How to Schedule with Expert

This document outlines how to schedule for the DFP using the expert.

Topics Covered:
- Scheduling a Planned Appointment

Scheduling a Planned Appointment:

- Navigate to the Scheduler Module
- Click on the Rolodex icon
- Search for the patient and double click on the patient’s name
- This will open the Family Appointments Window
In the Family Appointments Window, all unscheduled planned appointments will list
- Select the appointment to be scheduled
- Click on ‘Sch w/Expert’

The Appointment Expert Window will come up
- Confirm the Provider’s name, the patient’s name, clinic and appointment code is correct
- Click on Search
- 10 results come up, highlight the ideal appointment

NOTE: Because the Provider has filled out the Provider field, patient’s name, appointment code and clinic from the Planned Appointment, the Expert will automatically will pull this into the corresponding fields
• Select the Appointment of choice

• Click on the ‘Make Appts…’ button

• The appointment has been made in the DFP book
NOTE: If nothing is populating after you have clicked search, make sure that the “Based on the Appt book” is unchecked AND make sure that the “Search on Available Chairs” button is on.