How to Add a Planned Appointment

This outline will guide the user through how to Add a Planned Appointment from the EHR.

The Topic covered in this Outline is:
- Adding a Planned Appointment from the EHR

Adding a Planned Appointment from the EHR

- Click on the EHR Module
- Select the Tx History Tab
- Select the Planned Treatment that requires a Planned Appointment
• Right Click the Planned Treatment
• Select Add Planned Appt… from the drop-down menu
- The patient and Provider code will automatically populate
- Enter in Appointment code, Clinic, Not Before Date and the Reason

- Behind the Tx Plan Button, the treatment tied to the appointment is displayed in the Appointment Treatments window
A Yellow Icon now appears in the same line as the Planned Treatment in the EHR to indicate that a Planned Appointment is linked to the treatment.

**Booked Appointment** – When the appointment is scheduled, the Yellow Icon turns to White.