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
### How to Add a Planned Appointment

- Right Click the Planned Treatment
- Select Add Planned Appt... from the drop-down menu

![Drop-down menu with Add Planned Appt... highlighted](image-url)
• 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.