duration of Exam	<input type="text" value="30"/>	Default duration of an exam in minutes
Duration of Follow-up	<input type="text" value="15"/>	Default duration of a follow-up exam in minutes
Examroom Calendar Increments	<input type="text" value="10"/>	Adjust minute increments on calendar
Date range on Appointment Template	<input checked="" type="checkbox"/>	If true date range can be set for Appointment Template (starting from - ending by).
Appointment Templates in more views	<input checked="" type="checkbox"/>	Show appointment templates in Daily View, Doctor View and Weekly View
Allow Exam Room Overlaps	<input type="checkbox"/>	Allow appointments to overlap within an exam room
Global Overlap Checking	<input type="checkbox"/>	Disallow overlapping appointments in any office or exam room
Appointment Default Color	<input type="text" value="Yellow"/>	
Phonetic Name	<input type="text"/>	Used by automated phone system to pronounce doctor's name
Hide cancelled appointments	<input checked="" type="checkbox"/>	Don't show cancelled appointments on appointment calendar (web only).
Hide rescheduled appointments	<input checked="" type="checkbox"/>	Don't show rescheduled appointments on appointment calendar (web only).
Duplicate appointment warning	<input checked="" type="checkbox"/>	Display a warning if a duplicate appointment is being created for a patient on the same day

Scroll down and click **Update Entire Profile** to save your settings.

Update Entire Profile

Let's take a look at an example to see how this works.

Below, the patient Laurie Sample already has an appointment. So let's try and schedule another appointment for her on the same day.

Mon 2/20

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

Patient Statement Balance: **\$335.00** Generate Statement Credit: **\$190.00** 62 past appointments Primary Insurance: United HealthCare [87726]

Fall Risk:

Provider: Jane Smith

Patient: Laurie Test Sample

Reason:

Scheduled: 02/20/2023 Time 11:00AM

Duration: 30 minutes Allow overlapping

Notes:

Consent Forms: HIPAA Data Use Agreement (default) No Show Policy (default)

Supervising: - If different to provider -

Office: Office 1

Profile: -----

Eligibility Profile: -----

Exam: Exam 1

Color: [Yellow]

Status: -----

View Clinical Note

View All Appointments

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

Delete Save & Close Save Cancel

Once you click **Save** or **Save & Close**, a warning will appear that says that the patient already has an appointment scheduled for that date. The warning will also show the provider the appointment is scheduled with. Click **OK** to continue.

Appointment Billing Eligibility

Type Appointment Visit

Patient Statement Balance: \$335.00 Generate

Fall Risk:

Provider: Jane Smith

Patient: Laurie Test Sample

Reason:

Scheduled: 02/20/2023 Time 11:00AM

Duration: 30 minutes Allow overlapping

Notes:

Consent Forms: HIPAA Data Use Agreement (default) No Show Policy (default)

Profile: -----

Eligibility Profile: -----

Exam: Exam 1

Color: [Yellow]

Status: -----

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Delete Saving... Save Cancel

Error saving appointment. Please review the following errors and then try again:

This patient already has one or more appointments for that day with:
Jane Smith

Press 'Override & Save' to override this error and save the appointment.

OK

Next, click **Cancel** to not schedule the appointment. However, if you do need to schedule a second appointment for the patient, click **Override & Save, Close,** or **Override & Save** to continue with scheduling the 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

Patient Statement Balance: \$335.00 [Generate Statement](#)

Credit: \$190.00

62 past appointments

Primary Insurance: United HealthCare [87726]

Fall Risk:

Provider	Jane Smith	Supervising	- If different to provider -
Patient	Laurie Test Sample	Office:	Office 1
Reason:		Profile:	-----
Scheduled:	02/20/2023 Time 11:00AM	Eligibility Profile:	-----
Duration:	30 minutes <input type="checkbox"/> Allow overlapping	Exam:	Exam 1
Notes:		Color:	
Consent Forms:	<input checked="" type="checkbox"/> HIPAA Data Use Agreement (default) <input checked="" type="checkbox"/> No Show Policy (default)	Status:	

[View Clinical Note](#)
[View All Appointments](#)

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

Delete
Override & Save, Close
Override & Save
Cancel