EHR Go Guide: Scheduling in the EHR

Introduction

The Scheduling tab of the patient chart is where you can view the clinic schedule and add or edit patient appointments. Additional appointment functions such as confirmation, check in, rescheduling, and no-show indications are also part of the Scheduling tab. In addition, a provider's calendar may be blocked to reflect availability.

In EHR Go, the Scheduling tab is in the Accounts section. The Accounts section is generally locked (not accessible to you) for inpatient charts but can be accessed for outpatient charts.

Additional resources

Please refer to the *Student Guide to EHR Go* for information on logging in to Go and launching an activity in the EHR.

FAQs about scheduling

1. **How do I see the patient's existing appointments?**
   a. After selecting the Scheduling tab, select Patient Schedule Overview. Scroll through the calendar to locate existing appointments. See page 4 of this guide.

2. **What if clinic information isn't available in a patient chart?**
   a. Not all patient charts in EHR Go include a populated clinic schedule. These charts may still be used for scheduling new appointments for the patient and/or provider calendar blocks.

Accessing scheduling functions in the EHR

After launching the EHR for a patient chart, select the Account section, then the Scheduling tab:

If you see a padlock symbol next to Account, then the section has been locked for that particular chart and may not be viewed or edited. In EHR Go, most inpatient charts have the Account section locked, but most outpatient charts may be edited.

By default, the clinic schedule will be displayed when accessing the Scheduling tab. Some patients in Go have clinic schedules displaying patient appointments like the one shown in the screen shot below. Other patient charts may have blank schedules which may still be used for scheduling new appointments and provider calendar blocks.
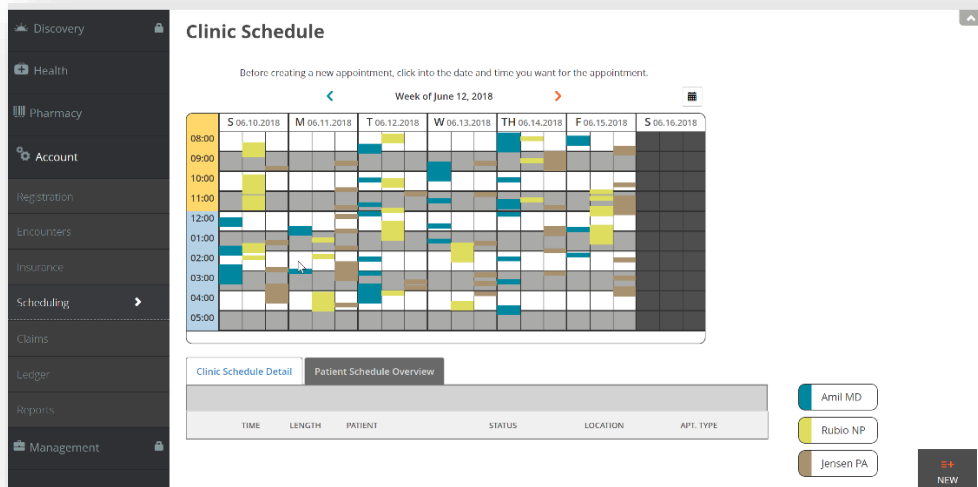
In this example, there are three different providers listed in the right corner (Amil, Rubio, Jensen). Each provider has a dedicated color and column for each day to show their availability.

The clinic schedule displays the current week. Use the arrows next to the date to scroll ahead or back by a week in the schedule. Another option is to click on the calendar icon and select a specific day to be brought directly to that week in the calendar display.
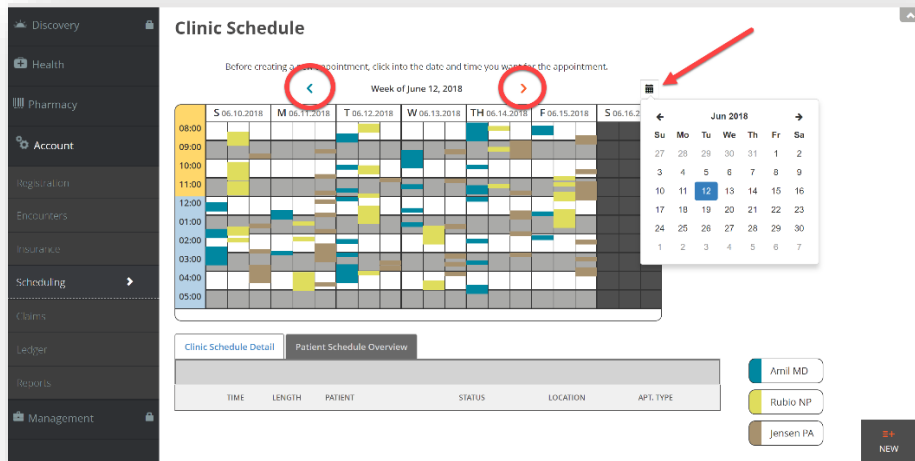
Select a specific time on the calendar to see more details about the appointments that are scheduled at that time. Likely, these will be for patients other than the one you have selected. A listing will appear in the table at the bottom of the page. This table summarizes the appointment time, length (duration), patient name, status, location, and appointment type for each listing at that time.
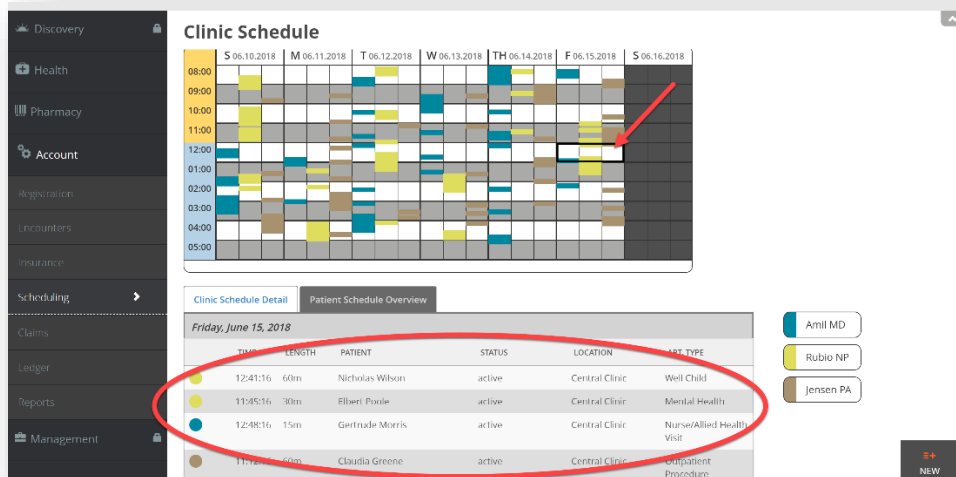
You may select a listing from the table to see more details. However, the appointments for other patients may not be edited. When a listing from the Clinic Schedule Detail table is clicked on, a read-only Appointment Details box is displayed.
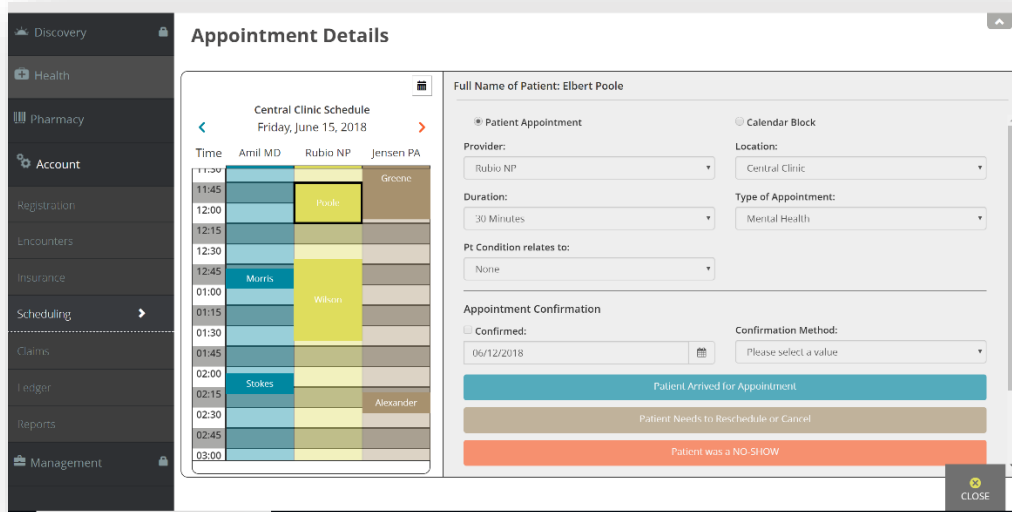
Select **Close** to return to the full Clinic Schedule.

Select **Patient Schedule Overview** tab to see existing appointments specifically for the patient whose chart is open.

If the patient has an appointment scheduled, **locate it on the calendar**. You may need to scroll ahead or enter a date using the calendar icon. Then, click on the calendar entry to see more information. After selecting the calendar entry, a listing in the Patient Schedule Overview table below will appear.

Click anywhere on the table listing to view the Appointment Details.

The Appointment Details is where you may edit existing appointment information, confirm an appointment, check in a patient, reschedule or cancel an appointment, and also indicate a no show. See the next sections for more information.

Managing an existing appointment

After selecting an appointment following the steps in the previous section, the Appointment Details will be displayed.
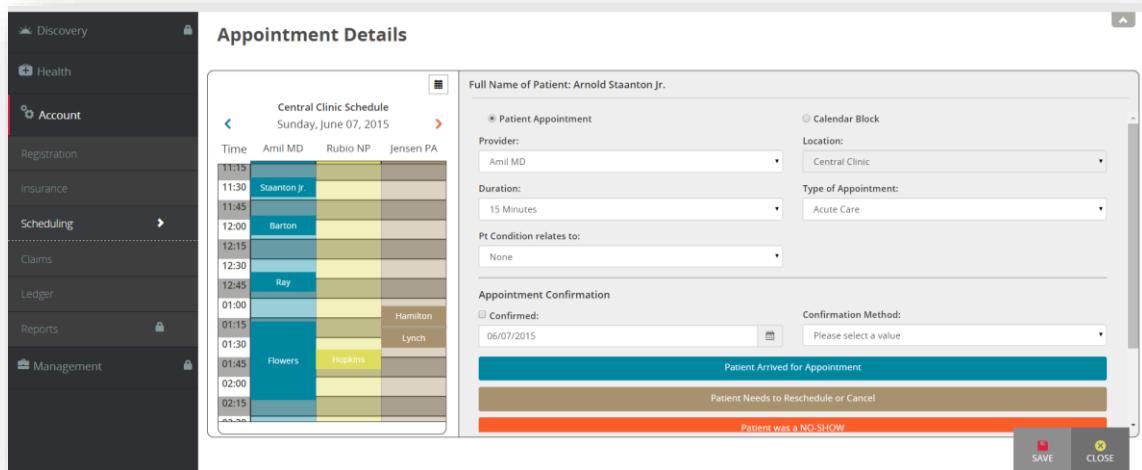

The following functions are available from the **Appointment Details** screen provided you're working with an appointment for the patient who's chart is open. (Details can't be changed if you've accessed an appointment for another patient.) See separate sub-sections below for each topic.

- A. Editing existing appointment details
- B. Confirming an appointment
- C. Checking in a patient
- D. Rescheduling or cancelling an appointment
- E. Indicating a no-show

A. Editing existing appointment details

In the Appointment Details window, the Provider, Duration, Type of Appointment, and Pt Condition fields may be changed whether the appointment was scheduled by you or was already part of the patient chart/activity. Note: If you'd like to select a new date/time see the *Rescheduling or cancelling an appointment* section.
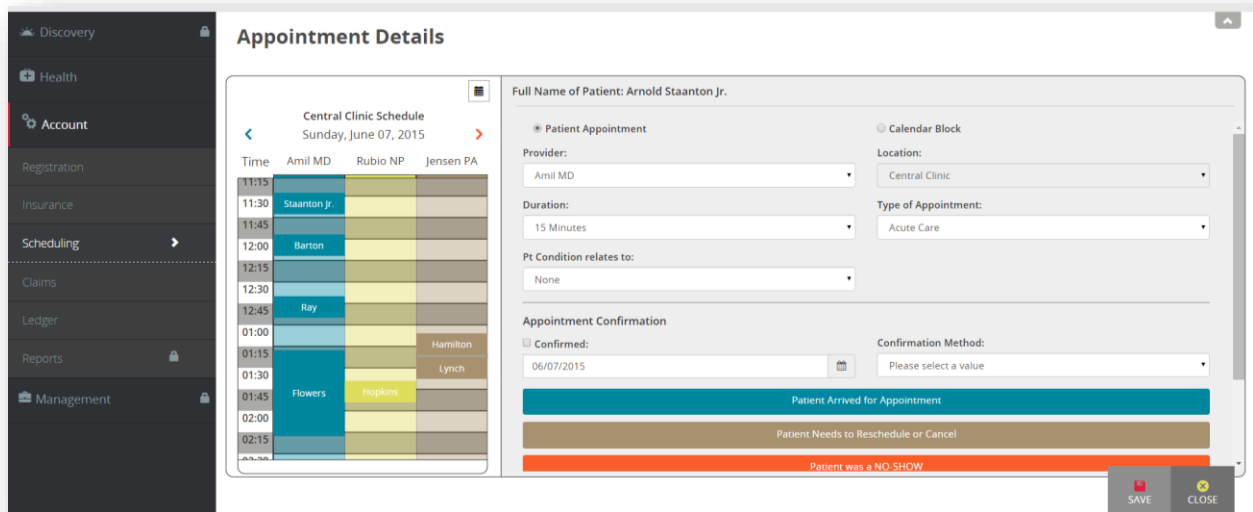
If changing the Provider and/or Duration fields, reference the calendar on the left side of the screen to ensure availability with the new selection. After editing the desired fields, select **Save.** You will receive a confirmation message indicating the appointment has been updated.
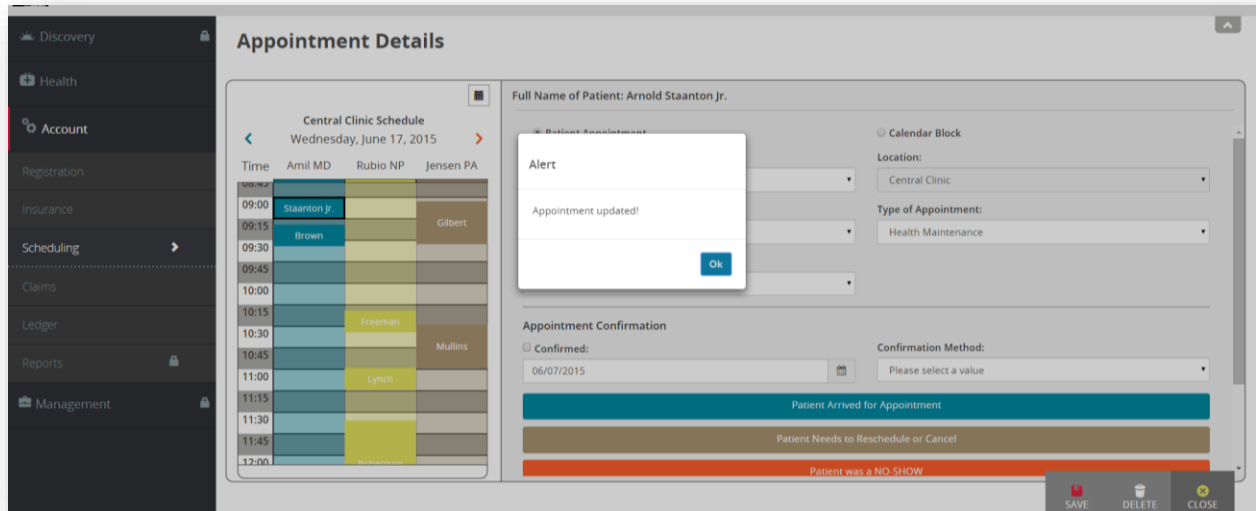
Select **OK** to return to the Appointment Details.

If you originally scheduled the appointment, then you may also delete it here. Select **Delete** in the bottom right corner of the screen.

A confirmation message will appear after selecting Delete. Select **Yes** to delete the appointment. Deleting is permanent and typically used if there was an error. If the patient is cancelling the appointment, see *Rescheduling or cancelling an appointment* section below.

B. Confirming an appointment
To document that an appointment has been confirmed by phone or email, check **Confirmed** then select a Confirmation Method. Then press **Save.**

An alert will appear indicating the appointment has been updated. Select **OK** to return to the Appointment Details.

C. Checking in a patient

If the patient has arrived for his or her visit, select the blue **Patient Arrived for Appointment** button in the Appointment Details screen.
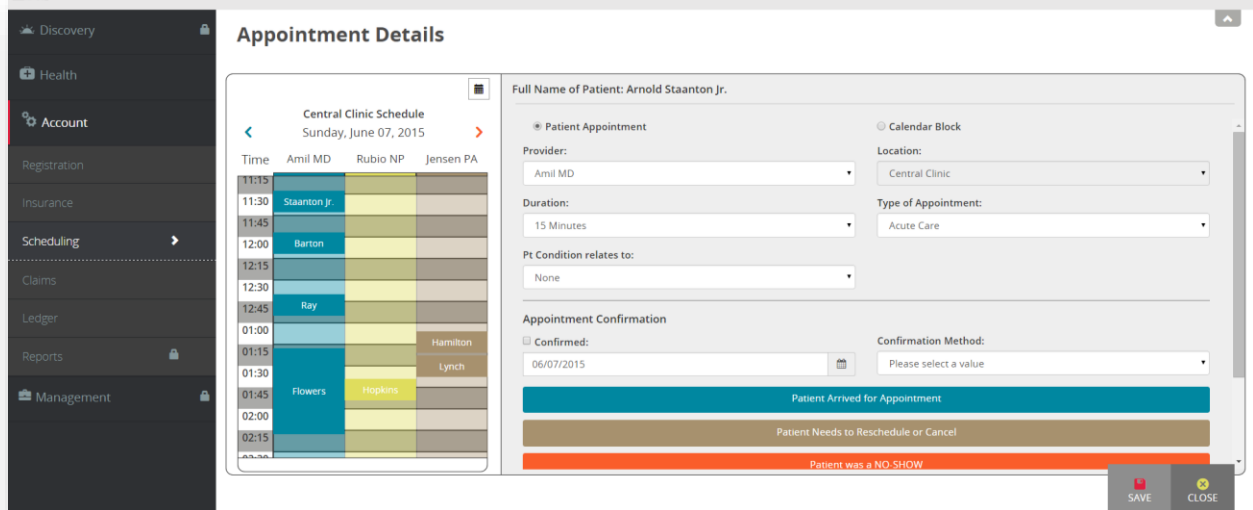
The following Check in screen will appear:
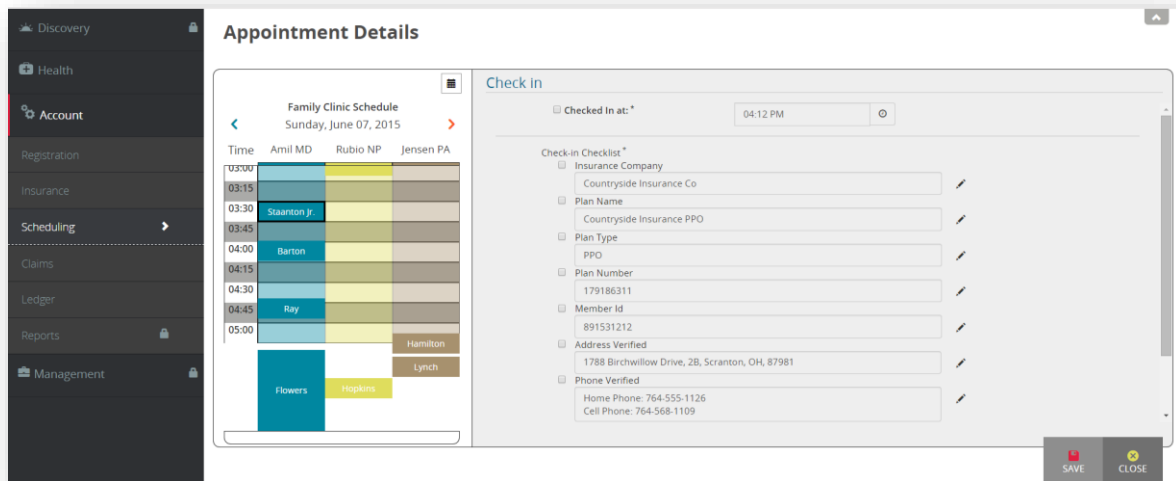
Select the box for **Checked in at** and adjust the time if needed.

Proceed to verify the patient's insurance information, address, and phone number. Check each box after verifying and make edits as necessary. Data can be edited by selecting the pencil icon next to each field.

Select **Save** when finished and a confirmation alert will appear.

Select **OK** to close the alert. Then select **Close** to exit the Check in screen and return to Appointment Details.
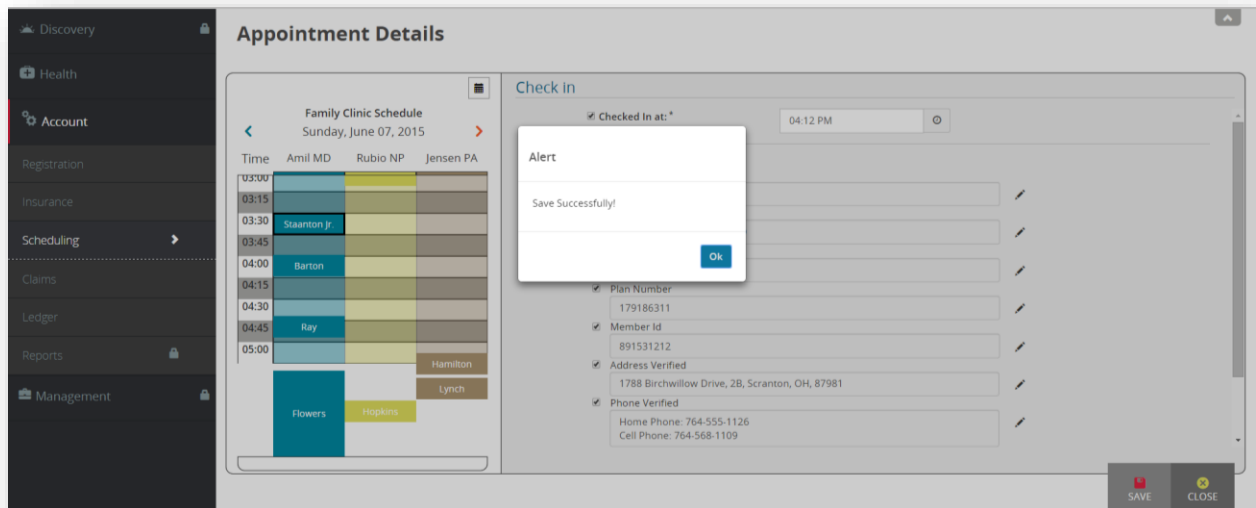
D. Rescheduling or cancelling an appointment

If the date and/or time of the appointment needs to be adjusted, or the appointment needs to be cancelled, select the brown **Patient Needs to Reschedule or Cancel** button in the Appointment Details.

Rescheduled is selected by default. If rescheduling, select a new date and time. Refer to the calendar on the left side of the screen to check for availability. The Provider, Duration, and Type of Appointment can also be adjusted.

Select **Save** when finished to return to Appointment Details.

If the appointment is being cancelled, toggle the **Cancelled** button. Select a Cancellation Reason from the dropdown menu and adjust the Date of Cancellation, if needed. Enter notes (optional), then select **Save.**
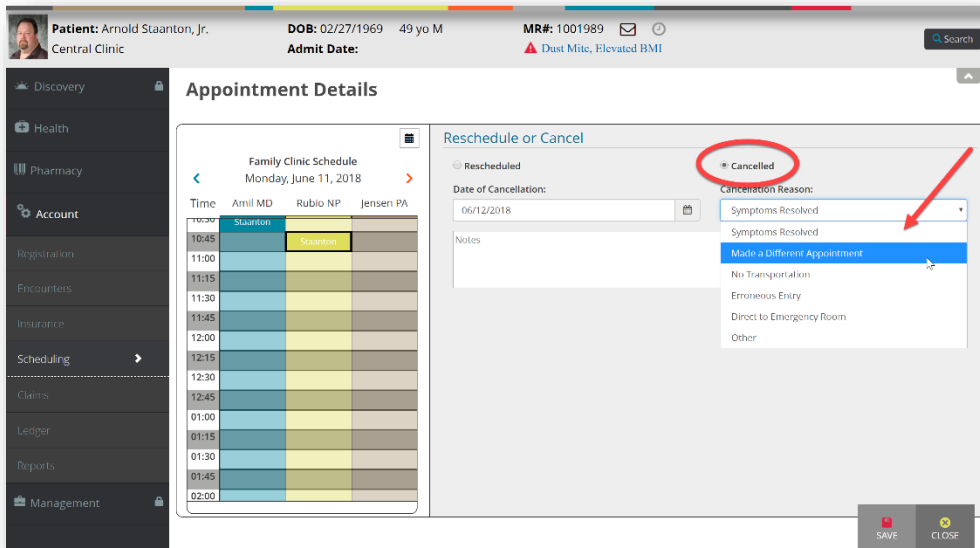
You'll then be brought back to the Appointment Details window as if you were scheduling a new appointment. Select **Close.**

E. Indicating a no-show
If the patient did not show up for a scheduled appointment, select the orange **Patient was a NO SHOW** button.
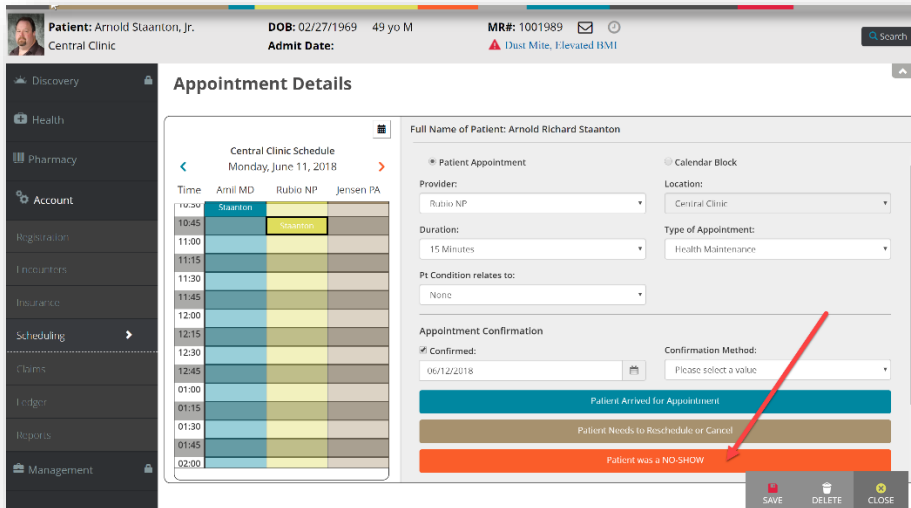
A confirmation message indicating the appointment has been updated will appear. Select **Ok.**
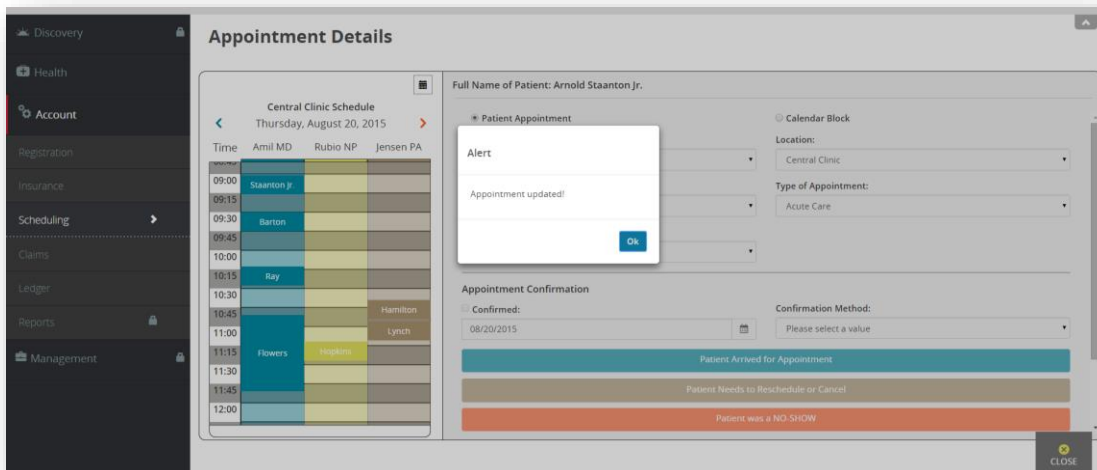

Select **Close** to return to the Clinic Schedule.

When you are finished in the patient chart, select **Close Session**. **Important!** This is how your work is saved. Do not close your browser window or tab without clicking Close Session.
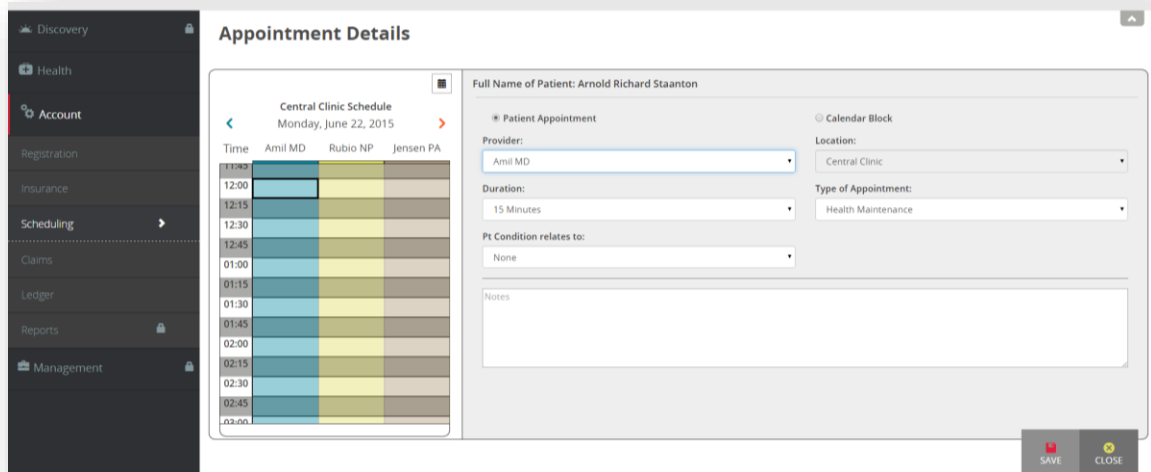
Scheduling a new appointment

To schedule a new appointment for the patient, select the Scheduling tab from the Account section. Select an available time on the Clinic Schedule calendar. Then select New in the bottom right corner.
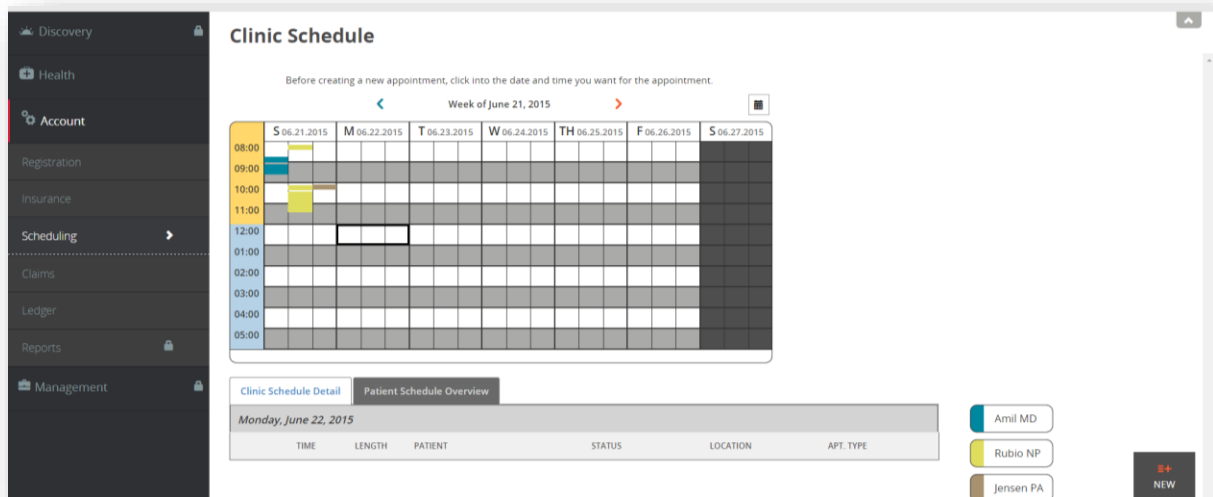
The following Appointment Details window will appear:

Select entries for the following fields:

- **Patient Appointment or Calendar Block**: Select Patient Appointment (default)
- **Provider:** Choose the provider responsible for the visit from the dropdown options. Ensure that provider is available at the selected time by referencing the calendar on the left.
- **Location:** Central Clinic is the default entry and cannot be changed
- **Duration:** Select the estimated duration of the appointment
- **Type of Appointment:** Select from the dropdown options
- **Pt Condition relates to:** If the patient's appointment is due to a health condition related to work or an accident, indicate accordingly
- **Notes:** Optionally, enter additional information regarding the patient's condition or reason for the appointment

After entering the information, select **Save.** The appointment has been added to the Clinic Schedule.

When you are finished in the patient chart, select **Close Session**. **Important!** This is how your work is saved. Do not close your browser window or tab without clicking Close Session.
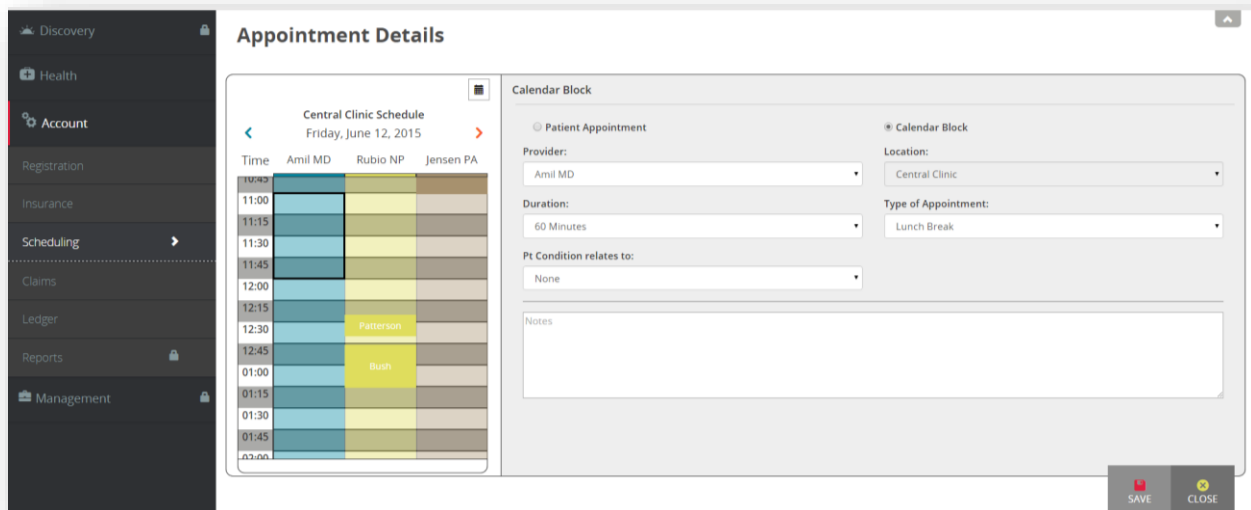
Scheduling blocked calendar time for providers

To block a provider's calendar to reflect their availability, first select a patient chart to access the scheduling functions. See the *Accessing scheduling functions* section of this guide for more information.

After selecting the Scheduling tab in the Account section, the **Clinic Schedule Overview** will appear.

Scroll through the calendar to the date in which you'd like to add blocked time. The calendar icon can also be used to select a specific date. Click the timeslot on the calendar, then select **New.**

Select **Calendar Block,** then update the Provider, Duration, and Type of Appointment fields based on the time you are blocking. Then select **Save.**

The calendar on the left side of the screen will now show the blocked time. Select **Close.**

When you are finished in the patient chart, select **Close Session**. **Important!** This is how your work is saved. Do not close your browser window or tab without clicking Close Session.